



The Shakespeare Hospice Make A Will Online Guide



Making a Will has never been easier

We've partnered with **Make a Will Online** so you can create a free and simple online Will. Making a Will is beneficial at any stage of life, whether you've got married, bought a house or even become a grandparent. By making a Will you can relax in the knowledge your loved ones are provided for.

The service is free and available throughout the year and you don't have to include a gift in your Will to the Hospice to use the service.

In this guide you'll find lots of useful information about making a Will and how to use the free online service. Make a Will Online acts solely in your interests and only takes instructions from you. The guide does not constitute legal advice by The Shakespeare Hospice and we strongly advise that you should seek your own professional advice.

Did you know?

- If you die without a will, there are certain rules which dictate how your money, property or possessions should be allocated. This may not be the way that you would have wished.
- Unmarried partners and partners who have not registered a civil partnership cannot inherit from each other unless there is a will. (if there's space to include this as well).



About Make A Will Online

The website was started to offer an affordable, convenient and stress-free Will writing service, perfect for busy people or anyone who would rather see their money go to loved ones or a charity than paying expensive fees. The documents were designed in partnership with an experienced solicitor and conform to established legal precedents.

Making a Will online is a simple secure process and once you have started, you can sign in and continue at your convenience. You will find full guidance throughout the Will writing process, explaining all of the important legal terms relating to Wills and probate.

Making a Will Online is a simple 3 step process - answer a straight forward set of questions, review and when you're happy, confirm.

When you have finished making your Will online, you can log in and make changes to the document for up to 30 days. Once your Will has been correctly signed and witnessed, you will be legally covered and can relax in the knowledge that your estate is safe.

This online service is suitable for the large majority of circumstances but if you have any complex wishes, a high value estate worth more than the Inheritance Tax threshold, are planning or setting up discretionary Trusts, we recommend that you talk to a solicitor.

Make a Will Online Guarantees:

- Every Will made is checked by a qualified UK solicitor
- £2,000,000 professional liability insurance for your protection
- Members of the Society of Will Writers and follow their code of conduct
- Members of the Fundraising Regulator

FAQ

Are online Wills Legal?

The short answer is yes; online Wills are legal, if you fill in the information correctly and sign/witness the document correctly. With your Will, you will receive a comprehensive document explaining the witnessing process and how to store your will once it has been completed, signed and witnessed.

Does this online Will replace any other Will in place?

If you make a new Will online, signed in the presence of witnesses, your old one is no longer valid. The new Will should state that it revokes all previous Wills and codicils and the old Will should be destroyed.

Does this online Will replace any other Will in place?

You do not need a solicitor present to write a Will. That said, there are some important reasons why you should want your Will to be checked by a solicitor, and why every Will made on Make a Will Online is checked by a solicitor. All qualified solicitors are regulated by the SRA - the Solicitors Regulation Authority – and have to follow their code of conduct. Solicitors also have to study and pass tough exams before they can call themselves solicitors. They need appropriate insurance to ensure you are protected. Make a Will Online are authorised by the SRA to provide the services of solicitors to the public.

What is probate?

Probate is the process of dealing with a deceased person's estate, including their finances and assets, and then distributing the estate among beneficiaries. With a legal and up-to-date Will in place, the executors named in the Will have responsibility for probate, so it is important to inform your chosen executors. Our Will writing service allows you to name back-up executors in case your first choices are unwilling or unable to perform the duty. Executors will be issued with a "grant of administration" which allows them access to the deceased's assets, in order to distribute them once any inheritance tax has been paid. If you die without a Will, a close relative can apply to the Probate Registry to be officially recognised as responsible for your estate. This process is not always a smooth one and a "grant of letters of administration" is not always issued. By far the best way to avoid this difficulty is to have a legal and up-to-date Will in place.

What is an executor?

An executor is responsible for making sure the instructions in your Will are carried out. You can choose up to four people but do confirm that they are happy to accept this role.

Who can witness a Will?

Witnessing the last Will and Testament is an essential step in making your Will legal. If your Will is not correctly witnessed, it is not valid. If you choose invalid witnesses (see below), they will not be able to inherit from your estate. Your Will must be signed by two witnesses, in your presence, at the same time as you sign the Will.

- A witness or married/civil partner of a witness cannot benefit from a Will.
- A blind person cannot be a witness.
- Witnesses must be over 18 years of age.
- A witness must be “of sound mind” and capable of understanding the nature and effect of what they are doing in witnessing your Will.
- If a witness is a beneficiary (or the married/civil partner of a beneficiary), the Will is still valid but the witness will not be able to inherit from the Will.

With Make a Will Online, you will receive comprehensive instructions for signing and witnessing your Will along with the document.

Should I remember a charity in my Will?

Gifts left in Wills are one of the major sources of income for UK-based charities. A gift in your Will is not subject to inheritance tax and could reduce any tax to pay from your estate while supporting a good cause.

Our service allows you to assign a legacy of any size and you can either give a specific gift to a charity, normally a sum of money, or you can make the charity a residuary beneficiary.

What are the different types of gifts I can leave to charity?

There are three types of gift (legacy or bequest) you can leave to charity in a Will:

Pecuniary Gift is a fixed sum of money.

Specific Gift is usually made up of one or more dedicated assets that are handed over in a will. Specific gifts commonly include treasured family heirlooms like jewellery, artwork and furniture.

Residuary Gift is everything that is left in your estate after all debts, bills and taxes have been paid and all other gifts have been distributed. Leaving the residue of an estate to a named beneficiary is called a ‘residuary gift’. Residuary gifts are a common way to ensure that all remaining property passes to your chosen beneficiaries, rather than falling under the intestacy rules.



Getting Started

Writing a Will doesn't have to be difficult and we want to help you make it as straightforward as possible. We've provided a simple checklist for you to plan and prepare before you make your Will online.

Prepare and fill out your personal checklist on the following page

What is the total value of your estate?

This includes everything from the money in your bank account to any property that you own.

Is your estate subject to Inheritance Tax?

IHT rates in the UK can be as high as 40%, you'll need to account for this when managing your estate.

Who are your beneficiaries?

Your will should clearly state who gets what from your estate in the most specific terms possible.

Who is your executor or executors?

You must decide who will be in charge of going through the process of probate and ensuring that your estate is distributed correctly, according to your wishes.

Are any assets being written in trust?

If you have children, you may wish to write their inheritance into a trust for them to receive it at a particular age.

Do you need to appoint a guardian?

Any dependents, such as children, will need caring for in the event of your death.

Your Personal Checklist

Personal details including names, addresses (if different from yours) and date of birth of immediate family and beneficiaries

Your partner:

Your children:

Your executors (up to four):

Executors ensure that your wishes are carried out when you die

Your appointed guardian(s):

Making provision for your children is essential. If you have children under 18 then you should consider appointing guardians to look after your minor children in the event of your death. Your children are not entitled to claim your estate until they are 18. With children under 18 we advise that special clauses be included to ensure that there is flexibility relating to the investments and that some of the estate can be paid in advance to them if they need it for things such as education, birthdays and holidays.

Your Assets & Liabilities

Make a note of everything you own and their approximate value and your debts to get an idea of what your estate will be worth

Assets

Your home (or share in it)
Other property and land
Cars and other vehicles
Home contents
Valuables (jewellery, art, family heirlooms)
Money in banks and building societies
Shares, investments, savings and bonds
Insurance and pensions
Other savings and assets

Total Assets

£

Liabilities

Your mortgage
Loans and overdrafts
Credit card debts
Credit or HP agreements
Other liabilities

Total Liabilities

Total assets - Total Liabilities = Total Estate Value

£

Decide How To Divide Your Estate

You should make sure that it's absolutely clear what you want to happen to your whole estate. This includes:

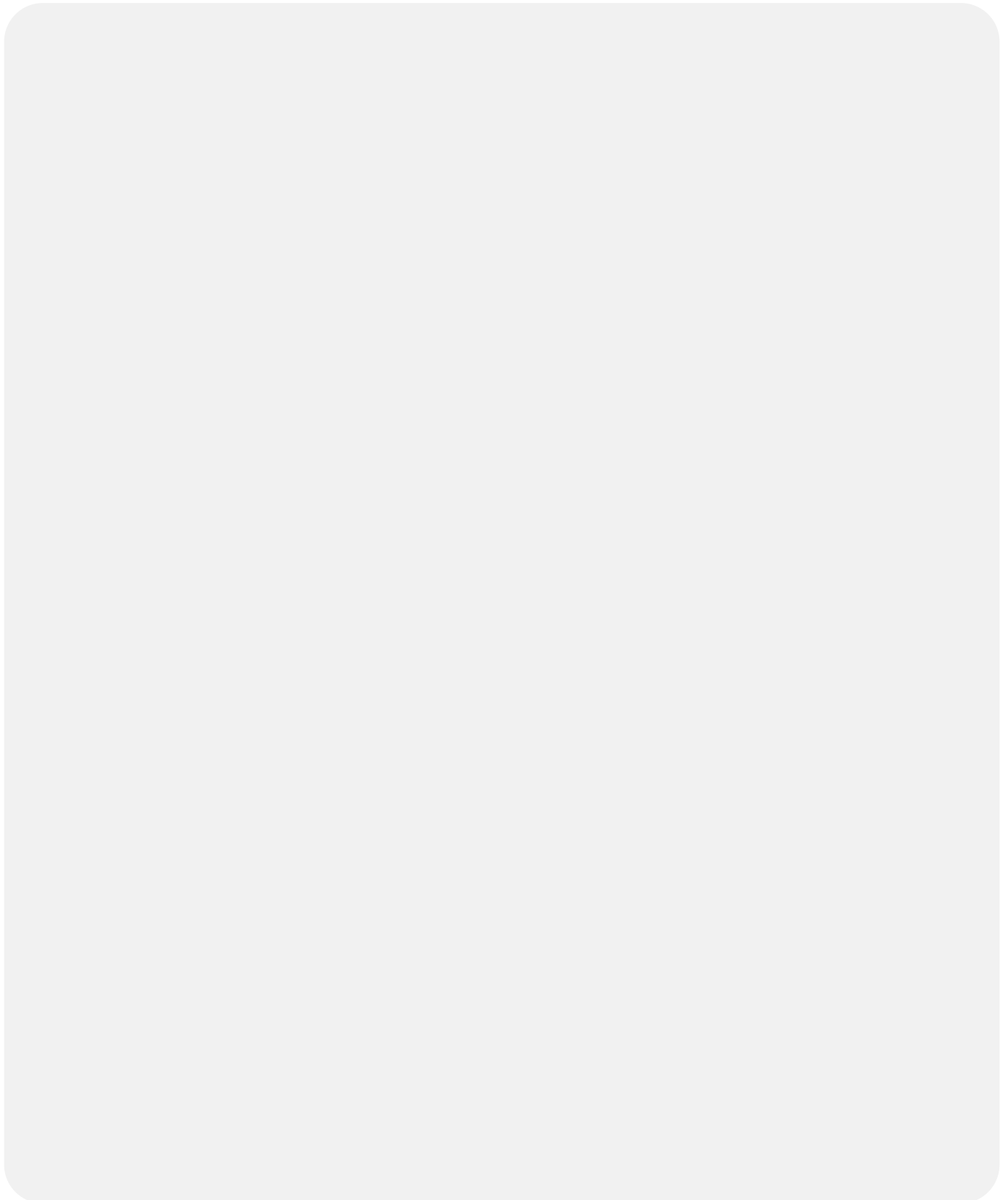
- Who you want to benefit from your Will
- Whether you wish to give any specific gifts to particular people
- Where the residue of the estate is to go (any property or money left over after paying funeral and administrative expenses, legacies and taxes)
- What you want to happen if any of your beneficiaries should die before you

Name	Share (%)	Amount (£)	Specific Item
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You may decide to leave a residuary gift (what remains of your estate when your beneficiaries have been accounted for) to a charity like The Shakespeare Hospice. If you plan to leave a gift to a charity in your Will, make sure you include the charity's full name, address and registered charity number. Incorrect information may mean your chosen charity doesn't receive the gift.

Notes & Questions

Make a note below of any questions or if you need more information not already covered in this guide.





Thank You

We hope this guide has been useful and helped you prepare the information you may need to make your Will online. By making a Will now, you are giving your loved ones peace of mind for the future and we would like to thank you for choosing our Free Make a Will Online service.

To begin the online process and make your Will, please go to our website - **[TheShakespeareHospice.org.uk/Free-Will-Service](https://www.theshakespearehospice.org.uk/Free-Will-Service)**

If you need help to complete the forms, you should contact Make a Will Online. The Shakespeare Hospice cannot offer help.

Get in touch

If you have any further questions about leaving a gift to The Shakespeare Hospice in your Will or our Make a Will Online service, please email our team on **fundraising@theshakespearehospice.org.uk** or call **01789 266852**



Please get in touch if you have any questions about making a Will online or would like to know more about our services.

The Shakespeare Hospice offers outstanding palliative and end-of-life care to patients, their families and carers across South Warwickshire.

Our reach extends beyond the traditional Hospice walls, providing expert support within our local community and patients own homes.

Our vision is every young person and adult living in our community with a life limiting illness, and those who matter to them, will be supported with the care and compassion they need.

Contact

 01789 266852

 fundraising@theshakespearehospice.org.uk

[TheShakespeareHospice.org.uk/Free-Will-Service](https://www.theshakespearehospice.org.uk/Free-Will-Service)