north east
autism society



REMEMBER US IN YOUR WILL
Help our work live on...

# Pass on Something Wonderful

# *Legacy Guide*

This guide has been put together as a helpful introduction if you're considering making or updating your Will. As everyone's situation and wishes are different, we advise you speak to a solicitor to ensure these are recorded correctly.

We hope this guide will help with these conversations and answer your questions around Will-making.

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# About
# North East Autism Society




**Thank you for considering leaving a gift to North East Autism Society in your will.**

Our work supporting autistic people started over 40 years ago, with the pioneering families of autistic children. These parents re-mortgaged their own homes in order to provide the environment and support needed for their children to reach their potential.

Since then our organisation has grown and we now provide a range of services throughout the North of England including education, residential care, short breaks, employment support, vocational training and family support groups.

We are the leading voice concerning autism and neurodivergence in the region. As such, we are passionate advocates for the skills, talents and abilities of our people.

Today, our mission is the same – to provide the best support and care for children, young people, and adults accessing our services. To give them the opportunities they need to thrive.

By leaving us a gift in your will you can help us to continue their legacy.

# Why your gift is important:

It helps us to keep developing, adapting and innovating to ensure our children, young people and adults have the happiest, healthiest most fulfilling lives possible.

By leaving a gift you will help to provide a lasting legacy for them, giving the opportunities needed to fulfil their potential.

Your legacy will be the child who speaks, when everyone said they never would; the teenager who gains their first friend; the adult who gains employment giving them independence; and the family who finally have peace of mind.

We, and they, really appreciate your support.



**“A gift left in a will is very special to us; it helps us plan into the future and ensure we can continue our vital work”**

# How legacy gifts change lives

**Every gift made makes a real impact.**

A gift in your Will could set up services in new areas, provide support for families or purchase much-needed specialist equipment.

Every week we are inundated with enquiries from families from across the North of England wondering where to turn to; and for many it can be a long, lonely journey to receive an official diagnosis, with very little in terms of support or direction in the meantime. We are committed to families at every stage of their journey, which is why we run free parent support groups and workshops across the region.

Whether families have a toddler, a teenager or an adult son or daughter, our team is on hand to offer advice and to listen; while helping introduce parents, guardians and carers to a peer support network of other people in similar situation. Our parent group and workshops are free to those accessing this service.

Your gift could ensure projects just like this are fully resourced, so we can keep running these lifeline services.




Jane, Mum

**“The world is a confusing place if you are autistic, and I’ve not always been equipped to understand that or to be able to help my own Son. This group has helped in so many ways.”**





# Making a Will

Making a Will is vitally important in ensuring your savings and possessions go to the people and causes you care about. Your will reflects the person you are, the values you hold and shows the love to the people and causes you hold close to your heart.

If you die without making a Will, you are said to have died “intestate”. If this happens, UK law will specify who inherits your estate (property, personal possessions and money), rather than who you would like it to go.

By writing a Will, you decide who you want to benefit. You can ensure your loved ones and the causes you care about are provided for in exactly the way you wish.

And if you do want to consider leaving a gift to North East Autism Society in your Will, no matter how small, it will mean your values live on and you’ll continue to change lives long into the future.

# Getting Started

Before you make a Will, you need to have an idea of what your estate is worth and how you would like it to be divided among the people and causes you care about. We advise you draw up a list of your assets, including any outstanding debts you might have, and make a rough estimate of the value of each.

Then decide who you would like to leave your assets to, and what you would like them to have. Also think about who your executors will be (the person or people who will make sure your wishes are carried out), as well as any legal guardians for dependents.

Once your will is made, make sure it is kept up-to-date with any key changes in your life.

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# Writing your Will

We have joined forces with Remember A Charity and Co-op Legal Services to offer our supporters 20% off the Co-op's Will writing services and access to free advice and support if you want to write or update your Will.

Co-op Legal Services is trusted for its strong ethical beliefs and socially responsible working.

There is no obligation to leave us a gift when using our Will-writing services, but we hope that you will consider helping us to support autistic people to have the best future.

If you would like to find out more about this offer, please visit Remember a Charity website for further guidance and information, or contact us: **legacy@ne-as.org.uk**
**https://www.rememberacharity.org.uk/making-a-will**

# I need to make a Will

As detailed above, through our partnership with Remember a Charity we are able to offer a specially discounted Will through Co-op Legal Services and access to free advice and support if you want to write or update your Will.

You can visit the Remember A Charity website to start this process, as well as some useful tips and advice. Alternatively give us a call if you would like any further information.

We suggest that you always get help from a solicitor to ensure your wishes for your family and any charities you support will be clearly understood and recorded correctly. Remember A Charity can also help to find a solicitor in your local area, who will be able to advise you on leaving gifts to charities when making a Will.

**https://www.rememberacharity.org.uk/making-a-will/find-a-solicitor/**



# How do I leave a gift?

Leaving a gift in your Will is actually easier than you might think: it's not complicated or something only the rich and famous do.
After providing for your family and friends, you can choose to leave a gift to us in your Will to help us to continue to provide our vital services. You are completely in control of how much you choose to give. Whatever the size of your gift, it will make a huge difference to the people we support.

Whether you have a Will already, or you are planning to write your first Will, leaving a gift to North East Autism Society is easy to do.

# I already have a Will

If you have a Will already set up, you can add a codicil to update your wishes. A codicil is a way to add a gift to your latest Will.

Alternatively, you can make a new Will. Once a new Will is written, any Wills made by you in the past become void.



# Adding a Codicil

It is possible to amend your existing will by using a codicil, without having to re-write the entire document. You must keep the codicil with (but not attached to) your Will.

If you have a Will but would now like to add a gift to North East Autism Society you can use our simple codicil form.

If you have any questions about writing a codicil or updating your will, you should seek advice from a solicitor.

**For further information on making your Will please see our FAQs on page 16. Remember a Charity website also has a wealth of information and advice on making and amending Wills.**

# Codicil Form

## Updating your Will

If you have already made a will but would now like to add a gift to North East Autism Society, you can do this by adding a codicil to update your wishes. A codicil allows you to add a new instruction to your existing will, without having to draw up a new one.

**How to complete your codicil form**

**Step 1)** complete the codicil form with your information where indicated.
**Step 2)** sign each page in the presence of two independent witnesses, who should both sign the form where stated too.
**Step 3)** keep your codicil safe, storing it with your current original Will (but not attached in any way) and keep a copy of the codicil with any copies of your will held by your solicitor or by other individuals.

We recommend that you seek the guidance of a solicitor when you make your Will or codicil, so that your intentions can be fully carried out.

I, (full name)

of (full address) Postcode:

declare this to be the first/second/third codicil to my Will dated: ☐☐ / ☐☐ / ☐☐☐☐

**I give (please tick as appropriate)**

☐ the following proportion of the residue of my estate ☐ (state the percentage or share)

☐ the sum of £ ☐ (state the amount)

☐ a specific item ☐ (state item)

to North East Autism Society (Registered Charity Number 1028260) of 15 Lumley Court, Drum Industrial Estate, County Durham, DH2 1AN, to be used for its charitable purposes and I declare that the receipt of the proper officer of the charity shall be a full and sufficient discharge for my Trustees.

**In all other respects I confirm my said Will and any other existing codicils thereto.**

**Date:** ☐☐ / ☐☐ / ☐☐☐☐

**Please ensure that you sign this form in the presence of two independent witnesses. The following people cannot witness your codicil:**

- Your executor
- Your executor's spouse
- A beneficiary of your Will
- A beneficiary's spouse.

**Witnessed By:**

Witness one full name

Address:

Occupation:

**Signed:**

**Date:** ☐☐ / ☐☐ / ☐☐☐☐

**Witnessed By:**

Witness one full name

Address:

Occupation:

**Signed:**

**Date:** ☐☐ / ☐☐ / ☐☐☐☐

**Signed:**

**Thank you for your support**

# Let us know you've left us a gift

If you are planning on, or have already left us a gift, we would love to hear from you.

You have no obligation to tell us, but if you would like to let us know you have left a gift, it will help us to plan for the future.

Completing the form below will allow us to thank you properly, and with your permission, enable us to keep you up to date with the work and news of the Society.

Of course, your pledge is not legally binding and you can be assured that we will keep all your information confidentially.

## Pledge Form

Title:

First name:

Surname:

Email:

Address:

Phone:

**Please select***

- ☐ I have left North East Autism Society a fixed sum of money
- ☐ I have left North East Autism Society a share of my estate
- ☐ I have left North East Autism Society a specific item
- ☐ I prefer not to answer this question

**You may wish to give further details:**

**Please select***

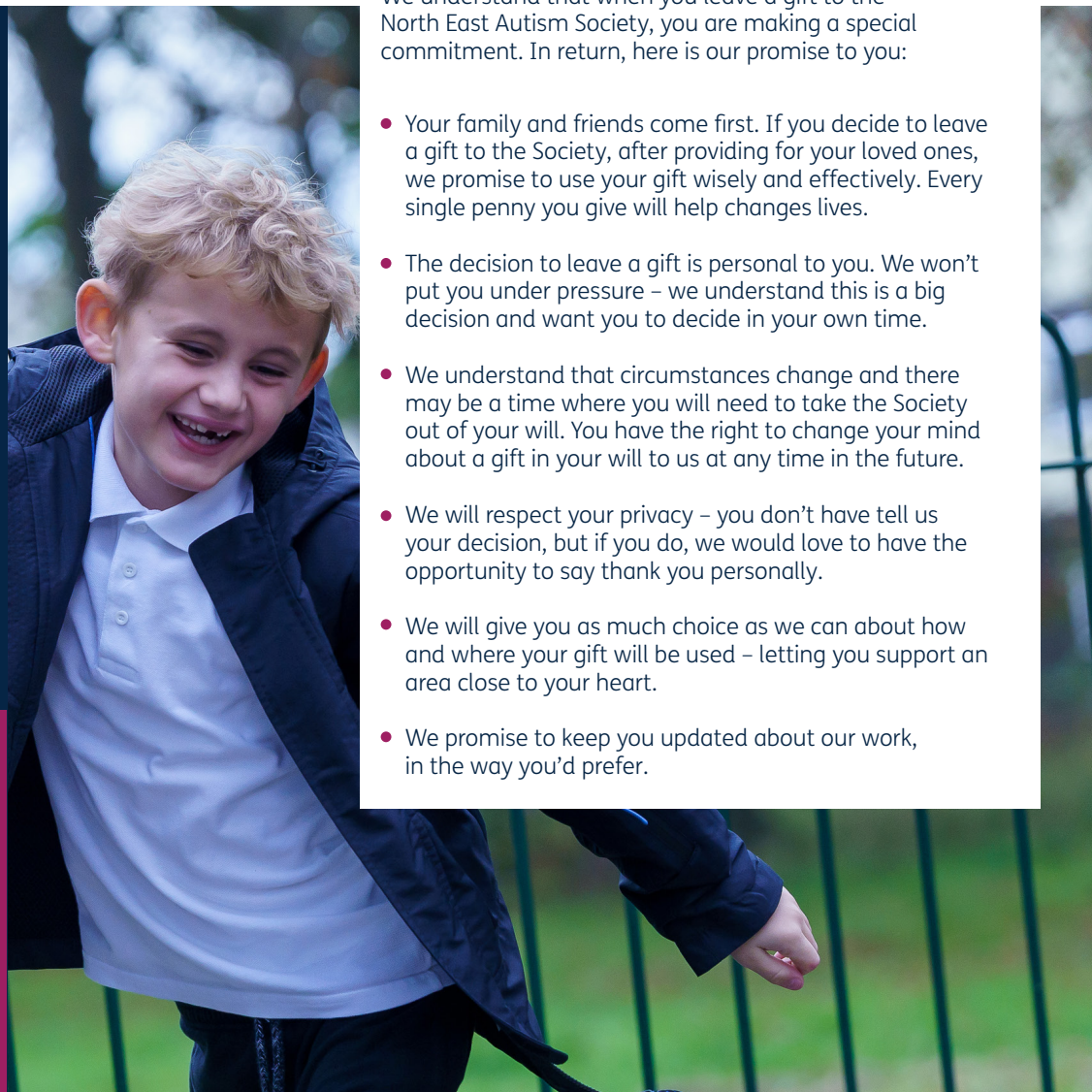
- ☐ I am happy to be contacted via email or other forms of electronic communication
- ☐ I am happy to be contacted by phone
- ☐ I am happy to be contacted by SMS
- ☐ I am happy to be contacted by post

**Signed:**

If you have already included a gift in your Will to North East Autism Society, or intend to in the future, we would very much like to hear your story and why you chose to support North East Autism Society in this special way.

We would like to share your reasons for leaving a legacy to North East Autism Society without identifying you to help inspire others to support our work. Please tick if you would rather we withhold your comments.

- ☐ **I would rather North East Autism Society withheld my comments**



# Legacy Promise

**Our promise to you:**

A gift left in a will is a promise to the children, young people and adults we support, of a better future. It promises them the support and care needed for them to reach their potential, and for their families to know they will be cared for in the future.

We understand that when you leave a gift to the North East Autism Society, you are making a special commitment. In return, here is our promise to you:

- Your family and friends come first. If you decide to leave a gift to the Society, after providing for your loved ones, we promise to use your gift wisely and effectively. Every single penny you give will help changes lives.
- The decision to leave a gift is personal to you. We won't put you under pressure – we understand this is a big decision and want you to decide in your own time.
- We understand that circumstances change and there may be a time where you will need to take the Society out of your will. You have the right to change your mind about a gift in your will to us at any time in the future.
- We will respect your privacy – you don't have tell us your decision, but if you do, we would love to have the opportunity to say thank you personally.
- We will give you as much choice as we can about how and where your gift will be used – letting you support an area close to your heart.
- We promise to keep you updated about our work, in the way you'd prefer.

# FAQS

## What is a Legacy?
A legacy is a gift left in a Will to a person, charity or other organisation. There is no limit on the size; it can be large or small. Every gift makes a big difference.

## Do I have to be wealthy to leave a gift?
Not at all. Services and activities can be paid for by a gift, or many smaller gifts left in Wills. Gifts in Wills can also pay for many other things – equipment, training, fuel for outings. Whatever you decide to gift, you can make a real difference to the lives of the people we support.

## Why a gift in a Will?
Making a Will can give you and your family peace of mind, and ensure your wishes for your loved ones are fulfilled. It can also allow you to support the causes most important to you, perhaps beyond what is possible during your lifetime.

Gifts to charity in your Will are also tax-free. If you leave a gift in your Will to NEAS, it will be deducted from the value of your estate before HM Revenue & customs calculates how much inheritance tax, if any, is payable. This can make it a cost-effective way of giving.

A gift in a Will can help us to plan and continue our work in the future. A gift of any size can make a big impact on the people we support.

## What types of gift can I leave?
There are three main ways you can leave a gift:

Residuary – leave a share in, or all of, what is left of the value of your estate after you have provided for family and friends. The advantage of leaving a share is that it stays the same over time and you won't need to change your Will to keep up with inflation.
Pecuniary – a set sum of money. You can index link your gift if you wish, to stop it losing value over time.
Specific – This is an item you wish to leave and could be anything from jewellery, a piece of art, to a house.

## Suggested wording
**Your solicitor will be able to word a gift for you, but you may also find the following suggestions helpful.**

### A share of your estate (a 'residuary' gift):
I leave _____ per cent of the residue of my real and personal estate to the North East Autism Society, 15 Lumley Court, Drum Industrial Estate, Chester le Street, DH2 1AN, registered charity number: 1028260.

### A gift of money (a 'pecuniary' gift):
I leave the sum of _____ (in words) pounds £_____ (in figures) to the North East Autism Society, 15 Lumley Court, Drum Industrial Estate, Chester le Street, DH2 1AN, registered charity number: 1028260.

### A gift of an item (a 'specific' gift):
I leave _____ to the North East Autism Society, 15 Lumley Court, Drum Industrial Estate, Chester le Street, DH2 1AN, registered charity number: 1028260.

We suggest that you always get help from a solicitor to ensure your wishes for your family and any charities you support will be clearly understood and recorded correctly.

## I have left a gift in my will, should I tell you?
If you feel comfortable in telling us, we would love to know who our generous supporters are. It gives us the opportunity to acknowledge the important decision you have made. Letting us know also helps us to plan for the future and keep you informed about our work. You can complete the pledge form in this pack to let us know your plans.

## What if I change my mind?
Letting us know you plan to leave a legacy gift does not commit you to doing so. You are free to change your mind at any time. It would be really helpful though, if you tell us you have changed your mind

## Can leaving a gift to charity help me pay less tax?
Gifts to UK registered charities are exempt from Inheritance Tax. In some cases, having a Will can help to reduce the amount of inheritance tax that needs to be paid from your estate.

Gifts between spouses or civil partners, and gifts to charity are tax-free. And gifts to charity have further benefits: instead of paying 40% inheritance tax on your taxable estate, if you leave 10% or more of your estate to charity, inheritance tax is paid at a reduced rate of 36%. This can leave more money available for the people and causes you care about. We recommend that you speak to a solicitor for advice on tax issues.



# Contact

Please get in touch if you would like to know more about leaving a gift, or to find out more about the difference a gift can make; we are here to help. We always recommend seeing a solicitor if you're thinking of writing your Will but we can help with any questions you might have.

**Please call us on 0191 410 9974 or email legacyinfo@ne-as.org.uk**

**www.ne-as.org.uk**

north east autism society

North East Autism Society
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