



The Assisi Animal Charities Foundation Guide to Making or Changing a Will



Why Make a Will?

Making a Will is very important and so is revising it regularly. Sadly, many people think it is too expensive or simply don't get round to it. By making a Will you take full control of what happens to your assets after your death. You can ensure that those you care for will receive the money or items you want them to have, and that any charities you wish to support will benefit as you choose.

If you don't make a Will, you die Intestate, and the legal system will decide how your estate will be distributed. Your belongings might even end up in the hands of the State. Even if you are married, living with someone, or have children, it is wrong to assume that they will automatically receive your estate should you die without making a Will.

Furthermore, if you want to remember a charity in your Will, like the Assisi Animal Charities Foundation, any gift made is entirely free of tax. Charitable gifts are deducted from your estate before inheritance tax is calculated.

Keeping Your Will Up-to-Date

You should regularly review and update your Will to make sure it fully reflects your wishes at your time of death. If you move house, get married, or someone already mentioned in your Will dies, you probably need to change it.



If you wish to change your Will only slightly then you can add what is known as a codicil. If you want to make more significant changes then it may be easier to write a new Will. Your Solicitor or Legal Adviser will be able to recommend the best option for your circumstances.



How to Make a Will



A Will must be in writing and signed by you and two witnesses. A Will is not valid unless it complies with certain formalities; we therefore recommend that you seek professional advice.

Follow our **step-by-step guide**:

Work out how much you have to leave, including the total sum of your property, money and possessions, less any outstanding mortgages or loans.

Decide on your funeral arrangements. To ensure your precise wishes are carried out, it is best to include them in your Will.

Decide who you want to benefit from your Will: for example, your family, friends and favourite charities or good causes.

Decide what type of gift you want to make: specific, pecuniary, or residuary.

A **specific legacy** is when you choose to leave a gift of a specific item, such as paintings, jewellery, or even your house.

A gift of a fixed sum of money is known as a **pecuniary legacy**. Remember that in time, inflation will erode the value of such a gift. So it is a good idea to either review pecuniary gifts regularly or to opt for residuary bequests.

The residue is what is left of your estate after the deduction of specific and pecuniary legacies, expenses and debts. You can choose to leave the entire residue to one person or charity, or you may choose to divide your **residuary** legacy among a number of beneficiaries.



Visit our website at: www.assisi.org.uk

How to Make a Will

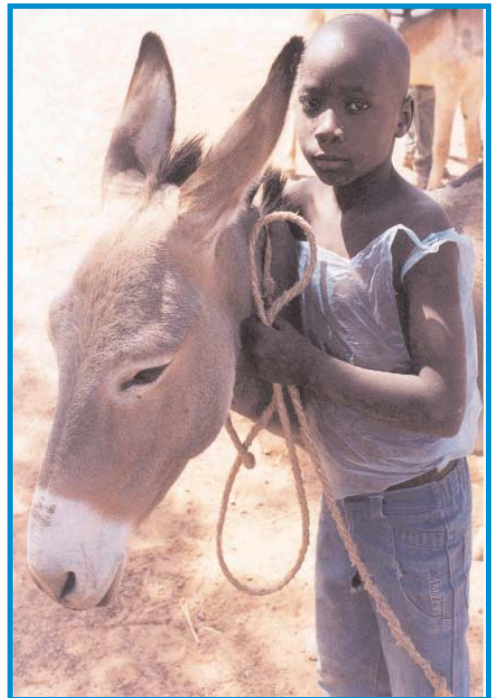
If you have remembered Assisi in your Will, please complete and return the form at the back of this booklet. This will allow us to acknowledge your act of generosity and keep you in touch with our work.

Choose Executors - people you trust to make sure the instructions in your Will are carried out. It is advisable to appoint more than one; a close friend or relative and a legal professional, who will charge a modest fee from your estate, are recommended.

Make an appointment with a professional legal adviser to draft your Will for you and take you through the process. A Solicitor specialising in Wills can also advise you on matters such as tax planning. To choose a local Solicitor look in your Yellow Pages or visit www.solicitors-online.com

Once your Will is finalised, all that needs to be done is for the Will to be signed by you and two witnesses. All three of you must sign in each other's presence.

Keep your Will in a safe place and make sure someone knows where it is. Your Solicitor will look after it free of charge.



Suggested Wording of Legacy Clause to the Assisi Animal Charities Foundation



"I give all the residue of my estate after funeral, testamentary expenses and debts, or [XX]% of my residuary estate, to Assisi Animal Charities Foundation, Registered Charity Number 1102985, Field Centre, Home Close Farm, Shilton Road, Burford, Oxfordshire, OX18 4PF, for its general charitable purposes and I declare that the receipt of the Trust Secretary or other proper officer shall be good and sufficient discharge therefore."

Or:

"I give the sum of £[amount in figures and words] pounds, free of duty, or [NAMED ITEM] free of duty to Assisi Animal Charities Foundation, Registered Charity Number 1102985, Field Centre, Home Close Farm, Shilton Road, Burford, Oxfordshire, OX18 4PF, for its general charitable purposes and I declare that the receipt of the Trust Secretary or other proper officer shall be good and sufficient discharge therefore."



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How your legacy donation

By supporting Assisi with a gift in your Will, you will help many thousands of different animals both at home and abroad in a variety of ways.

The five charities that make up the Assisi Animal Charities Foundation cover every aspect of animal health and welfare.

The **Animal Health Trust's** sole aim is to prevent, treat and cure many types of disease and injury in companion animals - horses, dogs and cats.

Donations will help the Animal Health Trust with their tireless work to fight cancer in animals - suffered by 1 in 4 dogs and 1 in 6 cats.

The Blue Cross is Britain's pet charity, providing practical support, information and advice for pet and horse owners. Through its network of animal adoption centres it rehomes thousands of animals each year. Its hospitals provide veterinary care for the pets of people who cannot afford private vets' fees.

As well as being a rescue and re-homing facility for companion animals, **The Mayhew Animal Home** provides several community outreach programmes to help animals and their owners before neglect or abuse sets in and conditions reach crisis point. Your bequest can help The Mayhew's Animal Welfare Officers reach more people and animals in need both here in the UK and abroad.



Legacy donations are essential to the work of all five member charities. Remembering Assisi in your Will does not cost you a penny during your lifetime, but your gift will mean so much to so many animals by giving them a longer, healthier and happier life.



will help Animal Welfare

The **ILPH** strives to save UK horses from abuse and neglect by rehabilitation and rehoming, whilst providing education about the health of horses in developing countries. By using charitable gifts, the ILPH can implement training courses with an aim to end abuse of horses in the Gambia by 2009.



In many poor countries, working animals play a vital part in supporting people's livelihoods. **SPANNA** operates 20 mobile clinics and 18 veterinary hospitals throughout North Africa and the Middle East, treating over 300,000 animals each year. We also educate owners about how to take better care of their animals. To maintain this vital service, we need your help.

Examples of what a gift in your Will can achieve:

£500 will buy six recovery mats. These are green waterproof canvas foam mats that are placed under the animal's bedding to eliminate the risk of bedsores and help give a pain-free recovery.

£5,000 would pay for the rehabilitation of a horse over the course of a year.

£20,000 could help buy a mobile clinic which will treat around 30,000 animals a year. Representatives will be able to travel to remote communities where there is no other veterinary care available.

For the benefit of the many animals we aim to help - please remember the Assisi Animal Charities Foundation in your Will

Visit our website at: www.assisi.org.uk

Thank you

Dear Animal Lover

Thank you for reading this booklet. I very much hope that it has provided some useful guidance on making or changing your Will. If you care for animals as much as I do and have kindly considered a gift to the Assisi Animal Charities Foundation in your Will, please accept our grateful thanks. Without the contribution to our work from legacies, we would not be able to achieve as much as we do in helping to improve the lives of so many animals.

We are indebted to you for your support in whatever way you choose to give it.

Yours sincerely



Tony Samuel
Chairman
Assisi Animal Charities Foundation



Charity Registration number 1102985



Animal Health Trust



THE BLUE CROSS
Britain's pet charity



ILPH
PROTECTING HORSES
SINCE 1927

THE MAYHEW ANIMAL HOME
& HUMANE EDUCATION CENTRE



Helping animals and their
carers since 1886™



SPANNA
Caring for Working Animals
WORLDWIDE

Glossary of Legal Terms

Here is a simple explanation of some of the more common legal terms associated with Wills.

Beneficiary

A person or organisation that benefits from your Will.

Bequest / Legacy

A gift made in your Will.

Codicil

A separate legal document detailing changes or additions to your existing Will.

Estate

The value of all your assets, less what you owe, at the time of your death.

Executor(s)

Person(s) you appoint to carry out the instructions in your Will.

Inheritance Tax

Tax deducted from the net value of an Estate. Legacies to charity reduce an estate's net value, thereby reducing inheritance tax liability.

Intestate

Dying without having made a valid Will.

Predecease

To die before another person.

Probate

The legal process confirming the validity of a Will. Once granted, the Executors are free to carry out the Testator's instructions.

Testator

A person who has made a legally valid Will.

Will

A legal document specifying how a person's wishes and assets are to be managed and disposed of after their death.



Visit our website at: www.assisi.org.uk



together
we help
animals



ASSISI Animal Charities Foundation, Field Centre,
Home Close Farm, Shilton Road, Burford, Oxfordshire,
OX18 4PF

† 01993 822651 † 01993 823083
e enquiries@assisi.org.uk
www.assisi.org.uk

Pledge Card

If you have decided to or are planning to leave a gift to the Assisi Animal Charities Foundation in your Will, it helps us to know that you are intending to do so. We would therefore be very grateful if you would complete this form and return it to us.

May we assure you that what you tell us will be treated in the strictest of confidence and is in no way binding.

Please indicate which is appropriate to you:

- I've remembered the Assisi Animal Charities Foundation in my Will
- I intend to include the Assisi Animal Charities Foundation when I make or change my Will
- I shall not be leaving the Assisi Animal Charities Foundation a legacy, but will continue to support your work.
- I require further information about the Foundation and its work before deciding.

Comments (optional)

title _____ forename(s) _____

surname _____

address _____

_____ postcode _____

tel _____

email _____

We value your support and would like to keep you informed of our international welfare and fundraising activities. If you do not wish to receive further information from Assisi, please contact us.

Please return pledge card to: Assisi Animal Charities Foundation, Field Centre, Home Close Farm, Shilton Road, Burford, Oxfordshire, OX18 4PF

Thank you.



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