

**autism together**  
REMEMBER A CHARITY  
IN YOUR WILL WEEK



**Leave a legacy**

And help us create a better future

# Why leave a gift to **Autism Together** in your will?

**M**any people feel uncomfortable discussing the subject of wills and legacies, but they are so important, both for the peace of mind of the person making them, and for charities like ours who are so often remembered in them.

For most people, leaving a legacy will be the greatest contribution they ever make to the support of a charity, and one that will create a lasting difference for years to come. It stands as a true and enduring legacy to those left behind.

Remember, any donation, however big or small, can make a huge difference.





## Our Vision

A better life for people with autism.

## Our Charity

In 1968, a group of forward-thinking parents established The Wirral Society for Autistic Children, the forerunner of our organisation. In 52 years, Autism Together has grown from providing support to a small number of people with Autism, to providing a wide range of living options, day services and community support to around 400 people from all over the UK.

## Our Mission

To help people with autism develop their full potential and achieve their aspirations by delivering high-quality, person-centred support.

## Our Values

- We promote positive communication.
- Everything we do is person-centred.
- We are an organisation that promotes learning.
- We are respectful.

## Ensure the future of our charity

### How your donation can help achieve this?

We're proud of what Autism Together has already achieved and excited about the future of our organisation. With your help, we can continue to be one of the UK's largest providers of support to people with autism, now and for generations to come.

### We have huge ambitions for the future, including:

- Expanding our day services.
- Reviewing our services to ensure they meet individuals' needs.
- Developing our Residential and Supported Living provision.
- Exploring opportunities to develop new services for people with autism

Our Fundraising Team will ensure your donation is spent in line with your wishes, to provide additional services and equipment for an organisation that has supported those with autism for over half a century.

# Why is leaving a legacy in your will so important?

## Vicki Jackson's story



Autism Together, formerly known as Wirral Autistic Society, has been an important part of the Jackson family's life since the 1970s.

Vicki Jackson, spoke to us about the importance of leaving a legacy to a cause that has meant so much to her family.

Her brother, Mark, has autism and lived at home until he was 19. With her parents finding it increasingly difficult to look after Mark at home, our organisation offered him a residential place at our Raby Hall site. This placement provided Mark with the specialist care he needed. Mark is about to turn 56 and, over the years, Raby Hall truly became his home.

Vicki explained: "Sadly my dad died in 2012 and my mum talked to me about leaving money in her will to help Autism Together to build a new home in the grounds of Raby Hall. My mum also sadly died in February 2014 and the legacy she left in her will, together with other donations, enabled work to begin on the new building (The Willows).

"This is just one example of what your money can do if you leave a legacy in your

will. Autism Together is a life-saver for many families. For Autism Together to keep these services running, and to add to their current services, it is vital they continue to raise funds – and donations and legacies are so important in this.

"You can specify in your will what the legacy is used for or you can leave it up to Autism Together to decide. For those loved ones left behind, a legacy is a lovely reminder of the person you've lost and brings some comfort that they were able to help those in need.

"There are also tax benefits for charitable legacies which can be factored into inheritance tax planning. Please have a think about whether this is something you would like to do. It is an amazing gift to give."



# Some points to think about

## Inheritance Tax

Inheritance tax is a concern many people have when planning for their wills. If you are concerned, visit: [www.gov.uk/inheritance-tax](http://www.gov.uk/inheritance-tax). Including a gift to charity may be a good way to reduce the amount of inheritance tax your estate is subject to. Any gift you leave to Autism Together or another charity will be exempt from this tax.

## Reviewing your will

It is worth reviewing your will now and again, especially at important life stages, such as when grandchildren are born as you may then wish to add them to your will.

## Funeral plans

In your will you may wish to include any funeral wishes or plans you have. Many people choose to plan for their funerals in this way so that it is one less thing for their loved ones to worry about after their passing.

## Legal advice

We recommend that if you have any questions it is a good idea to seek legal advice. Autism Together has partnered to offer free online will services with **Bequeathed** or you can pop into **McClure Solicitors** and they will provide you with a free will preparation service.

# Meet our partners...

We work with several partners to help make the process easier, guiding you through each step towards creating a will or trust that will best suit the needs of your family. There is no obligation to include a gift to Autism Together, but it will make a huge difference if you are able to.



## Bequeathed

Bequeathed allows you to make your basic will online for free, offering as much support as needed to complete your will. When you are ready, you can download and print out the will created for you, with full instructions on what to do with it next. You can also get further advice on your draft from Bequeathed's selected law firms.



## McClure Solicitors

Making a will is one of the most important things that you can do to ensure your family is taken care of when you are no longer here. With this in mind, Autism Together has also partnered with McClure Solicitors to offer a free basic will-preparation service. Please do consider making a donation or gift to our charity in your will.

DISCLAIMER - Autism Together will not be informed of any details of arrangements made, as these are of course treated as strictly confidential. Autism Together will not be liable, or held accountable, for any information or advice that you are provided with by the promoted solicitors and we do not endorse products or businesses. You are entitled to and should take or obtain advice from a solicitor, whether promoted or not. Please ensure you discuss your requirements fully with your chosen solicitor to ensure your needs are met.

# Get all your ducks in a row

Use our handy planner to help you prepare your will

This planner should help you collect all the information you need to make a will, making things much easier when you come to create your own will online or when visiting a solicitor.

**Your name and address:**

---

---

**Your partner's name and address (if different from your own):**

---

---

**Executors'\* full names and addresses:**

---

---

**Children's full names and addresses (if different from your own):**

---

---

**Guardians'\* full names and addresses:**

---

---

\*See definitions of legal terms on the end of this Will Planner

# Value of your estate

Use these tables to help work out the value of your estate?

Your home (or share in it)	£ _____
Other property or land	£ _____
Cars and other vehicles	£ _____
Home contents including furniture and fittings	£ _____
Items of particular value (eg jewellery or art)	£ _____
Money in banks and building societies	£ _____
Shares, investments, National Savings, Premium Bonds, insurance and pensions	£ _____
Other savings and assets	£ _____
<b>Total assets:</b>	<b>£ _____</b>

**Remember to make a note of any specific gifts you want to leave...**

# What are your major liabilities?

Your mortgage	£ _____
Loans and overdrafts	£ _____
Your credit cards	£ _____
Credit or HP agreements	£ _____
Other liabilities	£ _____
<b>Total liabilities</b>	<b>£ _____</b>
<b>Assets - Liabilities = Total Estate Value</b>	<b>£ _____</b>

# Bequests

Make a note of any specific gifts you want to leave

**Specific Bequests (item):** Write down the full names and addresses of all individuals and charities (with registered charity numbers) you want to benefit, with a brief description of the item.

---

---

**Pecuniary Bequests (set amount of money):** Write down in full the names and addresses of all individuals and charities (with registered charity numbers) you want to benefit and the amount.

---

---

**Residuary Bequests** (a percentage or all of the residue of your estate): Write down the full names and addresses of all individuals and charities (with registered charity numbers), with their proportion of the residue of your estate.

---

---

**What do you want to happen to your bequests if any of your beneficiaries die before you do?**

---

---

On a separate sheet, please list any questions you may have for your solicitor and keep it with your Will Planner in a safe place. Note: this Will Planner cannot be used as a valid will.

# Legal Terms

Glossary of words you might need to know

**Assets** – everything that you own, including your share in assets held jointly with someone else.

**Beneficiary** – a person or organisation who will receive a gift in your will.

**Codicil** – a legal document that makes an amendment or addition to your current will.

**Estate** – your property, money and possessions.

**Executor** – someone you choose and name in your will to deal with your affairs in accordance with your will after you've died.

**Grant of Probate** – a document which confirms who is authorised to deal with your affairs after you've died.

**Guardians** – the people you choose and name in your will to look after your children in the event of your death.

**Inheritance** – when someone receives money, property or

another personal possession from the person who has died.

**Inheritance Tax (IHT)** – is a 40% tax imposed on the portion of an estate exceeding £325,000. Money left to your spouse or a charity is not taxed. If your spouse dies before you and didn't use their full IHT allowance, it will be added to yours, at the rate current when you die.

**Intestacy** – where someone dies without leaving a will. There are then legal rules governing who can deal with your estate and who benefits from it.

**Legacy or Bequest** – a gift you leave in your will to an individual or organisation.

**Liabilities** – any money that you owe or bills that must be paid from your estate.

**Probate** – the process of confirming your will is valid, identifying what you owned and any debts or liabilities

that need to be paid, then submitting an application to the Probate Registry. If everything is in order, the Probate Registry then issue a Grant of Probate.

**Pecuniary legacy** – a cash gift – this is a gift of a set sum of money.

**Residuary legacy** – a share of an estate – this is a percentage of everything you own after any pecuniary legacies, specific legacies, debts and legal fees have been paid out.

**Specific legacy** – a specific item, such as a house, car or jewellery.

**Testator/Testatrix** – the man/woman whose will is being written.

**Trusts** – where someone holds money or property on behalf of somebody else.

# How to include a gift to **Autism Together** in your Will

If you would like to leave **Autism Together** a gift, there are a few different ways you can do this...

## **A share of your estate**

You can leave part of your estate as a percentage of what is left over once loved ones are provided for.

## **Fixed sum of money**

Known as a pecuniary gift, you can choose to leave a fixed sum of money.

## **A specific item**

It can be a piece of jewellery, an antique or even a property.

A gift like this should be named in your will.

**If you decide to leave Autism Together a gift you will need to include our full details and charity number.**

Autism Together, Wirral  
Centre for Autism, Oak  
House, 6 Tebay Road,  
Bromborough, Wirral, CH62  
3PA. Registered charity  
number England and Wales  
(1007878)

If you would like to learn more about **Autism Together** and the difference your support will make, please **email:** [fundraising@autismtogether.co.uk](mailto:fundraising@autismtogether.co.uk) or **call:** 0151 482 3136.