



# A lasting legacy





Leaving a gift in your will to charity is an incredibly generous way to make a donation. We understand that loved ones come first, but leaving a gift in your will to Scarborough Hospital Funds really can make a difference to ensuring the best quality of care is provided at Scarborough Hospital and in the community.

## Scarborough Hospital Funds

Scarborough Hospital Funds is part of the York Teaching Hospital Charity. The charity plays a vital role in raising funds for the York Teaching Hospital NHS Foundation Trust in the area to help to ensure the best quality of care is provided by funding aspects such as:

- Life-saving and up to date equipment
- Patient and carer support
- Additional staff and staff training and development
- Research and development
- Improving and enhancing the hospital environment

Every penny we raise is put back into our services for the benefit of our patients. With thanks to our supporters, SHF is able to make a real difference to the care that people receive when they visit the hospital.

## Key facts

York Teaching Hospital NHS Foundation Trust provides a comprehensive range of acute hospital and specialist healthcare services for approximately 530,000 people living in and around York, North Yorkshire, North East Yorkshire and Ryedale – an area covering 3,400 square miles.

In April 2011 we took over the management of community-based services in Selby, York, Scarborough, Whitby and Ryedale and in July 2012 acquired Scarborough and North East Yorkshire Healthcare NHS Trust, bringing Scarborough and Bridlington Hospitals into the organisation.

The Trust manages ten hospital sites which include The York Hospital, Scarborough General Hospital, Bridlington District Hospital, Whitby Community Hospital, Malton Community Hospital, The New Selby War Memorial Hospital, St Monica's Hospital Easingwold, Archways Intermediate Care Unit , White Cross Rehabilitation Hospital and St Helens Rehabilitation Hospital.

## How does additional funding help?

The Trust is constantly updating services but there is still scope for making further improvements. Gifts in wills are a crucial source of funding for us and by leaving a gift to the charity you can help us to keep delivering the best care possible to everyone in the Scarborough area. It does not matter how small you think the gift may be, it really will go towards making a significant difference.

Examples of how your donations have been spent in Scarborough:

- Refrigerated cot for the Special Care Baby Unit costing £2,922
- Built in entertainment systems for the Children's Ward costing £30,000
- Bedside cabinets for patients in the Maple Ward (Surgical Ward) costing £9,544
- Foetal monitors and processor for the Labour Ward costing £160,000

We will always support the wishes of our donors to ensure their gifts are spent according to their choice, whether this is to go to a specific appeal, department or ward. However, we do also encourage donations to be made to the Scarborough general fund so we can support the areas which need it the most.



# Ways to leave a gift in your will

A gift is something which is left to a person or charity through a will. There are four main types of legacies which include:

- **Residuary legacy** – this is the remainder of your estate after all other gifts have been made. This is often a popular way to leave a legacy as all other gifts have been given first and it is expressed as a fraction of your estate so it retains its value over time. This can be anything from 1% to 100%
- **Pecuniary legacy** – this is a fixed amount of money left to the charity. The amount of money may fall due to inflation so we do advise you to review the amount regularly.
- **Specific legacy** – this is a gift of a specific possession such as jewellery, antiques, land or buildings.
- **Reversionary gift** – this allows you to leave your estate to your dependants while they are living, but after they pass away it will revert to the charity. For example, you may leave your house to your first beneficiary but after their death, the house passes to the second beneficiary, which could be the charity.

If you are considering leaving a gift in your will in favour of Scarborough Hospital Funds, we recommend that you discuss the matter with your loved ones and that you obtain independent legal or financial advice.

## Adding Scarborough Hospital Funds to an existing will



If you already have a will, it is important that you keep it up to date. Fortunately, making changes to an existing will is very straightforward.

If you want to add Scarborough Hospital Funds to an existing will, your solicitor simply attaches a written instruction, called a codicil.

This must be done by your solicitor - don't make changes yourself as you may inadvertently invalidate your will. The codicil will need the signature of two independent witnesses. Please let us know if you would like a codicil form sent to you.

If there are a number of changes you want to make, it may be better to make a new will which your solicitor can help you with.



## Why make a will?

Choosing to make a will is the only way to ensure that those you love are provided for in the way that you would like after you die. If you do not have a will, loved ones may have to pay Inheritance Tax which is currently 40%

Leaving a gift in your will to a charity is tax efficient as charities are generally exempt from paying Inheritance Tax. This is often a help to people to ensure they stay within the Inheritance Tax threshold (which is set by the Government). Please ensure you speak to a solicitor regarding any questions you have about Inheritance Tax and making your will.

Keeping your will up to date will ensure peace of mind as circumstances often change. A valid will also ensures that you have control over aspects such as who looks after your children should anything happen to you. Making a will is easier than you think, and not often as expensive.

## Using a solicitor

We would always recommend that you gain quotes from solicitors if you are unsure of the costs of producing a will as the cost can depend on how complicated your affairs and wishes are. A solicitor will ensure all legal procedures are followed and answer any questions you may have. If you do not already have a solicitor you can contact The Law Society on 020 7242 1222 or visit [www.lawsociety.org.uk](http://www.lawsociety.org.uk)

We also advise contacting your solicitor to make any changes to your will or if you wish to include a gift to Scarborough Hospital Funds. Once you have made your will you need to keep it safe; keep a copy for yourself and make sure your executors know where to find it, but we advise that you leave the original will with your solicitor.

## Suggested wording

A suggested form of wording for your solicitor to include in the will is, "I give the sum of £..... free of tax to the York Teaching Hospital NHS Foundation Trust, or its successor, as the trustees of the York Teaching Hospital Charity (registered charity number 1054527), for the general purpose of that charity." If the gift is for a specific purpose, the following wording should be added, "without imposing any trust, I desire such sum to be used for.....".

## The value of your estate

It is a good idea to use the checklist below to work out the value of your estate. This can also save time when you visit your solicitor.

### Your assets (everything you own)

- House value £ \_\_\_\_\_
- Car £ \_\_\_\_\_
- Land or other property £ \_\_\_\_\_
- Jewellery £ \_\_\_\_\_
- Furniture £ \_\_\_\_\_
- Antiques / Household items £ \_\_\_\_\_
- Bank accounts £ \_\_\_\_\_
- Building Society / Post Office accounts £ \_\_\_\_\_
- Life assurance policies £ \_\_\_\_\_
- Stocks and shares £ \_\_\_\_\_
- Saving certificates / Premium bonds £ \_\_\_\_\_
- Savings £ \_\_\_\_\_
- Other items of value £ \_\_\_\_\_

**Total assets** £ \_\_\_\_\_

## Your liabilities (everything you owe)

- Outstanding mortgage £ \_\_\_\_\_
- Credit cards £ \_\_\_\_\_
- Overdraft £ \_\_\_\_\_
- Bank loans £ \_\_\_\_\_
- Other debts £ \_\_\_\_\_

**Total liabilities** £ \_\_\_\_\_

**Total assets** £ \_\_\_\_\_

**Less total liabilities** £ \_\_\_\_\_

**Total value of your estate** £ \_\_\_\_\_

Once you have calculated the value of your estate there are other aspects that you will need to consider, which include:

- Who you would like to leave a gift to in your will (family members, friends, charity) and what would you like to leave them

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

- Who you would like to be your executors \_\_\_\_\_

\_\_\_\_\_

- Who will care for your dependent relatives \_\_\_\_\_

\_\_\_\_\_

- Funeral arrangements \_\_\_\_\_

\_\_\_\_\_

- Details of your previous will (if applicable) \_\_\_\_\_

\_\_\_\_\_

- Who will look after your pets \_\_\_\_\_

\_\_\_\_\_

You may also think of other questions you would like to ask your solicitor before your meeting so make some notes to take with you.



## Contact us

If you decide to leave Scarborough Hospital Funds a gift in your will we would be extremely grateful if you could let us know. This will allow us to make future plans to ensure the best care is provided for our patients and carers. We will keep all information strictly confidential and we thank you for your support.

Name	<input type="text"/>
Address	<input type="text"/>
	<input type="text"/>
Postcode	<input type="text"/>
Telephone	<input type="text"/>
Email	<input type="text"/>
Date of birth	<input type="text"/>

- I have included Scarborough Hospital Funds in my will
- I am intending to include Scarborough Hospital Funds in my will next time I update it
- I am considering leaving a gift in my will to Scarborough Hospital Funds and would like more information about the charity

At Scarborough Hospital Funds we are always happy to offer as much help as possible. Please contact us on tel 01723 236210, email [charity.fundraising@york.nhs.uk](mailto:charity.fundraising@york.nhs.uk) or visit [www.york.nhs.uk/fundraising](http://www.york.nhs.uk/fundraising)

DATA PROTECTION: The York Teaching Hospital Charity would like to thank you for your support. The charity would like to hold your details in order to contact you about our fundraising activities. If you prefer us not to contact you in the future please tick this box

Please return your completed form to:  
Scarborough Hospital Fundraising Office,  
Woodlands Drive,  
Scarborough, YO12 6QL

Registered charity number 1054527

