



STEPS TO MAKING YOUR WILL

1. CHOOSE THE EXECUTOR

You need to choose people to be responsible for administering your Will. This could be a friend, relative, partner or solicitor.

2. CARING FOR CHILDREN

If you have children under 18 (under 16 in Scotland) or pets, it is important to choose guardians to look after them in the event of your death.

3. VALUING YOUR ESTATE

This is what you own, less what you owe, list your assets and calculate their approximate value and deduct any loans, mortgages etc.

4. LEAVING GIFTS TO FAMILY, FRIENDS AND GOOD CAUSES

Make a note of who you would like to receive your property. There is no limit to the number of gifts you can make. Once you have provided for your family and friends, you may consider leaving a gift to a charity or cause that is important to you. If you do decide to remember us in your Will, it would mean a great deal to us. Every gift that we receive plays a significant role in helping us to continue transporting seriously ill children to where they can receive the best possible care and ultimately improves their survival chances.

SAMPLE WORDING:

FOR A RESIDUARY GIFT: "I give free of inheritance tax XXX% of my residuary estate to Lucy Air Ambulance for Children of CAN Mezzanine, 7-14 Great Dover Street, London SE1 4YR, registered charity number 1138457, for general charity purposes and I declare that the receipt of the treasurer or other proper officer for the time being shall be a sufficient discharge to my executors."

FOR A PECUNIARY GIFT: "I give free of inheritance tax £XXX to Lucy Air Ambulance for Children of CAN Mezzanine, 7-14 Great Dover Street, London SE1 4YR, registered charity number 1138457, for general charity purposes and I declare that the receipt of the treasurer or other proper officer for the time being shall be a sufficient discharge to my executors."

5. INSTRUCTING A SOLICITOR

They will discuss your instructions and advise on how best to word the Will to reflect these. You can use your solicitor as the executor if you wish. If your estate is large you may consider making arrangements for tax planning and they can help with this.

6. APPROVING YOUR WILL

Once drafted, the Will should be sent to you for approval. Changes can be made at this point. Once you are happy, the solicitor will ask you to sign it in the presence of two witnesses (witnesses cannot be beneficiaries).

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