



Where there's a will, there's a way

A guide to supporting Grace Eyre in your will





Your legacy, our future

At Grace Eyre we are dedicated to empowering and enabling people with a learning disability and autistic people to live their lives the way they want to.

Grace Eyre is one of the oldest and most innovative charities in Brighton and Hove. Our vision is for the people we support to be treated and respected as equal citizens and to be valued members of and contributors to their communities.

We have been supporting people to increase their ability, equality and independence since 1898. By leaving a gift in your will, your generosity today can help us continue to make a difference tomorrow and in the future.

Making or updating a will is fairly straightforward, but we know that leaving a gift in your will is a big decision. We are honoured that you are considering leaving a legacy to Grace Eyre and hope that this guide is a simple introduction to the things you need to consider.

If you have any questions, or would like to talk anything through, please contact our Fundraising Team - they're here to help.

Every gift, however big or small, will help the people we support to nurture their ability, feel more equal in their community and to grow their independence. Thank you for choosing to support Grace Eyre.

Eva Eriksson, Chief Executive

The importance of your legacy

Our work is inspired by the pioneering vision of our founder, Grace Eyre Woodhead. She formed the Guardianship Society in 1898 with the belief that everyone deserves "a place in the sun". She worked tirelessly for people with a learning disability to have greater freedom and to be given the opportunities to play an active and equal role within their communities. The Grace Eyre Foundation is her legacy.

Today we support over 600 adults with a learning disability and autistic people across Sussex every year. We offer person-centred one-to-one support, community outreach services, supported living and housing services and a wide range of personal and skills development activities, courses and projects.

As a charity, we rely on the kindness and generosity of people like you to be able to offer projects such as Employability and Travel Buddy. Your legacy, no matter how big or small, will make a huge contribution to projects such as these that transform people's lives, increasing their ability, equality and independence so they can live fulfilled, happy and healthy lives.

Your life journey can help people like Holly on theirs

Holly joined the Travel Buddy project because she wanted to travel independently to and from work. She was nervous about using the bus. Interacting with the public, the driver, and navigating the ticket system all seemed impossible and she often froze when it was her turn to board. With the support of her Travel Buddy, Holly created a communication wheel to show the driver if she had trouble speaking and devised coping mechanisms to overcome this. As a result of the Travel Buddy project, Holly not only travels to and from work, she also goes on longer journeys, helps friends with their travelling and has been important in helping Brighton & Hove Buses train their staff. Holly's independence and doors to other opportunities have been opened thanks to the generosity of our supporters.



Types of gifts in your will

Gifts in a will are also called legacies or bequests. There are different types of gifts that you can make:

A share of your estate

This is usually known as a residuary gift. Once you have decided what you would like to leave to your loved ones, a residuary gift means you leave a percentage of what is left to other people or charities such as Grace Eyre. It can be anywhere between 1% and 100%, it is entirely up to you. The good thing about this type of gift is that it keeps pace with inflation because it is a proportion of your estate. No matter the size of the percentage, it all makes an enormous difference to the people we support.

A fixed sum

This is known as a pecuniary gift and is a set figure of money that you decide upon. Inflation can reduce the value of this type of gift, so it is worth reviewing the amount from time to time to ensure it is still worth what you intended to give.

A specific gift

This is a specific named item(s) of value such as property, jewellery, land, art, antiques, etc.

Your gift can forge a path for the future for people like Nathaniel

Nathaniel was referred to the Employability project by the Prince's Trust. His autism and severe anxiety created a barrier to maintaining employment. "In some work environments I wasn't able to operate, noise and chaos and other staff not being very supportive made it hard for me to focus." Supported by his Job Coach, Nathaniel found that small and simple adjustments helped to reduce his anxiety. He also learned how to apply and prepare for interviews.



Today, as a result of the project which is funded by our supporters, Nathaniel is Grace Eyre's Director of Inclusion and Projects, responsible for ensuring that people with a learning disability and autistic people are afforded equal opportunities and supported to fulfil their aims and ambitions. "The Employment Project gave me new life. I am proud to have started my new life and my new career through the project. New doorways to finding confidence, belonging and opportunity in our lives keep being added to by this remarkable employment team."

Making a will

Understanding the process and preparing for meeting with a professional advisor

Making a will and keeping it up to date is the only way you can be sure your wishes will be taken care of properly in the future. It's fairly straightforward to put a will together and doesn't need to be expensive. Do-it-yourself wills are an inexpensive option, but they're not always watertight, which can cause complications and lead to unexpected costs further down the line. At Grace Eyre we recommend using a professional advisor, like a solicitor, to make sure your will is written properly and meets your unique requirements.

Did you know?

Leaving a gift to charity, like Grace Eyre, can have tax advantages. To find out more, we recommend you speak to a solicitor or professional advisor.

Finding a legal advisor

The Law Society and The Society of Trust and Estate Practitioners websites are a great place to start. An online search for solicitors in your area may also be fruitful, just check they offer a will writing service and check their costs/fees.

The Law Society
Tel: 020 7320 5650
Email: info.services@lawsociety.org.uk
Website: www.lawsociety.org.uk

The Society of Trust &
Estate Practitioners
Tel: 020 7340 0500
Email: step@step.org
Website: www.step.org

If you are based in the Brighton & Hove area, we recommend Renaissance Legal. They are an affordable, award-winning firm who specialise in working with families and carers of disabled and vulnerable individuals, helping them plan effectively for the future with Wills, Trusts, Powers of Attorney, Court of Protection applications and Inheritance Tax Planning.

Renaissance Legal
Tel: 01273 610611
Email: info@renaissancelegal.co.uk
Website: [/www.renaissancelegal.co.uk](http://www.renaissancelegal.co.uk)

Preparing for your meeting with a legal advisor

Before you meet with your legal adviser it helps to gather the information they are likely to ask for, such as:

- Names and addresses of the people and/or charities you would like to leave gifts to. If you choose to name the Grace Eyre Foundation as a beneficiary, you will need our registered charity number (1020192).
- Names and addresses of your will's executors. These are the people you want to carry out the wishes you express in your will.
- Information about your asset's liabilities. These are the money and things of major value that you own and any significant debt you may have.
- Information about what you would specifically like to leave to Grace Eyre e.g. a share of your estate, a fixed sum or a specific item.

Making changes to your will

It's important to keep your will up to date. If there are any changes to your circumstances, or the circumstances of the people benefiting from your will, you will need to consider whether your will is still appropriate and reflects your wishes. 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 should 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.



Frequently Asked Questions

Is making or changing a will expensive?

There is no requirement to have any legal qualifications or knowledge to be able to write a will, you can even buy kits to make them at home. Consequently, there is a vast difference in the service you will receive and the protection and redress available to you if there is a problem.

We always recommend getting professional legal advice about writing your will. Look for those professionals who are a member of The Society of Trust and Estate Practitioners or a member of the Institute of Professional Will Writers to make sure they have specialist knowledge. Most solicitors make every effort to ensure that the cost of preparing a will is kept as reasonable as possible.

What is the difference between a will and a trust, and do I need both?

A will is a legal document that distributes your estate on your death and only comes into force at the time of your death. A trust protects the assets placed in it for the people you want to benefit. If you have a loved one with a learning disability and/or autism and you would like to ensure they are financially protected long into the future, it is a good idea to have both.

A trust can be in your will or a separate document. The need for a separate lifetime trust will depend on your assets, your Inheritance Tax position and whether other family members may wish to make a gift to the trust. Your legal advisor will be able to explore this with you.

What is a codicil and when can I use it?

You can change your will by means of a codicil – which is an addition to a will. This is often cheaper than making a whole new will. However, we would recommend that you only use codicil to make simple changes to your will, for example, adding in a gift to a charity.

The codicil is a separate document which is kept with your will, but they cannot be attached to each other.

How can I limit the amount of Inheritance Tax paid?

Inheritance Tax is payable if your estate exceeds the Inheritance Tax allowance. If you leave your estate to an exempt beneficiary, such as a spouse or charity, then no Inheritance Tax is payable on the value passing to that beneficiary. We recommend you speak to a professional who can give you tailored Inheritance Tax planning advice.

Is it worth leaving money to Grace Eyre if it's not that much?

Yes, definitely! Any gift you choose to leave to Grace Eyre, however big or small, is very gratefully received and will enable us to help more people with a learning disability and autistic people in Sussex. Of course, the more you leave, the more people and projects we can support.

Can I give a donation to Grace Eyre in memory of a friend or loved one?

Yes, and what a lovely idea that is too! It is a really good way to remember and pay tribute to someone close to you. By making a donation in their memory, you are making sure that their memory lives on through the vital work that Grace Eyre does for people with a learning disability and autistic people.

Can I choose what my gift is spent on?

Certainly, it is your gift to give! We welcome gifts that are for general purposes because it allows us to use the funds where they are needed most. However, we would be more than happy for your gift to go towards a specific area of our work especially if it means something to you. Whatever you choose, the gift will always be used to directly benefit the people we support and not just to keep the lights on!

Can Grace Eyre be my executor?

Unfortunately, no, Grace Eyre cannot act as an executor to your will. Most people generally appoint a friend, a family member or a professional. It is a good idea to have more than one executor though, just in case something happens to them.

Can a gift to charity help me pay less tax?

Yes, is the simple answer. Any gift to charity is exempt from Inheritance Tax. There are schemes which can reduce Inheritance Tax on your estate through charitable giving, but these are subject to change, so we recommend speaking with a professional advisor for more information.

What is the difference between a pecuniary gift and a residual gift?

A pecuniary gift is a specific amount of money. A residuary gift is a share of what's left over after all your wishes have been carried out.

How can I make sure my gift maintains its value over time?

A residuary gift will hold its value better than a cash sum because it is a proportion of your estate. Alternatively, you can leave a fixed cash sum which can be linked to the index of retail prices, allowing your gift to keep its value in line with inflation.

Do I need to tell you that I've left a gift in my will to Grace Eyre?

You don't need to tell us, but if you feel comfortable sharing your intentions, we would like the opportunity to say thank you.



Thank you for thinking about leaving a gift to Grace Eyre in your will.

If you would like to talk to us about it, please call our Fundraising Team on: 01273 201900, or email fundraising@grace-eyre.org

The Grace Eyre Foundation. Registered Charity in England & Wales no. 1020192. Company no. 02806429.

DISCLAIMER: This is a guide intended for general information for clients and other readers. It is not a substitute for considered legal advice on specific issues. Any action taken depends on your individual circumstances. Grace Eyre cannot accept any responsibility for action which may be taken because of reading this guide or for errors or omissions contained within it.

Thank you to Renaissance Legal for their continued support.