

# WILL PLANNER

Photo: Kishor Sharma / Oxfam



Ganga Devi Malla (53) addresses the members of Farmer Field School (FFS) during a group's meeting in a village in Joraya Rural Municipality, Nepal.



**OXFAM**

# STAY IN THE FIGHT FOR A FAIRER WORLD WITH A GIFT IN YOUR WILL

Your Will is one of the most important legal documents you can make. But it doesn't have to be complicated. Alongside legal advice from your solicitor or Will-writer, this short guide will help you to plan your Will.

## FREE WILL WRITING SERVICE

As an Oxfam supporter, we have a free Will service for you. This offer is available in person with a local solicitor, over the phone, online, or you could make an appointment for someone to visit your home.

Please get in touch with our Gifts in Wills advisors by phone on 0300 200 1331, email [giftsinwills@oxfam.org.uk](mailto:giftsinwills@oxfam.org.uk) or visit [oxfam.org.uk/freewills](https://oxfam.org.uk/freewills) for more information.

## ALREADY HAVE A WILL?

If you have a Will and want to leave a gift to Oxfam, you can add what is known as a *Codicil*. This means 'amend' in Latin. Speak to your solicitor about making this simple addition to your existing Will, and they will guide you through it.

## MINE TO GIVE

The best approach is to simply make a list of your main possession and assets, giving an approximate value for each item. You may have treasured possessions that you want to specifically pass on. And of course, the more practical financial support that could give your family and friends security.

You can use our guide below to help you.

ITEM	VALUE
House and any other property	
Bank account(s)	
Building society account(s)	
Investments	
Stocks and shares	
Life insurance	
Premium bonds	
Any money you are owed	
Business assets	
Cars, etc	
Furniture/household possessions	
Other assets	
<b>TOTAL A</b>	

What you owe. This could include:

ITEM	VALUE
Outstanding mortgage	
Other loans	
Overdraft	
Credit card balance	
Other money owed	
<b>TOTAL B</b>	

Simply take TOTAL B from TOTAL A. The result is the net value of what you can leave.

<b>TOTAL A</b>	
<b>TOTAL B</b>	
<b>NET TOTAL VALUE OF YOUR ESTATE</b>	

Notes:

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## FAMILY AND FRIENDS FIRST

Now you know what you've got to leave, you can use this list to write down names and details. You can give a specific item or amount of money to each person, or a percentage of everything you own. You can complete your form before or after you chat to your solicitor.

<b>Name</b>	<b>Address</b>	% share
		Amount
		Specific item(s)
<b>Name</b>	<b>Address</b>	% share
		Amount
		Specific item(s)
<b>Name</b>	<b>Address</b>	% share
		Amount
		Specific item(s)
<b>Name</b>	<b>Address</b>	% share
		Amount
		Specific item(s)
<b>Name</b>	<b>Address</b>	% share
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		Specific item(s)
<b>Name</b>	<b>Address</b>	% share
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<b>Name</b>	<b>Address</b>	% share
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		Specific item(s)
<b>Name</b>	<b>Address</b>	% share
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		Specific item(s)
<b>Name</b>	<b>Address</b>	% share
		Amount
		Specific item(s)
<b>Name</b>	<b>Address</b>	% share
		Amount
		Specific item(s)
<b>Name</b>	<b>Address</b>	% share
		Amount
		Specific item(s)
<b>Name</b> Oxfam Registered charity in England and Wales (No 202918) and Scotland (SC039042)	<b>Address</b> Oxfam House, John Smith Drive, Cowley, Oxford OX4 2JY	% share
		Amount
		Specific item(s)



## HOW-TO HINTS

### YOUR EXECUTORS – THE PEOPLE YOU CHOOSE TO MANAGE THE DISTRIBUTION OF YOUR ESTATE.

You can have up to four executors to deal with your wishes, they can also be beneficiaries of the Will. These could be friends, family, or a professional such as your solicitor. Whoever you choose, make sure you ask their permission. Make a note of your executor(s) below.

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### APPOINTING LEGAL GUARDIANS FOR DEPENDANTS

If you have children that are under the age of 18, or any other legal dependants, you should include who you wish to be their legal guardians. Discuss your wishes with the people you want to appoint as your dependant(s) guardians to ensure they agree. Again, note down their names in the space below.

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### CHOOSE A SOLICITOR

The best way to find a reliable solicitor is word of mouth. A recommendation from a friend is always useful. Or take a look online. There are lots of websites that will list solicitors in your area.

The Law Society is a good place to start. Click the 'Find a Solicitor' button, then enter your postcode into the form, and then Wills and Probate from the drop down list of 'specialisms'.

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## FREE WILL OFFER

As an Oxfam supporter we want to offer you the chance to write or amend a simple Will free of charge. It's a great opportunity to make your Will, or update your current Will – without having to worry about the cost as Oxfam covers the charge.

Please get in touch with our Gifts in Wills advisors by phone on 0300 200 1331, email [giftsinwills@oxfam.org.uk](mailto:giftsinwills@oxfam.org.uk) or visit [Oxfam.org.uk/freewills](http://Oxfam.org.uk/freewills) for more information.

# LEAVING A GIFT TO OXFAM

If you do decide to leave a gift to Oxfam in your Will, there are three main options:

- **A share in your estate**
- **A specific sum**
- **A specific item**

Once you have decided what kind of gift you want to leave to Oxfam, it would be really helpful if you could ask your solicitor to use one of the following texts.

**FOR A SHARE OF YOUR ESTATE** (residuary legacy): I give all/a share of (please state fraction/percentage) of the residue of my estate absolutely to Oxfam of Oxfam House, John Smith Drive, Cowley, Oxford OX4 2JY, Registered Charity Number 202918, to be applied by Oxfam for its general charitable purposes, and I further direct that the receipt of the Hon. Treasurer or any other proper officer of Oxfam for the time being shall be sufficient discharge to my executors.

**FOR A SPECIFIC SUM** (pecuniary legacy): I give to Oxfam of Oxfam House, John Smith Drive, Cowley, Oxford OX4 2JY, Registered Charity Number 202918, absolutely, the sum of (amount in figures, amount in words) to be applied by Oxfam for its charitable purposes, and I further direct that the receipt of the Hon. Treasurer or any other proper officer of Oxfam for the time being shall be sufficient discharge to my executors.

**FOR A SPECIFIC ITEM** I give to Oxfam of Oxfam House, John Smith Drive, Cowley, Oxford OX4 2JY, Registered Charity Number 202918, absolutely, (write in here whatever you wish to give) to be applied by Oxfam for its charitable purposes, and I further direct that the receipt of the Hon. Treasurer or any other proper officer of Oxfam for the time being shall be sufficient discharge to my executors.

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