

# LEAVE YOUR LEGACY



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# Did you know that leaving a legacy to Age UK West Cumbria instead of Age UK National ensures that your money stays in your local area?

With your legacy of kindness, we can continue our vital work throughout West Cumbria to provide older

people with the quality of care and services to make later life as comfortable as possible.



Legacies make up almost 50% of all donations to Age UK West Cumbria.

Every single gift is vital to Age UK West Cumbria and we appreciate any gift you may choose to leave us after taking care of your family and friends.





During the COVID Pandemic, Age UK Volunteers and staff regularly visited Alan, a former teacher from Whitehaven as part of an emergency food drop off scheme. This small act of kindness helped Alan get access to basic food supplies when he most needed it.

Sadly, Alan passed away during the following year, and we remained in contact with him until the end of his life. Just over a year after Alan's passing, the team at Age UK West Cumbria discovered that he had named the charity as a residuary benefactor to a part of his estate. Looking forward, this money will help to fund a significant programme of work, helping dozens of people who face similar challenges as Alan did in later life. Alan's simple act of kindness was inspired by his personal experience of needing a little help, and his legacy will impact many lives, just as he did during his working life as an educator.

# What kind of gifts can you leave to Age UK West Cumbria?

There are 3 types of gifts you can leave in your will to Age UK West Cumbria:

- **Residuary gift** is a percentage of your estate once any specified gifts have been made to friends and family. Many of our supporters choose to leave this type of gift because it does not lose value over time and they can ensure that their loved ones are well-looked after first and foremost.
- **Pecuniary gift** is a specific amount of money. It's worth bearing in mind that the effects of inflation mean that this type of gift is likely to lose value over time and may end up being less than you initially intend.
- **Specific gift** is a gift of a specified item – such as a personal possession, land, buildings or stocks and shares.

# Writing or making changes to your will can be easier than you may think...

Leaving a gift in your will to Age UK couldn't be simpler. You can make sure your loved ones are looked after first and foremost as well as helping to ensure that Age UK West Cumbria can be on hand to provide older people with the support, comfort and dignity they need for years to come.

- When making your will, it's good to start by drawing up a complete list of your assets and debts and then make a list of all the people and good causes you want to benefit from your will.
- When you come to write or amend your will, we recommend using a solicitor who can help make sure that your wishes will be followed.
- Amending an existing will to include a gift to Age UK West Cumbria is relatively straightforward. Your solicitor can draft an amendment (called a codicil) for a minimal cost.

- If you're amending or making your will to include a gift to Age UK West Cumbria, please use the suggested wording, which you will find on page 7. You can also find information about the different types of gift on page 4.
- Finally, if you are leaving a gift to Age UK West Cumbria – then thank you so much. Whatever the size of your gift, it could make an enormous difference to older people in years to come.



# What to write in your will if you are leaving a gift to Age UK West Cumbria

To make sure that Age UK West Cumbria receives your gift, it's advisable to use the recommended wording below:

## For a residuary gift:

'I give the residue of my estate to Age UK West Cumbria, The Bradbury Independent Living Centre, Oxford Street, Workington, CA14 2AL (Registered Charity Number 1122049) 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.'

## For a pecuniary / specific gift:

'I give the sum of £\_\_\_ (or the item specified) to Age UK West Cumbria, The Bradbury Independent Living Centre, Oxford Street, Workington, CA14 2AL (Registered Charity Number 1122049) 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.'





Thank you so much for considering leaving a gift in your will to Age UK. Your kindness could help make sure that we can be there to give vital support to older people for many years to come.

**Everybody deserves to love later life.**

Age UK West Cumbria working in partnership with Age UK. Age UK West Cumbria HQ - Bradbury Independent Living Centre, Oxford Street, Workington, Cumbria, CA14 2AL. Registered Charity Number 1122049. Company Number 10071103. VAT Registration Number 473325547. © Age UK West Cumbria 2022. All rights reserved.