Will-writing: a quick guide

The following information, provided by North Wales Wildlife Trust, is intended to help you in making your Will, but is not designed to replace the advice of a solicitor. We hope you find it useful.

1. Why should I make a Will?

A Will ensures that all your wishes will be respected and carried out correctly, when you will be unable to oversee your requests personally. It means those you care about most will benefit most. It avoids someone you do not wish to, benefiting from your estate. It saves unhappiness and legal disputes.

It is particularly important to make a Will if you have children, to appoint a guardian and ensure your wishes for their welfare are met.

2. How can I make a Will?

In today's society, there are many different ways in which you can make a Will. At North Wales Wildlife Trust, we've even entered into a number of partnerships that enable our supporters to write their Wills **for free** – without any obligations whatsoever.[1] For example, you can:

a) **Meet a solicitor**
We're part of **The National Free Wills Network**, which gives you a choice of local solicitors' practices to attend. To receive an information pack, email graeme.cotterill@northwaleswildlifetrust.org.uk or call us on 01248 351541 and ask for Graeme.

Whilst the above option may allow you to save some money, you can, of course, use your own solicitor, ask a relative or friend to suggest one or visit https://solicitors.lawsociety.org.uk to use the Law Society's 'Find a solicitor' service.

Any solicitor's role is to express your wishes in a straightforward manner, so your intentions are clear. Think in advance about your wishes and make notes to take with you – there are some suggestions below.

b) **Go online**
Using **makeawillonline.co.uk**, you can draft a Will in as little as 30 minutes and have it checked by a solicitor within a few days. The place to start is https://makeawillonline.co.uk/northwaleswildlifetrust – or, if you'd prefer to make a will online without sharing any information on any gifts to us, you can go to https://makeawillonline.co.uk/online-wills

c) **Home visit**
A trained counsellor from **The Goodwill Partnership** can take your instructions at a time convenient to you. All Wills are reviewed by a solicitor. Visit https://www.thegoodwillpartnership.co.uk/north-wales-wildlife-trust/ to make an appointment.

d) **Telephone or video call**
A trained counsellor from **The Goodwill Partnership** can take your instructions via telephone or video call. All Wills are reviewed by a solicitor. Visit https://www.thegoodwillpartnership.co.uk/north-wales-wildlife-trust/ to make an appointment.

If you have a complex estate, we would always recommend visiting a solicitor in person.

[1] In each case, we are paying a discretionary rate for a limited number of simple Wills to be written – if matters are more complex, you will need to pay any additional fees.

3. What information do I need?

The more information you have with you when you make your Will, the quicker and easier the process is likely to be.

You should start by finding any previous Will (if you have one) and any other documents you feel may be important, and making a family tree of your nearest living relatives. Then make some lists, including:

- the correct name and full address of persons or charities you wish to remember, e.g. **North Wales Wildlife Trust, Llys Garth, Garth Road, Bangor, Gwynedd, LL57 2RT, Registered Charity No. 230772**
- any particular items you have promised to friends or relations
- everything that you owe, from mortgage to HP payments (with company names and addresses)
- everything owed to you
- items owned jointly

If you're seeing a solicitor, they can help you draw up a list of your possessions with their value. They will also tell you approximate costs involved in drawing up the Will, funeral costs, etc. and explain how to take all your expenses away from your assets.

Whatever is left after specific bequests are made is the residue of your estate. Many people now choose to leave the residue to their favourite charity.

If you have personal requests (for example re. organ donation or type of funeral preferred), do ensure that close relatives know in advance. By the time your Will is read, it may be too late to carry out your wishes.

4. How can I be sure that my wishes are carried out?

This is why you appoint Executors – usually two. It can help if one is a solicitor dealing with your Will. Your chief heir – husband, wife or eldest child – may well be the other.

If you do not choose any Executors, the Court will decide for you – and they will be unfamiliar with your wishes.

5. Making sense of your Will

Legal language is a puzzle to most of us! However, these definitions may help you:

- **Beneficiary:** Anyone who benefits in any way from your Will.
- **Bequest:** Gift of items or cash.
- **Codicil:** A separate legal document altering or adding to the original Will.
- **Devize:** A gift of land.
- **Estate:** Everything you own which may include you home at the time of your death.
- **Executor:** A person you appoint to ensure that your wishes are carried out.
- **Intestate:** Someone who dies without leaving a Will.
- **Probate:** A document which establishes officially that you left a valid Will and who your executors or administrators are.
- **Residue:** Everything left over after paying taxes, funeral and other bills and all legacies have been taken out.
- **Testator (male) / Testatrix (female):** The person who is making the Will.

6. How can a gift in my Will work for wildlife in North Wales?



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North Wales
Wildlife Trust

For us at North Wales Wildlife Trust, gifts in Wills are crucial in helping us plan for the future – making sure that it's wildlife-rich and that people in North Wales understand why this is so important. Happily, it's widely acknowledged that around 35% of people in the UK would consider leaving a gift to charity. However, despite these good intentions, research suggests that only around 6% of people have actually left a bequest to good causes.

We know what a difference bridging that gap between 6% and 35% could make for wildlife locally. Legacies already do wonderful things – in recent years, they've helped us manage nature reserves, protect individual species, save wildlife sites and help schoolchildren make beautiful wildlife gardens – but there is clearly so much more that could be done.

Our various free Will-writing partnerships (see above) are designed to help people take the important step of writing a Will. Remember, there is no obligation whatsoever to use them, or to leave a gift to us if you do. If you choose to leave a legacy, of course, we're incredibly grateful for your generosity – and we hope that you will have the satisfaction of knowing that a bequest to us will leave your footprints in our landscape, forever.

We sincerely hope that any Will made in our favour will not be read for many years!

Whether you decide to leave part of your estate to North Wales Wildlife Trust or not, please do decide to make a Will!

7. Our legacy promises

North Wales Wildlife Trust are proud to have a Legacy Charter, which details our commitments to legacy-leavers and their families.

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North Wales Wildlife Trust

Legacy Charter

1. We will respect your privacy. Your Will is a personal document expressing your wishes, and we will treat any information you provide to us as confidential.

2. We understand your family and loved ones will always come first.

3. We recognise that it is your decision and that you need to make it in your own time.

4. We will never unduly influence legal practitioners to encourage gifts to the Wildlife Trust, nor pressure you to leave a gift in your Will.

5. We'd love to hear from you if you would like to let us know you have left us a gift in your Will. Equally, we respect your decision if you prefer not to.

6. We will never ask you to disclose the value or type of gift you have chosen to leave.

7. We respect your right, at any time in the future, to change your mind about a gift in your Will to North Wales Wildlife Trust.

8. The aims and objectives of the Wildlife Trust will not change in the foreseeable future. We will use your gift carefully and cost-effectively so that it has the greatest possible impact on wildlife conservation and education in North Wales.

9. We will handle whatever gift you leave us with care, sensitivity and respect.

10. After receiving your gift, we may publicise what it has helped to achieve and acknowledge your name in our remembrance book, which can be viewed at our headquarters, in order to thank you and to encourage future legacies. This will only be with the express permission of your family or the executor of your Will.