Contact us

If you decide to leave the York Teaching Hospital Charity 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

Address

Postcode

Telephone

Email

Date of birth

☐ I have included the York Teaching Hospital Charity in my will

☐ I am intending to include the York Teaching Hospital Charity in my will next time I update it

☐ I am considering leaving a gift in my will to the York Teaching Hospital Charity and would like more information about the charity

At the York Teaching Hospital Charity we are always happy to offer as much help as possible. Please contact us on tel 01904 724521, email charity.fundraising@york.nhs.uk or visit 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:
Fundraising Hub, Main Entrance,
York Hospital, Wigginton Road,
York, YO31 8HE

Registered charity number 1054527
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 the York Teaching Hospital Charity really can make a difference to ensuring the best quality of care is provided to people visiting the hospitals.

York Teaching Hospital Charity

The York Teaching Hospital Charity raises vital funds to support the work of the York Teaching Hospital NHS Foundation Trust. The Trust is committed to improving the services and quality of care for patients and carers in York and the surrounding areas. The charity plays a vital role in 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

Key facts - The Trust

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.

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.
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 the York Teaching Hospital Charity, we recommend that you discuss the matter with your loved ones and that you obtain independent legal or financial advice.

Adding the York Teaching Hospital Charity 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 the York Teaching Hospital Charity 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
We also advise contacting your solicitor to make any changes to your will or if you wish to include a gift to the York Teaching Hospital Charity. 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 £___________

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 nine hospital sites which include York Hospital, Scarborough Hospital, Bridlington 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 who visits the hospitals. 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:

- £20,000 towards the Cancer Care Centre Garden at York Hospital
- £40,000 to create accommodation for parents on the Special Care Baby Unit at Scarborough Hospital
- £1,403 purchased a static bike and weights for patients at Selby Hospital
- £6,671 purchased video goggles for Orthopaedics at Bridlington Hospital for the patients to use whilst in theatre

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 overall charitable fund so we can support the areas which need it the most.