

Making a will

Take charge of your future. Protect the people and causes you care about.

Making a will is one of the most positive and empowering steps you can take. It ensures your wishes are honoured and gives real peace of mind to the people you love. We would always recommend that you speak to a qualified professional, such as a solicitor, when making your will.

Why make a will?

- It puts you in control of who receives your money, property and possessions
- You can name guardians for children or dependents
- It reduces stress and uncertainty for your family
- Your wishes are clear, legally recognised and easy to follow

If you don't make a will

The law will decide who inherits your estate.

This can mean:

- People close to you may receive nothing
- Unmarried partners and stepchildren may not be included
- Family may face delays, additional costs and unnecessary worry

A will ensures your choices are respected.

For a fairer later life

How do I make a will?

Using a solicitor

A solicitor provides expert, personalised advice and ensures your will is legally valid - especially helpful if your circumstances are more complex.

Free Wills Month

Free Wills Month runs every March and October for people over 55. Many charities take part in Free Wills Month or similar initiatives. These give you the chance to create a simple will with a solicitor at no cost, with the option to leave a gift if you wish.

 www.freewillsmoonth.org.uk


Writing your own will

If you do write your own will, follow legal requirements carefully or seek advice.

Will Aid

Will Aid runs every November. There is no age restriction, but you will be asked to make a donation to support the work of the charities that part in the scheme.

 www.willaid.org.uk

 0300 0309 558

What should I include in my will?

A clear, well-thought out will usually covers:

- Who will deal with your estate after your death
- Who you want to inherit your estate
- Any specific gifts to particular people (items of sentimental importance, money, donations to charity)
- Who receives the remainder of your estate
- What you want to happen if any of your beneficiaries should die before you
- Whether you want to leave any money to charity
- Optional funeral wishes

It's important that you're as clear as possible about your wishes.

Choosing executors

Executors carry out your wishes. You can appoint a maximum of 4 executors. Choose people who are:

- Trustworthy
- Responsible
- Willing and able to take on the role

Many people appoint two executors, often a mix of family, friends or a professional.

Make sure you sign your will in the presence of 2 independent witnesses, who must also sign it. Beneficiaries of the will cannot act as a witness.

Leaving a gift to charity

Many people choose to leave a legacy to a cause close to their heart. You can leave:

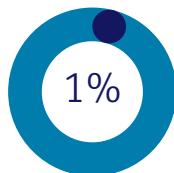
- Residuary gifts - a % of what remains after other gifts and costs are paid
- Pecuniary gifts - a fixed sum of money
- Specific gifts - items such as property, shares or valuables

By leaving a gift to Age UK Oxfordshire, you would make a difference right here in the community. Your legacy will help ensure older people live with dignity, not disadvantage; that those facing illness or disability receive the support they need; and that no one has to face loneliness alone.

Every legacy, large or small, helps create a better Oxfordshire for older people now and for generations to come.

After taking care of loved ones, leaving just 1% of your estate can create a lasting impact, while the other 99% still goes exactly where you want.


**A tiny fraction
A lasting legacy**



Information resources

Age UK Oxfordshire

 www.ageuk.org.uk/oxfordshire


 0345 450 1276

 legacies@ageukoxfordshire.org.uk

Association of Lifetime Lawyers

Legal professionals who specialise in supporting older and vulnerable people, their families and carers


 <https://lifetimelawyers.org.uk>

 020 8234 6168

Law Society of England and Wales

Representative body for solicitors, providing information on legal issues, including making a will. You can use the 'find a solicitor' search tool on their website.


 <http://solicitors.lawsociety.org.uk>


 020 7320 5757

This information guide has been prepared by Age UK Oxfordshire and includes general advice only which we hope will be of use to you. Nothing in this guide should be construed as the giving of specific advice and it should not be relied on as a basis for any decision or action. Neither Age UK Oxfordshire or its partner charities accepts any liability arising from its use. We aim to ensure the information is as up to date and accurate as possible, but please be warned that certain areas are subject to change from time to time.

Citizens Advice

Network of centres offering free, confidential and independent advice


 www.citizensadvice.org.uk

 0800 144 8848

Mencap

Contact them for advice about leaving money to a beneficiary with care and support needs

 www.mencap.org.uk/willsandtrusts

 020 7696 6925

Solicitors Regulation Authority

Independent regulatory body of the Law Society of England and Wales

 www.sra.org.uk