



LEGACY

Information



**National Animal
Welfare Trust**

Charity No 1090499

www.nawt.org.uk



Thank you for considering leaving a gift in your will to the National Animal Welfare Trust. Every single gift makes a difference to animals in need.

This booklet aims to have all the information you need, but if you do have any questions please contact us:
020 8950 0177(option 1)
or via email legacies@nawt.org.uk

Leaving a legacy in your Will

Leaving a legacy in your Will could help us continue to rehome up to 1,800 animals a year and promote responsible pet ownership throughout the UK, preventing many future generations of animal abandonment and mistreatment.

A Will gives you the reassurance of knowing who will benefit from your legacy, and what arrangements will be made after your death. It allows you to provide for your loved ones as well as giving something to causes close to your heart.



At the National Animal Welfare Trust, we have established ourselves for 50 years as the animal welfare charity that never stops caring, and demand for our work continues to grow. However, we are still a relatively small charity and underfunded when compared to some of the more well-known rescue and rehoming charities. Despite this, we manage to operate five centres and an all-volunteer branch in England; rescuing and rehoming hundreds of animals a year.

We never stop caring. It's not only the animals that come to us that we aim to help, but pets and pet owners throughout the UK that are in need of help, information or advice. As part of our mission to promote responsible pet ownership, we took the decision to

Write your free Will to protect your loved ones & create a **pawsitive** future for pets in crisis



become the first UK rescue and rehoming charity to pilot Open Paw; a programme developed to provide all our animals with the enrichment, training and social skills they will need to make them more rehomeable and to enable them to successfully settle into life in their new homes.

Any gift in your Will, large or small, could make such a big difference to the lives of the animals we care for. It is true to say that legacies are absolutely crucial to our future and the animals we help, so please, consider making the improvement of animal welfare in the UK your legacy for the future.

How to leave a legacy

Your only guarantee that the proceeds of your estate will go to the people and causes that you care about is by making a Will.

LEAVING A LEGACY TO A CHARITY

Once you have remembered your friends and family, you may like to also include a legacy to your favourite charity or charities in order to support their work. Such a legacy may also help to reduce any tax burden on your estate.

National Animal Welfare Trust greatly appreciates all types of legacies of any size. All legacies are a very valuable and major source of our funding and any amount can make a difference.

Anyone can leave a legacy to the National Animal Welfare Trust and every bequest is important to us, no matter how small or large. There are a few different types of gifts you can leave in your Will; these are the most common.

PECUNIARY LEGACY

This is a set sum of money which you can leave either to individuals or charities. Pecuniary legacies can be index linked so that the value of your gift increases with inflation. Otherwise, the value of the bequest will decrease over time, as the cost of living increases.

RESIDUARY LEGACY

This is what is left of your estate once all other monies have been paid out. Unless you specify how you would like the residue to be disposed of, the Government will decide where it is to be paid out.

SPECIFIC LEGACY

This is a particular item or specific property that you can leave to an individual or charity.

ONCE YOU HAVE WRITTEN YOUR WILL

Once your Will has been written, you will need to sign it in the presence of two witnesses who will then also sign your Will in the same company. Your witnesses must not be beneficiaries or the spouse of a beneficiary. Your professional advisor will be able to assist further.

Once you have made your Will, keep a copy for yourself and keep the original in a safe place (e.g. with your Solicitor or Bank). It is advisable to review your Will from time to time and it is especially important if your circumstances change through marriage or divorce as parts of your Will may become void.

If you only need to make minor changes, this can be done by making a Codicil, which will need to be executed in the same way as your Will, and should be kept alongside your Will.



We advise anyone making or updating a Will to get in touch with a practising solicitor to help you do this.

Example wording for your solicitor

If you have decided to remember the National Animal Welfare Trust in your Will, you might like to provide the following suggested wording to your solicitor:

IF YOU'D LIKE TO LEAVE A SPECIFIC SUM OF MONEY:

I give to the National Animal Welfare Trust, Tylers Way, Watford by Pass, Watford, Hertfordshire, WD25 8WT (Registered charity number 1090499), the sum of £....., for their general purposes and the receipt of the proper officer of the charity shall be sufficient discharge for my Trustees.

IF YOU'D LIKE TO LEAVE A RESIDUE LEGACY:

I give (...%) of the residue of my estate both real and personal to the National Animal Welfare Trust, Tylers Way, Watford by Pass, Watford, Hertfordshire, WD25 8WT (Registered charity number 1090499), for their general purposes and the receipt of the proper officer of the charity shall be sufficient discharge for my Trustees.

IF YOU'D LIKE TO LEAVE A PROPERTY AS A LEGACY:

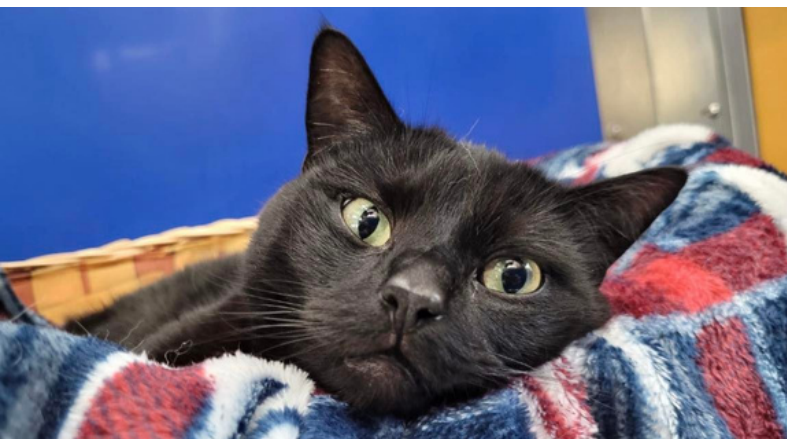
I give my property known as ... or any other property which I may own at the date of my death to the National Animal Welfare Trust, Tylers Way, Watford, Hertfordshire, WD25 8WT (Registered charity number 1090499) and I request (without imposing any binding trust or obligation) that if possible it be used to provide accommodation for animals in need of re-homing.

IF YOU'D LIKE TO LEAVE A LEGACY TO A CENTRE:

I give to the National Animal Welfare Trust, Tylers Way, Watford by Pass, Watford, Hertfordshire, WD25 8WT (Registered charity number 1090499) the sum of and I express the wish that this legacy be used for the benefit of the ... centre and the receipt of the proper officer of the charity shall be sufficient discharge for my Trustees.

IF YOU'D LIKE TO MAKE A PROVISION FOR YOUR PET:

My Executors should contact the National Animal Welfare Trust, Tylers Way, Watford by Pass, Watford, Hertfordshire, WD25 8WT (Registered charity number 1090499) to arrange for the care of any pets that I may own at the time of my death.



We advise anyone making or updating a Will to get in touch with a practising solicitor to help you do this.

We're here to help

Drafting a Will

The National Animal Welfare Trust has an easy to understand 'Aid to Drafting your Will' on the following pages.

If you would like to speak to someone in person about drafting a Will, we offer an affordable Will writing service with The Goodwill Partnership.



An Aid to Drafting a Will

This form has been written to help you think about your Will before you meet with your solicitor. By filling in as much as you can before you meet your solicitor, you should be well prepared for the meeting. By reducing the time you spend with your solicitor, and the possible need for further meetings, you could save on your bill too.

Please include full names and addresses whenever possible.

NB this form cannot be a Will in its own right. It should however help speed up the process of Will-making.

1

Your personal details

Full name:

Address:

Postcode:

2

What are your assets worth?

If you have any individual items that are particularly valuable, you might want to consider leaving a separate note identifying these and any valuations you have with your Will.

YOUR ASSETS
(or what you own)

VALUE IN £s

YOUR LIABILITIES
(or what you owe)

VALUE IN £s

Your home:

£

Your outstanding mortgage:

£

Other properties or land:

£

Any credit or HP agreements:

£

Cars or other vehicles:

£

Any loans or overdrafts:

£

Home contents:

Furniture and fittings, TV and video, artefacts, electrical, cameras, leisure equipment and books

£

Outstanding credit card balance:

£

Valuable Items:

Like jewellery and paintings

£

Other:

£

Funds in Banks & Building Societies:

£

£

Shares and Investments:

£

£

Insurance and Pensions:

£

£

Other savings and assets

£

£

TOTAL VALUE OF ASSETS: a)

£

YOUR TOAL LIABILITIES: b)

£

YOUR TOTAL ASSETS, LESS LIABILITIES:

£

3**Is this your first Will?**

If you have previously made a Will, be sure to take it with you when you meet with your solicitor. Also take any other documents that you think may be relevant.

4**Select your Executors**

You can choose up to four people, although two is more usual. It is their job to ensure that your wishes are carried out. It is important to remember that at least one of them will survive you. If you wish, you can ask your solicitor to be one of your Executors but, if they accept, they will charge for their time and deduct it from your estate. (Please remember the Chief Executive of the National Animal Welfare Trust will be pleased to act as your Executor).

Full name: Address: Postcode: Telephone:

If necessary, continue your list on a separate sheet of paper.

5**Do you have young children?**

If you do, you should consider appointing a guardian and naming them in your Will. (This is just a sensible precaution in case you die before they reach the age of 18.)

Full name: Address: Postcode: Telephone: Full name: Address: Postcode: Telephone:

If necessary, continue your list on a separate sheet of paper.

6**Pecuniary legacies**

Make a note below of any sums that you want to leave to family/friends and/or charities (these are known as pecuniary legacies). Alternatively, you could leave all of (or a proportion of) the remainder of your estate to charity after your loved ones have been looked after (see section 8).

Beneficiary: Amount: Full name: Address: Postcode: Telephone:

Beneficiary: Amount:

Full name:

Address:

Postcode: Telephone:

If necessary, continue your list on a separate sheet of paper.

7

Specific legacies

List below any specific items that you wish to leave family, friends or charities together with a brief description of each item (these are known as specific legacies).

Beneficiary: Amount:

Full name:

Address:

Postcode: Telephone:

Beneficiary: Amount:

Full name:

Address:

Postcode: Telephone:

If necessary, continue your list on a separate sheet of paper.

8

Residue of Estate

List here, the people and/or charities that you would like to share the remainder of your Estate between, after all the legacies already listed have been have distributed. This remaining part of your Estate is called the residue. Residuary Bequests have the great advantage of keeping pace with inflation and are the very best way for you to help the National Animal Welfare Trust and its work.

Beneficiary: Amount:

Full name:

Address:

Postcode: Telephone:

Beneficiary: Amount:

Full name:

Address:

Postcode: Telephone:

If necessary, continue your list on a separate sheet of paper.

9

What do you want to happen to your Estate if any of the people you have named as beneficiaries of your Will die before you?

If necessary, continue your list on a separate sheet of paper.

10

Do you and your family often travel together?

In the unlikely event that you were to die together, what do you want to happen to your Estate?

11

Do you have any other wishes?

This is where you can make your wishes known about your funeral arrangements, the type of service you would like and whether you want to leave your organs for the benefit of others.

If you have decided not to leave anything (or only a small amount) to somebody who may consider themselves a dependent, you should consider explaining your reasons here (and to your solicitor).

This is intended as a guide to making a Will only. For specific legal problems you should consult a solicitor. (If you live outside England & Wales the law may differ)



National Animal Welfare Trust

www.nawt.org.uk

National Animal Welfare Trust, Head Office & Administration
Tylers Way, Watford by Pass, Watford, Hertfordshire, WD25 8WT



020 8950 0177



legacies@nawt.org.uk

Registered Charity in England & Wales, Charity No 1090499

Legacy Glossary

Here is a list of explanations for some of the legal terms you may come across when making your Will.

Administrators

Those appointed to administer an estate where there is no Will or executor, often solicitors

Beneficiary

A person or organisation included in your Will to receive a gift

Bequeath

To leave something (money/property/jewellery) in your Will

Codicil

A separate document to change any details or provisions in your existing Will

Conditional Legacy

A gift that will only take effect if a certain event occurs

Crown

HM Treasury. This is where the proceeds of your estate will go if you do not have a next of kin and did not make a Will (intestate)

Estate

Any assets you own at the time of your death

Executor(male)/Executrix(female)

Someone you appoint to carry out the instructions in your Will. Executors are usually family, friends or professional advisors (Solicitor/Bank Manager/Accountant)

Guardians

Guardians are the people that are appointed to look after any minors up to the age of 18

Inheritance Tax

A tax charged if the value of your estate is above a certain limit

Intestate

Leaving no valid Will



Legacy Glossary

Legacy

A gift of your assets made by making a Will

Pecuniary legacy

A gift of a sum of money

Probate

The procedure to establish the validity of a Will to enable your Executors to administer your estate

Residuary legacy

A gift of all or a share of the residue of your estate

Residue

Everything that is left over in your estate after all debts, expenses, taxes and other types of legacies have been paid

Reversionary legacy

A legacy (e.g. a property or income from investments) is left to a beneficiary for their lifetime and then upon their death passes onto a subsequent beneficiary

Specific legacy

A specific item such as a piece of jewellery, an antique, shares or a property

Testate

Leaving a valid Will

Testator (male)/Testatrix (female)

The person who is making the Will

Trustee

Someone you appoint to deal with any assets left in a trust

Will

A legal statement of your wishes dealing with the disposal of your property after death

Witnesses

Two people who witness your signature and then sign your Will themselves in your presence and in each other's presence



We advise anyone making or updating a Will to get in touch with a practising solicitor to help you do this.

Legacy FAQs

We understand that you will put a lot of thought into leaving a legacy. Here are the answers to some common questions:

WHAT TYPE OF LEGACY MOST BENEFITS THE NATIONAL ANIMAL WELFARE TRUST?

A residuary legacy benefits NAWT the most because it is not lessened by the rate of inflation. A residuary legacy is the residue or remainder of your estate after other specific bequests have been made.

CAN I LEAVE NAWT A SPECIFIC SUM OF MONEY?

Yes you can. A specific sum (or pecuniary legacy) is the simplest form of legacy. You can also protect the value of your gift by directly linking it to the cost of living, so that it doesn't reduce over time.

CAN I LEAVE NAWT SPECIFIC ITEMS?

Again these gifts are very welcome. You can leave the National Animal Welfare Trust items such as property, antiques, jewellery and stocks and shares.

CAN I REMEMBER A SPECIFIC BRANCH OR ADOPTION CENTRE?

Yes. However, we advise you only express a wish for your legacy to go to a particular branch or adoption centre. By expressing a wish, the charity Trustees will have the discretion to apply the legacy to our general funds if the one you have named has since closed or changed its name, allowing us to maximize your gift and help as many animals as possible.

HOW OFTEN SHOULD I UPDATE MY WILL?

Solicitors normally advise you to review your Will every few years to make sure that it reflects your changing circumstances.



Legacy FAQs

CAN I SAVE TAX ON MY ESTATE BY LEAVING A LEGACY TO CHARITY?

Yes. Gifts made to charities are exempt from inheritance tax, which may reduce the tax your executors would have to pay.

CAN SCOTTISH LAW AFFECT MY LEGACY TO THE NATIONAL ANIMAL WELFARE TRUST?

Yes, Scottish laws relating to Wills do differ in some areas and we would strongly advise you to speak to your solicitor who will be able to advise you and ensure that your wishes are carried out.

WILL YOU LOOK AFTER MY PET SHOULD I DIE?

National Animal Welfare Trust will be happy to care for any pets that survive you. You can be safe in the knowledge that we will care for your pets until a suitable new home is found, however long that takes.

CAN THE NATIONAL ANIMAL WELFARE TRUST BE MY EXECUTOR?

The National Animal Welfare Trust would be happy to act as the executor or co-executor of your Will should you wish. If you would like to discuss this please contact our Legacy Administrator.

For further information please contact our Legacy Administrator on



020 8950 0177(option 1)



or via email legacies@nawt.org.uk

Legacy Administrator, National Animal Welfare Trust
Tylers Way, Watford by Pass, Watford, Hertfordshire, WD25 8WT

We advise anyone making or updating a Will to get in touch with a practising solicitor to help you do this.

Our Partners

Write your Will in under 30 minutes with Farewill.



We know that writing a Will can seem a little overwhelming for many people. That's why NAWT have partnered with Farewill, the largest Will writer in the UK, to offer a free Will writing service* that can be done online or on the phone. If you'd prefer face-to-face see our other partners, The Goodwill Partnership.

Get started straight away from the comfort of your home by visiting the link below to write your free will online.

www.farewill.com/nawt-web

If you don't feel confident writing a Will online, you can make your Will over the phone with one of Farewill's specialists. Book a free call back at farewill.com/nawt-phone. Alternatively, you can call Farewill on 020 8050 2686, please remember to tell the Customer Support team you are a **NAWT supporter** in order to get your Will for free*.

Farewill's specialist team are available to help you over the phone or live chat 7 days a week, 9am – 7pm.

Any gift in your Will, large or small, could make such a big difference to the lives of the animals we care for. It is true to say that legacies are absolutely crucial to our future and the animals we help, so please, consider making the improvement of animal welfare in the UK your legacy for the future.

*Limited number of free wills available.



Our Partners

Will writing service with The Goodwill Partnership



If you would like to discuss your Will with a solicitor, we have teamed up with The Goodwill Partnership*, the largest distributor of home-visit solicitor-provided Wills in England and Wales, to help make the process of making your Will extremely simple.

You'll be visited in the comfort of your own home at a time that suits you by a trained professional. Your instructions will be passed to a panel firm of solicitors, who can also provide additional legal advice together with storage of your signed Will.

There is no obligation to leave a legacy gift to NAWT through the GoodWill Partnership, but if you decide to help our work continue, we will be extremely grateful for the support.

The cost of a single Will is currently £108 + VAT and there is a small discount for a second Will for a spouse or partner.

For further information and to arrange for an advisor to visit you at home visit our dedicated page or call The Goodwill Partnership on 0844 669 6148.

*The Goodwill Partnership use only solicitors in good standing with the Law Society of England and Wales, who are regulated by the Solicitors Regulation Authority.



Pet Care Card

Guarantee your pet's wellbeing and happiness after you've gone with our Pet Care Card.

All responsible pet owners know that they need to make sure their four-legged friends will be looked after and cared for if they were to die suddenly. Have you ever wondered "What will happen to my pet after I have gone?"

The NAWT can help:

- The Pet Care Card is a free service that will guarantee you peace of mind, knowing that your pet's future will be a safe and happy one after your lifetime.
- On any one day here at the National Animal Welfare Trust we care for over 500 animals at our five rehoming centres and because we always go the extra mile for the animals in our care, you can be assured that your pet will be safe, warm and loved.
- Once your pet is brought to us they will receive a full medical and behavioural assessment in order to get the best forever home for him or her.
- We will always endeavour to find a responsible, caring owner to provide your pet with the tender and loving care you currently do.
- If, in the unlikely event we can't find your furry friend a home, we will look after them for the rest of their natural life.



Becoming a card holder couldn't be easier...

Follow these three simple steps:

Step one: Contact us to request the application form and return the completed forms so that we can send you your free Pet Care Card. The information requested about your pet will help us to match them with the best possible new home.

Step Two: Fill in the Pet Care Card when it arrives. It's a wallet-sized card so you can carry it with you, as you would an organ donor card.

Step Three: Leave instructions in your Will confirming that you would like the National Animal Welfare Trust to look after your pet(s). This is so that there is no confusion about your wishes. The suggested wording is "It is also my wish that the National Animal Welfare Trust care for and rehome any pets I may own at the time of my death".

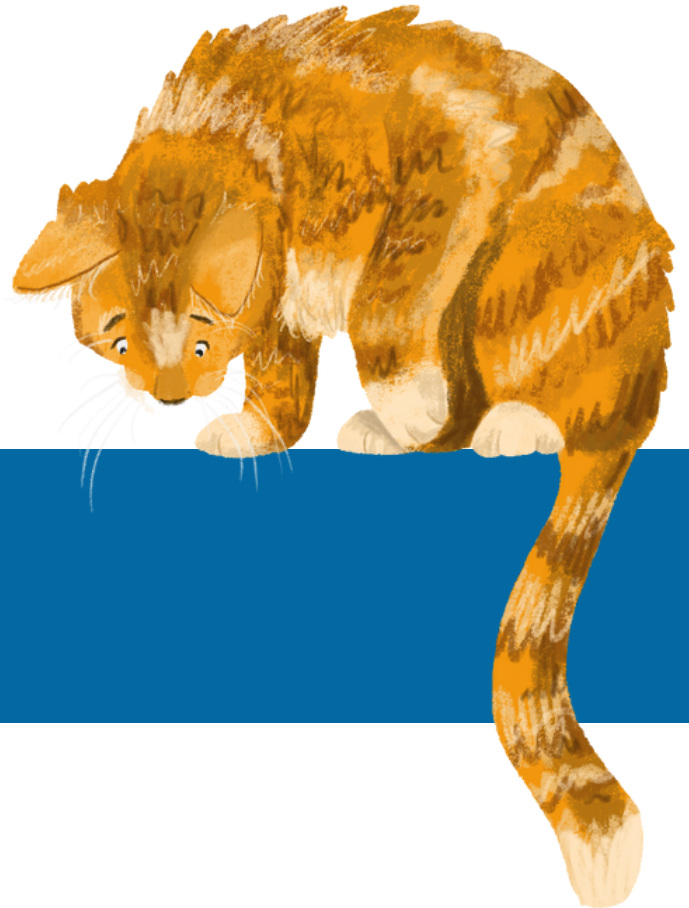
And you will never have to worry about the future of your four-legged friend again.

[You can also download an application form on our website](#)



**National Animal
Welfare Trust**

Charity No 1090499



**Thank
you**



**National Animal
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☎ 020 8950 0177

✉ legacies@nawt.org.uk

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