



Your guide to leaving a gift in **your will**





Thank you

Thank you for considering leaving a gift to Swansea Bay Health Charity in your will.

We're the official charity of Swansea Bay University Health Board and manage a range of different charitable funds supporting a wide variety of departments and services.

This booklet will give you a clear understanding of how the money raised benefits patients, those that support them and our staff.

We've also included practical information about how to make and change your will and the kind of things to consider when writing it.

Why leave a gift in your will to Swansea Bay Health Charity?

We work with individuals like you – patients, family, friends, the general public and staff – to raise money for good causes – those things not covered by core NHS funding – so that together, we can make a real difference to people's lives.

With your help we raise money for pioneering research, cutting-edge equipment, enhancing buildings and spaces, patient and family wellbeing and staff training which are not covered by core NHS funding.



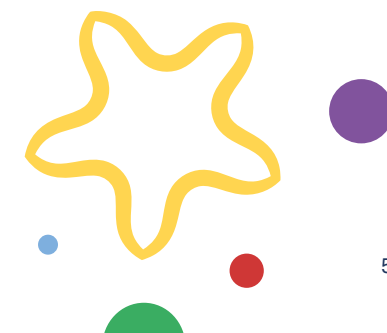
Join our amazing **community** who support your local NHS charity



A gift in your will is just one of the many ways that you can choose to support our work. We have received some generous legacy gifts from our amazing supporters.

Many of the wonderful people who donate to our charity do so in the memory of a loved one, often as a thank you or an acknowledgement of the care or support they have received.

Gifts in wills to Swansea Bay Health Charity do so much to help us support NHS staff, provide research and specialist equipment, and address local health inequalities. Therefore, every single gift is incredibly precious.



What your 'thank you' can do

Pioneering research

Our investment of **£107,000** in 2023-24 supported projects including a world-leading trial with Swansea University to pioneer the use of scans and blood tests to detect pancreatic cancer earlier and improve survival rates. It also boosted innovation in renal services by paying for researchers to access a leading international resource of top-quality data.

Cutting-edge equipment

Our investment of **£294,000** in 2023-24 bought premium medical equipment over and above what NHS core funding provides. This included a portable renal scanner to improve the experience of kidney dialysis patients and a new ultrasound machine for Gynaecology Surgical Services which gives improved images, improving diagnosis.

Enhancing spaces, patient welfare and amenities

Our investment of almost **£231,000** in 2023-24 provided a wide range of practical, emotional and wellbeing support to patients and their loved ones including beautiful flower beds around Singleton Hospital, a support group for those affected by secondary breast cancer and craft materials and empathy dolls for older patients with dementia.

Staff wellbeing and training

Our investment of more than **£100,000** over the past two years in staff wellbeing and **£90,000** in training provided a wide range of support including breakfast tokens, the Sharing HOPE therapeutic arts project and support to attend training courses and conferences over and above that covered by core NHS funds. Investing in staff wellbeing and training helps to improve patient outcomes and experience.



Why **your will** matters to you

Your will may be one of the most important documents you ever write. That's because if you have last wishes, including them in your will is a great way to be certain they're carried out. A will is also an excellent place to record your funeral wishes.

Your will can make sure that the right people get whatever you've decided to leave for them. It's a simple way to carry on looking after loved ones when you're no longer here.

If you die without a will, the choices you've made may not actually be respected, and your loved ones could be left with a lot of difficult decisions to make, which could lead to considerable distress.

Finally, your will can also carry on your support for causes that are close to your heart. By including a gift to our charity in your will you can write a forever thank you with a gift that will carry on making a difference, long after you're gone.



Three types of gifts to leave in your will

These are the three most common types of gift to leave in your will...

1

I'd like to leave what's left of my estate

After you've taken care of your family and friends and paid off any debts or taxes, you can gift either a portion or all of what's left – it's up to you.

For example, just 1% of what remains of your estate could make a real difference. Many supporters like this kind of gift because, as a part of your overall estate, it keeps its value over time.

2

I'd like to leave a specific amount

Another option is to leave a fixed amount of money, which you set aside in your will. This type of gift is paid out before the residue of your estate is calculated. But over time, inflation can reduce its value and make it less impactful.

3

I'd like to leave a specific gift

A specific gift is a particular valuable item – like property, shares or a piece of jewellery. With any of these types of gifts, you are free to restrict your forever thank you to a certain type of work we do. But, in fact, if you leave them unrestricted, it means we can use your gift to help where the need is greatest at the time.

If you would like to chat about restricting your gift, please email us at:
swanseabay.healthcharity@wales.nhs.uk

Gifts in wills and tax

The good news is that any gifts left to charities are exempt from Inheritance Tax. On top of that, sometimes by including a gift to a charity you can reduce the tax on everything else you leave behind. But Inheritance Tax is a complex and often-changing area of law, so we advise you visit **www.gov.uk/inheritance-tax** for all the latest information and speak to a professional.

Your will writing checklist

Step 1

Make a list of your most valuable possessions. Remember to include any property you own, any savings or investments, as well as any valuable items like jewellery or paintings.

Step 3

Family and friends come first. Start by working out who you'd like to look after and what you'd like to leave them.

Step 4

Then remember causes close to your heart. Make a list of the charities you'd like to support and think about how you'd like to make those gifts.

Step 2

Add up what you think they're worth. A rough estimate is all you'll need to help work out what gifts you'd like to make.

Step 5

Choose executors and write your will. Many people choose trusted family members as their executors. And there are many ways available to write your will, from consulting a professional to completing a simple template or using one of a variety of online services that can guide you through the process and verify your document.

It's sensible to keep your will in a safe place – and to tell your executors where it is. Many professional will writers and solicitors offer to store your will. Don't worry if your life or decisions change. It is simple to write a new will that can change your instructions, or to update your will using what's called a 'codicil'.

Use this handy **template** to write your forever thank you

Step 1&2:

List your valuable possessions and estimate their value

- 1.
- 2.
- 3.
- 4.
- 5.

List 3

List what you'd like to leave and to whom

- 1.
- 2.
- 3.
- 4.
- 5.

List 4

List the charities you'd like to support and your gifts

- 1.
- 2.
- 3.
- 4.
- 5.

List 5

List your executors

- 1.
- 2.

Now you're ready to write your will.

The **wording** you need to use in your will

When you want to leave **what is left of your estate**

Subject to the payment of my debts, funeral and testamentary expenses, I give the whole/ _____ % of my estate not otherwise disposed of by this my will to Swansea Bay Health Charity, 1 Talbot Gateway, Port Talbot, SA12 7BR, Registered Charity No 1122805 (England & Wales) for their general purposes and I declare that the receipt of its Treasurer or other proper officer shall be a full and sufficient discharge.

When you want to leave **a specific amount**

I give free of tax to Swansea Bay Health Charity, 1 Talbot Gateway, Port Talbot, SA12 7BR, Registered Charity No. 1122805 (England & Wales), the sum of £_____ for their general purposes and I declare that the receipt of its Treasurer or other proper officer shall be a full and sufficient discharge.



**Elusen Iechyd
Bae Abertawe**

**Swansea Bay
Health Charity**



Don't forget

You can also ask for donations to be made to Swansea Bay Health Charity in lieu of funeral flowers.

Get in touch

Email: swanseabay.healthcharity@wales.nhs.uk



**Elusen Iechyd
Bae Abertawe**

**Swansea Bay
Health Charity**

Swansea Bay Health Charity, 1 Talbot Gateway, Port Talbot SA12 7BR
Charity Number: 1122805



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Bwrdd Iechyd Prifysgol
Bae Abertawe
Swansea Bay University
Health Board