

# I Will for Whittington

How to leave a gift in your Will  
to Whittington Health



The  
Whittington Hospital  
Charitable Funds 

# Leaving a Gift in your Will

A professionally written, up-to-date Will is the only way to make sure the people and causes you care about the most are looked after.

## Who we are

Whittington Health NHS Trust provides hospital and community care services to 500,000 people living in Islington and Haringey as well as other London boroughs including Barnet, Enfield, Camden and Hackney. As an Integrated Care Organisation providing both hospital and community services, we deliver healthcare on the acute hospital site, and through a variety of other channels including visits to patients' homes.

## Supporting your health care services

Whittington Hospital Charitable Funds raises funds to help enhance education, equipment and facilities across Whittington Health NHS for the benefit of all our patients, visitors, colleagues and the wider community.

Once you've considered all the important people in your life, any legacy you leave us regardless of size will help us help local people live longer and healthier lives.



The original  
Whittington  
Hospital building.

## Leave a legacy and be part of your local heritage

Medical services have been delivered on the Whittington site since 1473, when a leper hospital was founded. In 1848, a new hospital was built on the St Mary's site, to care for patients with smallpox during the period of epidemic.

Independently managed hospitals were opened on the Highgate site in 1866 and the Archway site in 1877. In 1900, Highgate Hill Infirmary opened adjacent to the Smallpox and Vaccination Hospital.

The two hospitals soon amalgamated, and the Smallpox Hospital was transformed into a nurses' home. In 1946, the hospitals on all three sites were brought together. With the coming of the National Health Service in 1948, they jointly became The Whittington Hospital and began to modernise.



## Which department, service or ward should you support?

Often supporters leave a legacy to a ward or service that has helped them or a loved one through a challenging period in their life.

As an Integrated Care Organisation providing a range of services, legacies have been bequeathed to various departments such as Children's, Cardiac, Intensive Care and also to the General Fund.

A legacy to a specific part of Whittington Health will be ring fenced to help enhance that particular service of choice whilst legacies to the General Fund can be applied across our organisation helping enhance services for even more patients and the wider community.

Whichever part of the organisation you choose to leave a legacy to, you can be assured you will be making the gift of a lifetime that will change lives.



## “The staff have been fantastic in looking after my son...”

Nancy has been bringing her son to the Whittington since his diagnosis with epilepsy when he was 4 years old:

“We recently moved into a new house and this prompted us to review our paperwork, including our Wills. My solicitor mentioned that leaving a legacy to a charity has tax advantages, especially if the estate is worth more than the current tax threshold.”

“Over the years, I’ve had so much support from Whittington Health and its staff – if A&E or the wonderful Children’s Ward hadn’t been there, I don’t know how my family would have coped. So, I decided to leave a residuary gift to The Whittington Hospital so that in the future, more families like mine can also benefit from The Whittington Hospital’s invaluable work.”



# Writing your Will

It is not difficult or expensive to write a Will yourself or with a solicitor.

After deciding who and what you would like to include in your Will, you should decide whether you are leaving a residue (residuary), monetary (pecuniary) or specific legacy or a combination.

## Residuary legacy

This is a gift to charity that is left from your estate when all debts, charges and other gifts have been deducted. After making specific and monetary gifts a percentage can be left to one or more individuals or charities. As it is a percentage it ensures that your loved ones are taken care of and you won't have to keep changing your Will as circumstances change. This is a particularly popular way to leave a gift to a charity.

### **Wording for a residuary legacy (a percentage of your estate)**

I give \_\_\_\_\_% of the residue of my real and personal estate which I can dispose of by Will in any manner I think proper to the Whittington Hospital Charitable Funds (Registered Charity No 1056452) of Magdala Avenue, London, N19 5NF and the receipt of the Director of Finance or the proper officer for the time being of the Whittington Hospital Charitable Funds shall be a complete discharge to my Executors.

## Pecuniary, monetary or cash legacy

This is a fixed amount of money, such as £20,000 and is also referred to as a pecuniary gift.

### Wording for a pecuniary legacy (a set sum or pecuniary gift)

I give the sum of £ \_\_\_\_\_ to the Whittington Hospital Charitable Funds (Registered Charity No 105642) of Magdala Avenue, London, N19 5NF and the receipt of the Director of Finance or other proper officer for the time being of the Whittington Hospital Charitable Funds shall be a complete discharge to my Executors.

Whichever sort of legacy you decide to leave, it is important to ensure that the following clause is inserted:

If at my death any charity named as a beneficiary in this Will or Codicil hereto has changed its name or amalgamated with or transferred its assets to another body then my Executors shall give effect to any gift made to such charity as if it had been made (in the first case) to the body in its changed name or (in the second place) to the body which results from such amalgamation or to which such transfer has been made.

## Specific legacy

This is a gift of a particular item such as an item of jewellery or furniture, or even a gift of shares.

Forms are available from some Post Offices or high street stationers and it is advisable, especially if your wishes are not straightforward, to consult a solicitor.

Using a solicitor or Will service, ensures that your Will is legally valid. Visit <http://solicitors.lawsociety.org.uk> to find a local solicitor.

# How your legacy could be spent...

In an effort to improve the experience of patients who spend the night, the charity purchased a range of items to reduce the effects of noise and light in our wards.

As a result of charitable donations, every patient who stays overnight will now be offered earplugs, eye masks and headphones to use with the hospital TVs.

The charity also purchased noise monitors and desk lamps for every ward, to ensure all our patients receive the best possible night's sleep.



## What are the tax advantages in writing a Will?

Leaving a gift to charity in your Will can have tax benefits. Currently, Inheritance Tax is charged at two rates:

- 1** 0% applies to the value of your estate up to £325,000.
- 2** 40% then applies to the value over the £325,000 threshold.

The estate can pay Inheritance Tax at a reduced rate of 36% on some assets if you leave 10% or more of the net value to charity.

## Helpful steps in preparing your Will



**Write a list of all your assets and liabilities to estimate the value of your estate**

This will also help you to assess if you need further advice on inheritance tax planning if your total estate is above the threshold.



**Write a list of all the people and charities you would like to benefit from your Will.**

Including full names and addresses.



**Select a solicitor or bank to draft your Will.**



**Select an executor for your Will.**

You will need at least one person. They will be responsible for making sure your Will is carried out. You can select a solicitor or ask a family member or close friend.



**Your Will must be signed in the presence of two witnesses.**

To be legally binding, your Will must be signed in the presence of two witnesses, who must then sign it themselves. They or their spouses must not be beneficiaries.



**Keep your Will safe.**

One good way of doing this is to entrust it to your solicitor or bank manager. Some people send a copy to the beneficiary charity for their records in case the original is lost or disputed.

## Please let us know if you are including Whittington Health in your Will

We would like to thank you for your legacy pledge and let you know how you will be making a real difference for patients, their families and the community for years to come.

If you need a large print, audio or translated copy of this leaflet please contact us on 020 7288 3402.

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