



# LEAVING A GIFT IN YOUR WILL

## CREATES A LASTING LEGACY



# INFORMATION PACK

## Why a gift matters

**Thank you so much for considering leaving a gift in your Will to Norwich Door to Door.**

Norwich Door to Door helps elderly and disabled people remain independent, socially active and connected to their communities.

Our aim has always been to reduce loneliness, overcome barriers to social inclusion and improve health and well-being.

The charity was established in 1992 by Bert Hadley, for his son Roger, who had cerebral palsy. The barriers Bert encountered trying to find transport for Roger motivated them to form Norwich Door to Door.

This was a much needed service for disabled and elderly people and addressed the need for accessible mobility transport. It ensured that people who were socially isolated and marginalised by a lack of transport, could live as independently as possible and take part in daily activities available to them yet out of reach because of this barrier.

The Door to Door journey started with a hired, single minibus and operated only two days per week but it quickly grew to meet the demand. Today, 33 years later, there are over over 750 registered users and 13 minibuses, which make on average 2,200 journeys a month. It has helped thousands of people over 3 decades remain independent, connected and socially included.

Founding member Roger still uses Norwich Door to Door and acknowledges the profound impact the service has had on his life, having provided him the freedom to live independently and without the barriers that a lack of transport creates. The legacy his father created lives on today through Norwich Door to Door. Your gift can help that legacy continue tomorrow.





“I lost my husband and I was a prisoner in my own home. Norwich Door to Door has given me my life back”.

“I don’t know what I would do without Norwich Door to Door, I can’t get out without them. I live on my own and all I see are the 4 walls and the TV”.

“Norwich Door to Door has improved my life entirely. Believe it or not, it’s the only pre-arranged day out I have a week, which I look forward to immensely”.



## What is a Will?

A Will is a legally binding document that states how you wish to distribute your assets after your death. An up-to-date Will is the only way to ensure your wishes are carried out exactly as you plan.

Without a Will, your estate may go to the Crown instead of your loved ones or the causes you care about, leading to unnecessary delay and stress. A Will also offers inheritance tax benefits for your beneficiaries.

The task of writing a Will can seem overwhelming but it is usually a simple process that most solicitors will be able to assist with and advise on how to leave a gift.

**As a charity, we cannot offer legal advice and recommend and encourage you to consult with an independent, professional legal advisor or solicitor when making or updating your Will. If you don’t already have a solicitor you can find one by contacting the Law Society on 020 7320 5650 or by visiting [www.solicitors.lawsociety.org.uk](http://www.solicitors.lawsociety.org.uk)**

# Things to consider when making your Will

## What you own and an estimate of its value

For example your house, savings and policies. It is also useful to note what you owe and include outstanding debts and loans, like your mortgage, when doing your estimate.

## Who your executor(s) will be

An executor is the person or people responsible for carrying out your wishes. It could be a family member, friend or solicitor and up to 4 people can be executors.

## Who your beneficiaries will be and what type of gifts you want to leave

Consider who would you like to leave a gift to. There are different kinds of gifts which are explained in more detail below.

## Where will you keep your Will

It is important to keep your Will safe. Be sure to inform your executor, a close friend or relative where it is kept.

## Types of gifts

### Residual bequest

This is a share, or all, of the balance of your estate once all other payments and legacies have been made (eg 10%). If you leave a residuary legacy you can ensure your family are taken care of before your charitable gift is made.

### Pecuniary bequest

This is a gift of a fixed sum of money (eg £1,000).

### Specific bequest

This is a specific personal item (eg a piece of jewellery, property or shares).



## Inheritance Tax

Inheritance Tax (IHT) is a tax on the estate of someone who has died. There's normally no IHT to pay if the value of your estate is below the £325,000 threshold or if you leave everything above the £325,000 threshold to your spouse, civil partner, a charity or a community amateur sports club.

Many people worry about IHT, but leaving a gift to charity in your Will can reduce the tax burden on your estate. Charities are exempt from IHT so leaving a gift to Norwich Door to Door would reduce the taxable value of your estate. Leaving 10% or more of your estate to charity could reduce the IHT payable from 40% to 36%.

***A solicitor or legal advisor is best placed to advise you on IHT rules and how they apply to your personal circumstances. The information provided here is for guidance only and correct at time of publishing. Please consult your solicitor as specifics can change.***

## Updating an existing Will

To update an existing Will you need to use a legal document called a codicil. This is useful when you wish to make changes to include new family members or leave gifts to charities.

## To make a gift in your Will, you will need the following:

- **Charity Name:** Norwich Door to Door Limited
- **Registered Society Number:** 27814R
- **Registered Address:** Woodlands House, Norwich Community Hospital, Bowthorpe Road Norwich, NR2 3TU

## Example wording:

*"I give to Norwich Door to Door, Registered Society Number 27814R, of Woodlands House, Norwich Community Hospital, Bowthorpe Road Norwich, NR2 3TU, the residue (or \_\_% share residue) of my estate and I direct that the proceeds may be used for the general purposes of Norwich Door to Door".*

If you are considering remembering Norwich Door to Door, please let us know so that we have the opportunity to express our gratitude and to tell you more about how your gift will be used.

Any information provided to us is non-binding and will be held in the strictest confidence. We understand that situations change and you always have the right to change your mind about your gift.



## Our promise to you

We promise to honour your legacy by using your gift with the intention in which it was given

### Our promise means we will:

- Understand that family and loved ones come first.
- Use your gift to maximise the impact it can make.
- Respect your privacy. If you decide to leave a gift in your Will to Norwich Door to Door, we would love to be able to thank you; however, we respect your choice if you prefer not to inform us.
- Understand that leaving a gift in your Will is a highly sensitive decision. We will never pressure you.
- Treat you with sensitivity and respect and all correspondence will be held in the strictest confidence.



**The information provided is for guidance only and should not be considered legal advice. We recommend speaking to a legal representative before making or altering your Will.**

Registered Society 27814R and a charity registered with HMRC XR25792R  
Registered address **Norwich Door to Door** | Norwich Community Hospital | Bowthorpe Road | Norwich | NR2 3TU



**Website:** [www.norwichdoortodoor.org.uk](http://www.norwichdoortodoor.org.uk)  
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