

# A guide to leaving a gift in your will



**Thank you for considering leaving a gift in your Will to the  
Dame Hannah Rogers Charity.**

Any gift, large or small, that you are able to give will help to enrich, empower and advocate the lives of people with a range of disabilities for many years to come.



# What's inside your guide



## Contents

What's inside your guide.....	3
You can help us to keep the Dame Hannahs Promise.....	4
“Why I left a gift in my Will” One supporter’s story .....	5
How your gift could help transform lives .....	6
Why your help will be vital in years to come .....	7
How your gift could help transform lives .....	8
How to remember the Dame Hannah Rogers Charity in your Will .....	9
Vital information you’ll need.....	10
Your questions answered.....	11
Your codicil form.....	13
Your reply form .....	15

# You can help us to keep the Dame Hannahs Promise



**At the Dame Hannah Rogers Charity we promise to make a commitment to 5 core themes, which are at the heart of our work with people with a range of disabilities. By remembering us with a gift in your Will, you are helping us to keep our promise and continue this vital work.**

## **Community**

A community for people of all abilities. Where we share our lives, learn to understand, contribute, make friends, have fun and have somewhere we truly belong.

## **Learning**

A place for people with disabilities to learn and develop in a real, non judgemental and exciting environment.

## **EXperiences, Opportunities & Fun**

A place where disability is incidental. Where we

can try new things, develop, share dreams and live life to the full.

## **Wellbeing**

A place where excellence and holistic support leave us feeling happy, confident, fulfilled, relaxed and ready to take on the world.

## **Innovation & EXcellence**

We are a centre of excellence, encouraging inspirational thinking, new ideas and always challenging the status quo.

# “Why I left a gift in my Will” One supporter’s story



**“I have always been inspired by the fantastic work of the Dame Hannah Rogers Charity and I hope my gift will help them to continue with this work long into the future”**

John Small, 81, has personal experience of caring for a close family member with complex and profound disabilities. His family has relied on the services at Dame Hannahs for respite breaks and various support services.

“The work of the Dame Hannah Rogers Charity has been a lifeline to my family”

John’s Will includes his family and friends and it also includes another important gift – a gift to the Dame Hannah Rogers Charity.

“It’s natural to want to remember family and friends,” John says, “but the work of the Dame Hannah Rogers Charity also needs to continue for years to come. Leaving a gift in your Will is a great way to protect that work and ensure the future generation benefit from all the support offered by the Trust.”

# How your gift could help transform lives



**A gift in your Will can help to support people with a range of disabilities who access or reside with us in Ivybridge.**

**We see miracles every day at Dame Hannahs!**

**Here is just one of these life changing stories:**

Hannah first joined Dame Hannahs in 2006 when she started in our school aged 10. She had a happy few years in school and then aged 19 she moved to Adult Services in Hannahwood. Since then she has been living in Marchesi bungalow with a close group of friends most of whom she has known for several years as they were at school together. Hannah's parents live nearby so they are able to visit regularly and take her home for visits too.

Since moving to Dame Hannahs from mainstream school, Hannah's mobility and behaviour improved significantly. She moved from using a manual to a power wheelchair quite quickly and her behaviour became much calmer. Her communication skills have also improved and she now loves using photo books to chat to friends and family, as well as her talker. She loves taking funny photos of herself too. People who know her well can also tell what she wants through her body language.

Hannah likes listening to music, reading books and watching videos and slapstick comedy on television. She loves going to the theatre, shopping for clothes and jewellery, travelling on holiday, riding on her three-wheel bike, going sailing and on adventures with Minnie the dog. Hannah is also a keen baker and uses the kitchen in her bungalow regularly to bake cakes as well as help prepare other favourite dishes such as Spanish omelette, Spaghetti Carbonara and pizza. Hannah is a happy member of her group and laughs a lot!

Kim Antonio: "Hannah is happy and content and is valued as a person which is really important. She lives in an environment where she can make choices which she loves. She likes people and definitely has her favourites! We have always encouraged her to try everything. I think Hannah really likes life".

# Why your help will be vital in years to come



**The Dame Hannah Rogers Charity only exists because over 250 years ago Dame Hannah Rogers left a £10,000 gift in her Will “for poor and unfortunate children from Devon and Cornwall”.**

Dame Hannah Rogers had a passion for working with children and those less fortunate than herself and her legacy lives on today, providing care and other multidisciplinary services for young people with profound physical disabilities from right across the UK.

The Dame Hannah Rogers Charity is a testimony to the difference a gift in your Will can make – however big or small.

Over the years Dame Hannahs has continued to evolve and change its focus based upon the need of those requiring expert care and attention where that service was missing.

In 1925 Dame Hannahs was the UK’s first orthopedic hospital, then in the 50’s we opened the doors to support children with cerebral palsy providing education and medical support which continued until 2020.

Now in 2021 our site in Ivybridge continues with an adult only focus which meets the current need.

Our Ivybridge site has multiple CQC registrations all of which are rated as Good<sup>\*\*\*</sup> across the board with Outstanding in Caring<sup>\*</sup> and Responsive<sup>\*</sup> on particular registrations.

The sites include residential living, an innovative transition project for 19-25 year olds called Hannahwood, day placement services and a respite centre all set in the stunning countryside of the South Hams in Devon. All of this is manned by our dedicated care staff, nurses, and therapies teams.

\*Hannahwood Mews - Responsive  
\*\*Hannahwood Transits - Caring  
\*\*\* As at April 2021

# How your gift could help transform lives



**There is more than one way to remember the Dame Hannah Rogers Charity in your Will. Naturally, you will want to look after your loved ones first, but when you give a gift in your Will you can also help people with disabilities to receive the care, support and services they need.**

**A residuary gift** is the remainder of the estate once other gifts and payments have been made. This type of gift is popular because it takes care of others first and remains proportional to the value of your estate by keeping pace with inflation.

**A pecuniary gift** is a fixed sum of money. The value of a pecuniary gift could decrease over time, as the cost of living increases.

**A specific gift** is a particular named item, for example a piece of jewellery or property.

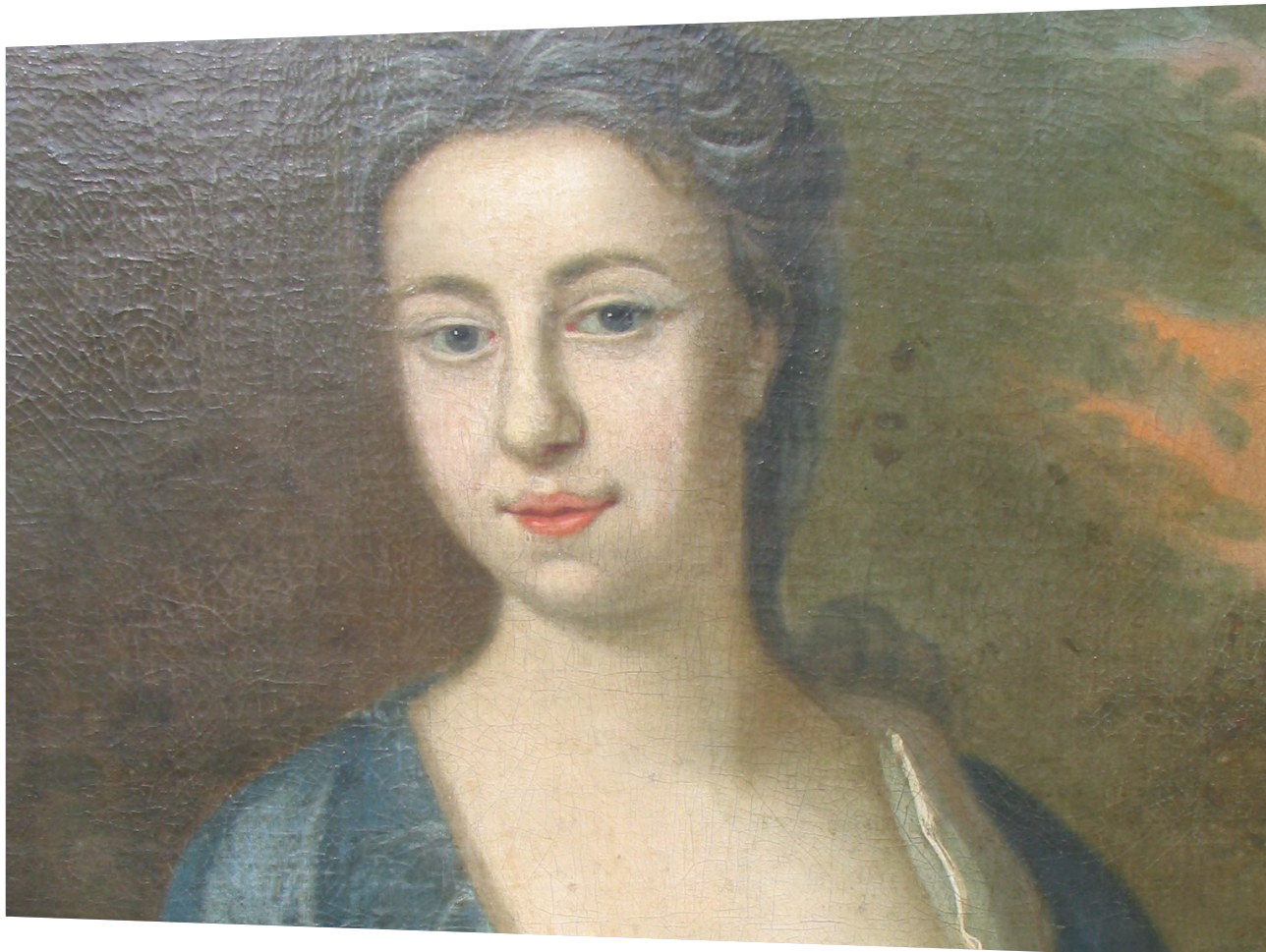
**A revisionary gift** allows you to leave assets for the care of a loved one for the duration of their life. When they die, your gift will then go to your chosen recipient.

And it's  
tax-free!

– Remember,  
most gifts in Wills are  
completely tax-free.



# How to remember the Dame Hannah Rogers Charity in your Will



1. Calculate the value of your estate, taking into account property, investments and any debts.
2. Decide on your beneficiaries – the members of your family, close friends or charities you want to remember in your Will. Many people chose to leave a percentage of the estate to the Dame Hannah Rogers Charity, as this ensures their loved ones are provided for first.
3. Appoint your executors. These individuals will be named in your Will, and as such, they will be responsible for making sure your instructions are carried out.
4. Visit a solicitor to have your Will drawn up. Details for how to find a solicitor are on page 9 in the section called 'Your questions answered'.
5. Store your Will in a safe place and keep a copy to check from time to time. Your solicitor will often store it without charge.
6. Make sure a relative or close friend know where the original copy of your Will is stored.
7. Finally, please take a moment to complete 'Your reply form' (included in the back of this guide), giving us notice of your intentions.

## Don't Forget

If you already have a Will, and wish to add the Dame Hannah Rogers Charity as one of your beneficiaries, ask a solicitor to help you complete 'Your codicil form' and then keep it safe with your Will.

# Vital information you'll need



When adding the Dame Hannah Rogers Charity as a beneficiary to your Will, we suggest you use the following wording to ensure your gift is valid.

Any gift to the Dame Hannah Rogers Charity will make a difference. A residuary gift is popular with many supporters because it takes care of others first and remains proportional to the value of your estate by keeping pace with inflation.

## Residuary gift

To leave a residuary gift we suggest the wording:

*'I give \_\_\_\_\_ percent of my residuary estate to the Dame Hannah Rogers Charity (Registration No. 1194836), Woodland Road, Ivybridge, Devon PL21 9HQ to be applied for its general purposes and I declare that the receipt of the finance director or appropriate officer shall be a complete discharge to my trustees.'*

## Pecuniary gift (cash sum)

To leave a pecuniary gift (cash sum), we suggest the wording:

*'I give £\_\_\_\_\_ to the Dame Hannah Rogers Charity (Registration No. 1194836), Woodland Road, Ivybridge, Devon PL21 9HQ to be applied for its general purposes and I declare that the receipt of the finance director or appropriate officer shall be a complete discharge to my trustees.'*

If you need any information on making a Will or amending your current Will to include the Dame Hannah Rogers Charity, please call us on 01752 898135 or email [supportus@discoverhannahs.org](mailto:supportus@discoverhannahs.org)

# Your questions answered

## What type of gift is best?

Any gift to the Dame Hannah Rogers Charity will make a difference. A residuary gift is popular with many supporters because it takes care of others first and remains proportional to the value of your estate by keeping pace with inflation.

## Can I leave a gift to be used for a specific area of work or project?

Gifts in Wills are counted as voluntary income and if you don't limit your gift to a specific area of work it can be incredibly helpful to us – we can use your gift wherever the need is greatest at that time.

However, if one particular area of our work is very close to your heart, then please do contact us on 01752 898135 or email [supportus@discoverhannahs.org](mailto:supportus@discoverhannahs.org) to discuss your specific gift in more details.

No matter what you choose to do, we've provided some suggested wording for your Will on page 10.

## Who is best placed to act as an executor of my Will?

Although there is no need to do so, we suggest that you consider nominating a professional executor, such as a solicitor or bank, alongside a family member or friend. You should not appoint a professional executor without establishing in advance what charges, if any, he or she intends to impose for acting. It is not always necessary for the professional executor to take an active role in the administration. However, they can be on hand to provide advice and assistance to their co-executor when needed.

We also recommend that you discuss your wishes with those people you would like to appoint in your Will to ensure that they are willing and able to take on the role of executor. The Dame Hannah Rogers Charity does not generally act as an executor.

## How do I choose a solicitor?

Details of solicitors in your area specialising in Wills, probate and tax law work can be found by searching the Law Society website [www.lawsociety.org.uk](http://www.lawsociety.org.uk) or calling their general enquiries line on 0207 242 1222.

When deciding on a solicitor, we suggest that you ask how much they would charge for preparing your Will or codicil and for dealing with your estate if appointed as executor.

From time to time Dame Hannahs also run 'Make Your Will Week' which is supported by a variety of solicitors based throughout Devon and Cornwall. During this fantastic week each of the partnering solicitors donate their time to write and consult with our supporters on drawing up a Will.

All they ask is that a donation is made to Dame Hannahs which reflects the time and service which they provided. No charges for their Will writing service will be made unless there are additional extra works requested ie. power of attorney or more complex legal works.

Please feel free to contact the fundraising team at anytime on 01752 898135 for details of our next upcoming Will Week or to discuss how you can leave a legacy to Dame Hannahs.

## Do I need to draw up a new Will?

If you do not wish to alter the contents of your existing Will other than to include a gift to the Dame Hannah Rogers Charity you can amend your current Will by preparing a document called a codicil. A codicil needs to be signed and witnessed in accordance with the same legal formalities as a Will and we therefore recommend that you consult a solicitor to ensure that the codicil is valid and your wishes will take effect. You will find a codicil form on page 12.

## Can I save tax by leaving a gift to the Dame Hannah Rogers Charity?

A gift to the Dame Hannah Rogers Charity in your Will does not attract inheritance tax, which may save tax that your estate would otherwise have to pay.

Tax is a complex area of law and we recommend you take specialist independent advice, particularly if you have substantial sums to gift to individuals and charities. Your advisor can assist in drafting your Will to ensure gifts are transferred in the most tax efficient way and therefore give the greatest value to the individuals and charities concerned.

Page intentionally blank

# Your codicil form

To add the Dame Hannah Rogers Charity as a beneficiary to your current Will, ask a solicitor to help you complete this form and keep it safe with your Will. If you haven't yet made your Will, you won't need this form.

I (full name)

Of (address)

Postcode:

I declare this to be a  First  Second  Third Codicil to my will,  
dated and made on \_\_\_ / \_\_\_ / \_\_\_\_\_ (day/month/year)

I give (please tick as appropriate)

The following proportion of the residue of my estate

The following specific item(s), namely

The sum of £

Dame Hannah Rogers Charity (Charity Registration No. 1194836), Woodland Road, Ivybridge, Devon PL21 9HQ for its general charitable purposes, and I direct that the receipt(s) of the duly authorised officer of the Dame Hannah Rogers Charity shall be sufficient discharge of my Executor/Trustees.

In all other respects I confirm my Will and any other codicils there to.

Signed

Date

# Your codicil form continued

Please ensure that you sign this form in the presence of two independent witnesses.

**The following people cannot witness your codicil:**

- Your executor / Your executor's spouse
- A beneficiary of your Will / A beneficiary's spouse.

---

## Witness one

I (full name)

Of (address)

Postcode:

Signed

Date

---

## Witness two

I (full name)

Of (address)

Postcode:

Signed

Date

# Your reply form

It would be a huge help if you could let us know your intentions – whatever they may be. Please tell us by filling out this form and returning it, postage free to:

**Dame Hannah Rogers Charity FREEPOST RRKJ-UYAY-TATR, Ivybridge, Devon , PL21 9HQ**

Mr  Mrs  Ms  Miss  Other \_\_\_\_\_

**First name**

**Surname**

**Address**

**Postcode:**

**Email**

**Mobile**

**Telephone**

**My intentions**

I have already included the Dame Hannah Rogers Charity in my Will

I intend to include the Dame Hannah Rogers Charity in my Will

**My bequest**

is a pecuniary gift - a fixed sum of £

is a residuary gift

is a specific item of

**You may wish to give further details below.**

If you would like to tell us why you chose to include the Dame Hannah Rogers Charity in your Will, or why you began supporting us to begin with, please use the space below to do so. We would love to find out a little more about someone who's supporting our work so generously.

[www.discoverhannahs.org/support-us](http://www.discoverhannahs.org/support-us)

01752 898135 ✉ [supportus@discoverhannahs.org](mailto:supportus@discoverhannahs.org)

Ivybridge, PL21 9HQ

📘 /discoverhannahs 🐦 @discoverhannahs

**hannahs**

dame hannah rogers charity

Dame Hannah Rogers Charity, Dame Hannah Rogers Trust 2019 Limited is a registered charity, number 1194836 and a company registered in England and Wales with number 11878746 whose registered office is at Dame Hannahs, Woodland Road, Ivybridge, Devon, PL21 9HQ