



ABILITY · EQUALITY · INDEPENDENCE



Our guide to support you  
**writing your Will**



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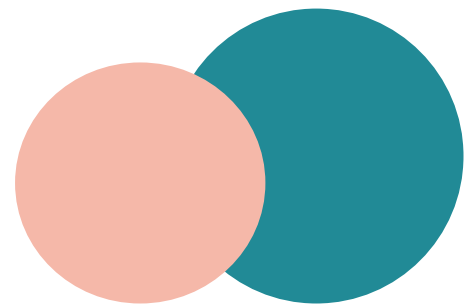
## About Us

Grace Eyre is one of the oldest and most innovative charities in the UK. For over 120 years the charity has been committed to working with people with learning disabilities, autism and/or mental health conditions.

Our aim is for each person to be able to increase their ability, to gain the independence we so freely experience, and to enable them to feel equal.

These are the people we support, approximately 600 each year. Empowering and enabling them to increase their independence and live happy, healthy lives.

Together, we're building stronger, more inclusive communities for everyone to enjoy.



### Our services include

- Active Lives: is all about people, fun, friendship and having new experiences in a safe and supported environment. Our aim is to engage, nurture and enrich the lives of those who take part.
- Choices: many people with learning disabilities and/or autism enjoy living in their own home or shared accommodation. Our supported living service provides unique support for each person's needs, so they can really enjoy living independently.
- Housing: working with lots of different landlords and housing providers we match individuals, couples and friendship groups with quality accommodation that meets their needs, enabling people to live in the security of their own home.
- Shared Lives: matching carers with people who need some additional support to provide long-term accommodation, short breaks, day share and kinship opportunities, enabling people to live and integrate fully within their community.



## How we promote ability, equality, and independence?

### Grace Eyre Housing Ability

In April 2020, Chloe and her son moved into their first own home - previously Chloe's housing background had been unsuitable and unstable.

Now a few weeks on in their home, both mother and child have settled in very well. With regular support from her Grace Eyre Housing Officer and Choices Community Support Worker, mum and son are making great progress.

Chloe said:

"I feel very happy and grateful for my new home. We have settled in really well. I have my independence now and I feel safe. I have met my new neighbours and they have been very welcoming. I have found Grace Eyre Housing really helpful and I know that I have somebody there if I need further help with my home."

Patrusha Dey, Grace Eyre Housing Officer, said:

"Thank you, Chloe. That is such a positive start, we look forward to following you on your new journey!"



### Grace Eyre Travel Buddy Project Independence



"It feels brilliant! And Mum feels brilliant as well. She feels I am getting more confident."  
Nat Connor



"It felt good to support my people, it felt like being a teacher. I want to support other people so that they can learn to travel on the bus."  
Stevie Howse

## Grace Eyre Choices Outreach Support Equality

Tony is supported through Choices by Dan.

Tony is in his early 60s and lives with his sister Sandra. He has autism and isn't always able to express his thoughts, especially when you first meet him. We became comfortable with each other quite quickly. Having seen a lot of films together, I approached Sandra with the idea of supporting him with his love of football.

I am a Chelsea fan. One of our earliest games in the season was a League Cup game at home to Grimsby Town. I checked with Sandra if it was OK to offer to take Tony and she said he would be delighted. Then on the day of the game a friend gave me free corporate tickets which was amazing! Chelsea won 7-1, it was a brilliant night, Tony enjoyed himself so much.

At football Tony really comes alive, he is far more verbal and confident than you are likely to see him anywhere else. He loves to call out and cheer on the team, laughing at other people's comments and having a great time. This whole new footballing adventure has really thrilled Tony, and his family are delighted as well.

His sister Sandra says: "He's absolutely over the moon with all the football he's going to, it's better than winning the lottery for him. If our mum could see him now, she'd be so happy for him."



## About this guide

A common concern for the parents, carers, and family members of the people we support is:

“How will my loved one be cared for when I am gone?”

This booklet is a good place to start to get some peace of mind. It's designed to guide you through the options available, some things to consider and some of the related terminology that might be new to you.

**Please remember that it's important to take professional advice before making any long-term financial and legal decisions.**

This booklet should prepare you for your meeting with a legal adviser.

It takes a bit of time to write your will but your reward will be peace of mind.

## Peace of mind

### Taking care of your family's future

“How will my loved one be cared for when I am gone?”

You know about their needs and you want to make sure those needs continue to be met after you have gone.

Making a will gives you the opportunity to have a say in the future of those you care about and make sure they're provided for. It's a really important step to take – it will make sure your money goes where you want it to and that your loved ones get the best care and provision possible.

### Providing care can be complex

Care and provision for a person with learning disabilities and/or autism can be complex, especially when means-tested benefits are involved.

A trust makes it possible for you to leave money without affecting their entitlements to means-tested benefits and to choose the people you would like to look after that money. You can read more about the different types of trust, download our Legacy Trusts.

**A gift in your will costs nothing during your lifetime, but it makes a huge difference in the future.**







## How to make your will

You might think that making a will is expensive, but it doesn't have to be. Here we help you to approach it in manageable stages. Download our Legacy Most frequently asked questions

Finding a legal adviser

Preparing for a meeting

Understanding types of gifts in a will

Keeping your will up to date

Making changes

### Finding a legal adviser

Before you make any decisions about your will, it is important to speak to a legal adviser like a qualified solicitor or a professional will writer.

You can find suitable solicitors by searching on The Law Society website; [www.lawsociety.org.uk](http://www.lawsociety.org.uk).

or The Society of Trust and Estate Practitioners (STEP) website; [www.step.org](http://www.step.org).

However you choose to find your legal professional, it is a good idea to check that they are experienced in advising about providing for someone with a disability, and to check costs before you set up a meeting.

### Preparing for a meeting

Before you meet your legal adviser, it helps to list all the information you will need, for example:

- names and addresses of the people you would like to leave money to
- names of the people you want to carry out the wishes you express in your will (executors)
- the money and other things of major value that you own (assets) and any debts (liabilities)
- names of the people you would like to manage any trusts you plan to set up (trustees)
- any gift that you would like to leave to charity, after you've provided for your loved ones.



## Understanding types of gifts in a will

Gifts in a will are also sometimes called legacies or bequests. There are three different types of gift that you can make.

A share of your estate  
A fixed sum of money  
A specific gift

Download our Legacy Types of gifts in you will.



## Keeping your will up to date

It's important to keep your will up to date. If there is any change to your circumstances, or the circumstances of the people benefitting from your will, you need to consider whether your will is still appropriate and reflects your wishes. It is a good idea to check your will every few years and change it if you need to.

## Making changes

You can make a simple change, for example the name of the person who deals with your affairs after your death (executor), in a document called a codicil. But, because nothing must be attached to your will, there is a risk that a codicil could become separated and lost and it may be safer to ask your legal adviser to make a new will. If the changes are only small, they may charge a reduced fee.

## Trusts: The options available

A trust is a legal arrangement where one or more “trustees” are made legally responsible for holding assets to benefit others. The trustees are responsible for managing the trust and carrying out the wishes of the person who has put the assets into trust. A trust is especially useful if you have a loved one who is not able to look after their finances or if any inheritance may impact their means-tested benefits.

Your solicitor or legal professional will be able to help you choose the most appropriate trust to meet your loved one’s needs and will also be able to set up the trust.

Download our summary of the different types of trusts to consider:

## Help shape the future

We are experts in changing lives for good. People, families, and professionals trust us with the most important services. From housing to supported living, work and travel, to making friends. We have the experience and dedication to be the best.

Now more than ever, people with learning disabilities and/or autism are feeling alone. We know our services and activities are a lifeline for our community. With your help, we can make sure we’re there for everyone who needs someone.

## Useful contacts

**The Law Society** – Provides information on solicitors.

Tel: 020 7320 5650

Email: [info.services@lawsociety.org.uk](mailto:info.services@lawsociety.org.uk)

Website: [www.lawsociety.org.uk](http://www.lawsociety.org.uk)

**Office of the Public Guardian** – Provides financial protection services for clients in England and Wales who are not able to manage their own financial affairs because of lack of capacity.

Tel: 0300 456 0300

Email: [customerservices@publicguardian.gsi.gov.uk](mailto:customerservices@publicguardian.gsi.gov.uk)

Website: [www.gov.uk/office-of-public-guardian](http://www.gov.uk/office-of-public-guardian)

**The Society of Trust and Estate Practitioners** – Find your local branch for legal advice and will writing services.

Tel: 020 7340 0500

Email: [step@step.org](mailto:step@step.org)

Website: [www.step.org](http://www.step.org)



## Glossary

**Assets** – Money and any other valuable things that you own, like your home, car, jewellery, and investments.

**Beneficiary** – A person who benefits from provisions made in your will.

**Codicil** – An extra document to your will, which can be read together with your will.

**Dependant** – A person who depends on you for financial support because they are a child, or they have particular needs.

**Estate** – The sum of the money, property, and other assets that you are leaving in your will.

**Executor** – A person responsible for dealing with the administration of your estate, including paying your bills, selling your assets, and carrying out the requests you make in your will.

**Inheritance Tax** – A tax that is charged on the value of everything you own after your death. For more information visit [www.hmrc.gov.uk/inheritancetax](http://www.hmrc.gov.uk/inheritancetax).

**Legacy (or Bequest)** – A gift of a sum of money or a particular item left in your will to a particular person or organisation.

**Letter of wishes** – An informal letter to your executors, signed and dated by you, where you can give more detail on the instructions in your will. It should be kept with your will.

**Liabilities** – Anything you owe, like mortgages, loans, and any other debts you may have.

**Trust** – A legal arrangement that allows a person or organisation to look after someone else's money.

**Trustee** – A person responsible for managing a trust.

**Will** – A legal document that gives instructions about what should happen to your money and possessions after you die. It needs to be signed, dated and witnessed by two people.



Now more than ever, people with learning disabilities and/or autism are feeling alone.

We know our services and activities are a lifeline for our community. With your help, we can make sure we're there for everyone who needs someone.

We want everyone to support us, because we all win when we're all in.



For any general enquiries:  
The Grace Eyre Foundation  
36 Montefiore Road, Hove, East Sussex, BN3 6EP  
Telephone: 01273 201900  
Email: [enquiries@grace-eyre.org](mailto:enquiries@grace-eyre.org)  
Website: [www.grace-eyre.org](http://www.grace-eyre.org)

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