

# Leaving a gift in your will

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**Thank you for considering leaving a gift to Age UK Norfolk in your will and helping to make Norfolk a great place to grow older.**

We would be delighted if you felt able to leave us a gift in your Will after you've taken care of the people closest to you. By doing this you would be leaving a lasting legacy, so that no matter what challenges lay ahead, we can be there for future generations of older people and their carers living in Norfolk.

## **Leaving a gift to Age UK Norfolk in your will could make all the difference**

When you leave a gift in your will (also known as a legacy) you can continue to support a cause close to your heart. You are in complete control of how much you choose to give and whatever the size of your gift; you will be helping us to support older people in Norfolk.

## **How we help**

We enable older people in Norfolk to enjoy the opportunities and meet the challenges of later life through the provision of our vital services which include:

- Telephone Befriending Service
- Our information and advice help line
- Outreach information and advice; bringing services to people in their communities
- Benefit take up service; including free benefit checks and practical assistance with benefit applications
- Money Matters service; assisting older people with the management of their household finances and budgeting
- Norfolk Advocacy; providing support for people over 50 who are most vulnerable or in vulnerable situations to make informed decisions affecting their lives
- Bereavement Advocacy; offering practical help and support to a person in later life who has been recently bereaved and has a limited support network.

- Care Home Finder Service; a dedicated website regularly updated with current care home vacancies across Norfolk

## **How We Help: Vivien's Story**

Vivien\* first came to use Age UK Norfolk's Telephone Befriending Service after hearing of the death of her first husband, whom she was very fond of. His death triggered memories of times gone by and Vivien felt she needed somebody to talk to.

Towards the end of the COVID-19 lockdown period, Vivien developed an ulcer on her heel that now requires regular dressing. In view of its location she cannot go out to the shops or round the village as walking is painful. Vivien feels as if lockdown has continued for her.

A few weeks ago, the situation had gradually escalated to the point when Vivien's Telephone Befriending Volunteer, Marie, found that Vivien was in tears when she called her. In six years of knowing Vivien, Marie has found that she has always presented as strong and confident with firm opinions.

"Everything she felt during our phone call she shared with me. I contacted the Age UK Norfolk Befriending team and was given advice on Vivien's next steps, together with the Information and Advice Help Line number," says Marie.

Vivien was contacted by Age UK Norfolk's Information and Advice team within a couple of days. By the following week she had been given some medication by her doctor and received a phone call regarding a list of local care support.

Vivien chose the nearest care available to her and as a result now has weekly cleaning, bed changing and others tasks when needed. Vivien is full of praise for the speed in which everyone responded after the Information and Advice team had set things in motion. Vivien also received a follow up call to see if further help is needed.

Marie says, "Vivien feels so much better now. Her words were 'You've been my lifeline'. She asks me to pass on her grateful thanks to the Age UK Norfolk Information and Advice team."

\*Names changed to protect identities

## **Making your will**

If you are in the early stages of making your will, Age UK National have a helpful guide to making your will which you can download from their website on the Factsheets page: [https://www.ageuk.org.uk/services/information-advice/guides-and-factsheets/?gclid=EAIaIQobChMImbH57c696wIVj-J3Ch3IWwYuEAAYASAAEgIstvD\\_BwE](https://www.ageuk.org.uk/services/information-advice/guides-and-factsheets/?gclid=EAIaIQobChMImbH57c696wIVj-J3Ch3IWwYuEAAYASAAEgIstvD_BwE)

Our advice team can also help you find out about solicitors across Norfolk. We always recommend that your will is drafted by a qualified professional such as a solicitor as their businesses are regulated by law.

**You can reach our information and advice help line on 0300 500 1217 or by emailing [advice@ageuknorfolk.org.uk](mailto:advice@ageuknorfolk.org.uk)**

## **Leaving a gift**

If you choose to leave a gift in your will, there are three main types of gift that you can make:

- Residuary – a share in, or all of, what's left of the value of your estate after family and friends have been taken care of
- Pecuniary – a specific sum of money
- Specific – an item such as jewellery or a piece of art

To help assist your solicitor when drawing up or amending your will, we have created some suggested legal wording to include your gift to help our vital work.

### **Wording for a residuary gift**

I give the residue of my estate to Age UK Norfolk, The Elms Business Space, 7 The Elms, St Faith's Road, Old Catton, Norwich, Norfolk, NR6 7BP (Registered Charity Number 1077097) for its general charitable purposes. I further direct that the receipt of the Chief Executive or other proper officer of the said charity for the time being shall be a full and sufficient discharge for the said gift.

### **Wording for a gift of money or item**

I give the sum of £\_\_\_\_\_ (or the item specified) to Age UK Norfolk, The Elms Business Space, 7 The Elms, St Faith's Road, Old Catton, Norwich, Norfolk, NR6 7BP (Registered Charity Number 1077097) for its general charitable purposes. I further direct that the receipt of the Chief Executive or other proper officer of the said charity for the time being shall be a full and sufficient discharge for the said gift.

## **Letting us know you have left a gift**

If you leave a gift to Age UK Norfolk in your will and want to let us know about it, we can say thank you for your generous gesture. Naturally, anything that you share with us will be kept confidential at all times.

**To let us know about your gift, please contact our office on 01603 787 111 or email [fundraising@ageuknorfolk.org.uk](mailto:fundraising@ageuknorfolk.org.uk)**

## **Our Legacy Promise to you**

If you are thinking about leaving Age UK Norfolk a legacy, we are happy to answer any questions that you might have and we promise you:

- We understand that your family and loved ones come first.
- We respect your privacy and will not ask about your decision, the size or type of your gift.
- We do not expect you to tell us if you have left a gift.
- We will keep you in touch with our activities in the way that you request or not at all if this is your preference.
- We will use your gift wisely and cost effectively, so that it has the greatest impact for older people and their carers in Norfolk.
- We recognise that you have the right to change your will at any time.
- If you choose to tell us about your gift we will say thank you.

## **Useful resources**

- Age UK Norfolk Information and Advice Help Line T: 0300 500 1217  
E: [advice@ageuknorfolk.org.uk](mailto:advice@ageuknorfolk.org.uk)
- Age UK's Making Your Will Factsheet:  
[https://www.ageuk.org.uk/globalassets/age-uk/documents/factsheets/fs7\\_making\\_a\\_will\\_fcs.pdf](https://www.ageuk.org.uk/globalassets/age-uk/documents/factsheets/fs7_making_a_will_fcs.pdf)
- The Law Society website: <https://www.lawsociety.org.uk/>