



A guide to making a Will
and including a gift to
Parkinson's UK

PARKINSON'S^{UK}
CHANGE ATTITUDES.
FIND A CURE.
JOIN US.

Thank you

Thank you for finding out about including a gift to Parkinson's UK in your Will.

Gifts in Wills are hugely important to us as they fund over a third of our work and help us plan for the future.

By supporting Parkinson's UK in this way, you could leave a lasting legacy – helping us find a cure and improve life for everyone affected by Parkinson's.

In this guide you can read about how the legacies we have received in the past are funding our work today and how your gift will impact our future.

Plus there are answers to the questions we are often asked about the Will making process.

You can also take advantage of our discounted Will writing services – see the enclosed sheet to find out more.

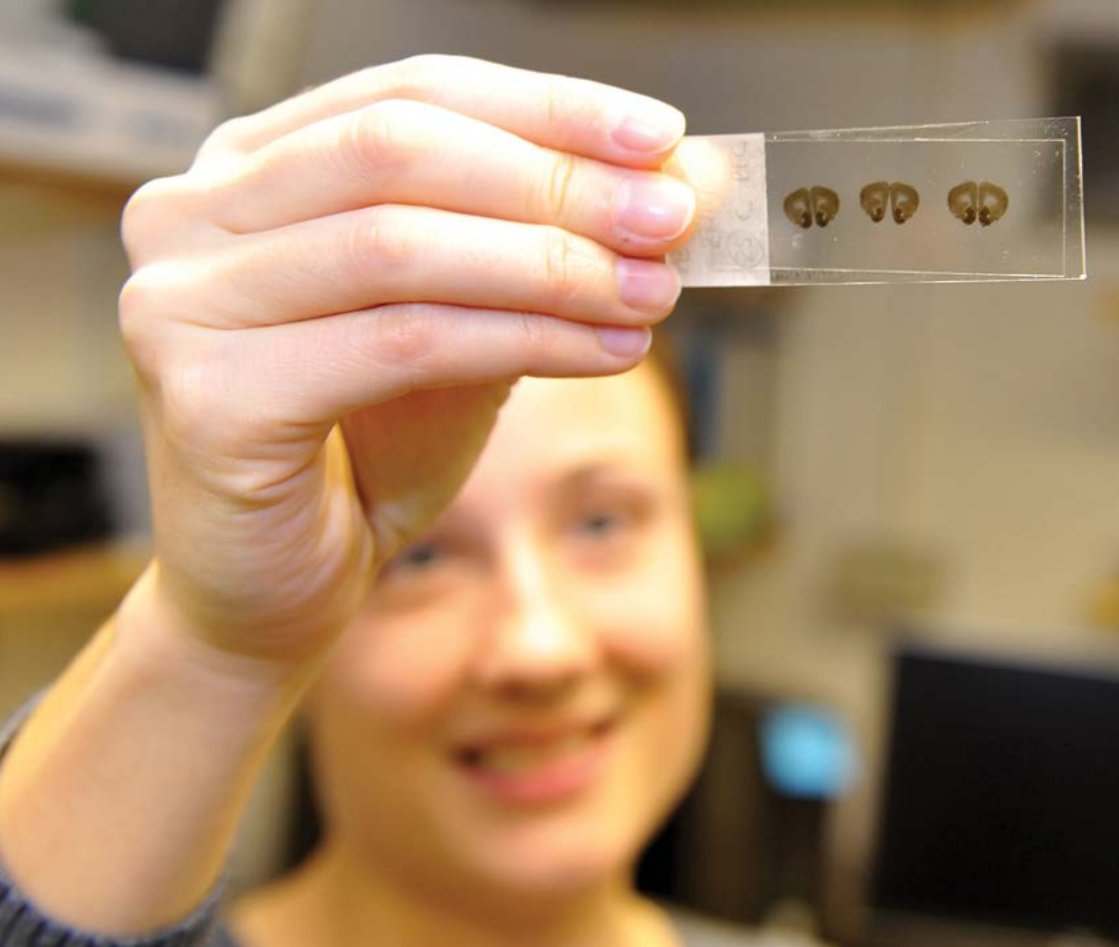
Any gift, large or small, makes a difference – enabling us to always be here for everyone affected by the condition.

Thank you for your support. Together we can bring forward the day when no one fears Parkinson's.



Steve Ford
Chief Executive,
Parkinson's UK





Our ambition

Our ultimate ambition is to find a cure and improve life for everyone affected by Parkinson's.

As our work is totally dependent on donations, it's only with your help that we can continue to fund our vital research projects, and provide expert support and information to everyone in the Parkinson's community.

Everything we do is based on what people with Parkinson's, their families and carers have told us would make the biggest difference to their lives.

By remembering us in your Will, you'll be by our side as we drive better care, treatments and quality of life.

How your gift will help

Better treatments and a cure – faster

Current Parkinson's drugs aren't good enough. They don't stop, slow down or reverse the condition – they just mask it for a time. And they can have distressing side effects.

While there are a range of therapies, the main drug people rely on hasn't changed for over 50 years. This just isn't good enough.

We're ready to drive forward the research community to develop better treatments, faster.

So far, we've invested more than £80million in groundbreaking research.

By leaving a gift in your Will, you can help us continue to lead, influence and fund research to ensure new and better treatments.

Empowerment to take control

Living with Parkinson's can be challenging, and people have told us that they want to feel more in control of their lives.

We provide expert information on every aspect of Parkinson's so that people affected by the condition can stay in control of their lives.

We do this through our:

- website
- confidential helpline
0808 800 0303
- UK-wide team of Parkinson's local advisers
- information resources
- self-management courses

We also offer friendship and support to everyone affected by Parkinson's.

Our local networks allow people to meet others affected by the condition and get involved in local social and therapeutic activities.

And our online discussion forum offers the opportunity to share experiences with other people online.

Quality services as standard

The right care at the right time is vital, but access to high-quality and consistent services varies greatly across the UK.

That's why we campaign to make sure people living with Parkinson's have access to the support they need.

Through the UK Parkinson's Excellence Network, we work in partnership with professionals and decision makers to ensure high-quality care for everyone affected by Parkinson's.

If you have any questions about how your gift will help, please contact our Legacy team on **020 7963 9344** or **legacies@parkinsons.org.uk**

There's also lots of information about leaving a gift in your Will at **parkinsons.org.uk/legacy**





Why I'm leaving a gift

Peter, a Parkinson's UK supporter, explains why he plans to leave us a gift in his Will.

"I want to do everything I can to help make sure that everyone affected by Parkinson's gets the help they need to cope with their symptoms.

"This is why I give to Parkinson's UK. Their research and services have already made a real difference. In fact, I've personally

benefited from their marvellous nursing care.

"But, more than anything, I want to help find a cure so future generations won't have to suffer. That's why I'm leaving a gift to Parkinson's UK in my Will.

"I've taken care of my children and it gives me great pleasure to know that, when I'm no longer around to contribute, my money will help to fund the research that could one day find a cure."

7 easy steps to leaving a gift in your Will

- 1** Work out the value of your estate, ensuring that you include property, investments and any debts.
- 2** Choose the people or charities you would like to include in your Will. Many supporters choose to leave a share of their estate to Parkinson's UK as this type of gift won't lose its value over time.
- 3** Appoint your executors – the individuals responsible for ensuring that your wishes are carried out. They will be named in your Will.
- 4** Visit a solicitor and have your Will drafted. See the enclosed *Discounted Will writing services* sheet to find out how you can have a Will made or updated through our Will service providers.
- 5** Keep your Will somewhere safe. Your solicitor will often look after it for you, but you may wish to retain your own copy too.
- 6** Tell a relative or close friend where the original copy of your Will is stored.
- 7** If you have already included a gift to Parkinson's UK in your Will, we'd love to hear from you to thank you for your support. But that's entirely your decision – we do not need to know.

Amending your Will

If you already have a Will and would like to make Parkinson's UK one of your beneficiaries, you can easily amend your Will by completing the enclosed codicil form with your solicitor, and storing it with your Will.

Your questions answered

Who should I appoint as an executor of my Will?

We recommend appointing a professional executor (for example a solicitor or a bank), as well as a family member or friend to provide advice and assistance to the co-executor.

Please note, however, that you shouldn't appoint a professional executor without first finding out their fees. We also recommend that you check that they are willing and able to be your executor.

If you do not have a suitable executor, Parkinson's UK can act for you. For more information please call our Legacy Administration Manager on **020 7932 1301**.

How can I select a solicitor?

As a Parkinson's UK supporter you can take advantage of our discounted Will writing services. Information about this is enclosed with this guide. Alternatively, you can find solicitors in your area who specialise in Wills, probate law and tax law on the Law Society website (www.lawsociety.org.uk).

Before appointing a solicitor, we recommend that you confirm what they intend to charge for preparing your Will or acting as an executor.

What information do I need in order to make a gift to Parkinson's UK?

To include a gift in your Will simply take the following details to your chosen solicitor or professional Will writing provider:

Charity name:

Parkinson's UK

Charity address:

Parkinson's UK
215 Vauxhall Bridge Road
London SW1V 1EJ

Charity number:

258197 (England and Wales)
or SCO37554 (Scotland)

What type of gift makes the most difference?

Any gift to Parkinson's UK will have an amazing impact. Many supporters choose to leave a share of their estate, as this type of gift won't lose its value over time.

Can I specify that my gift is used for a particular area of work?

The majority of supporters leave their gift for us to use wherever





the need is greatest. This helps us to ensure that a gift makes an incredible difference, however it is spent.

However, if you'd like to leave a gift to a particular area of our work, please contact our Legacy team on **020 7963 9344** or **legacies@parkinsons.org.uk**

Should I put together a new Will?

If you only want to make a small change to an existing Will, to include a gift to Parkinson's UK, you can amend it by preparing a codicil form.

This needs to be both signed and witnessed with the same legal

formalities as a Will. A codicil form is enclosed with this guide, but you should consult a solicitor to ensure that it is valid.

Can I save tax by leaving a gift to Parkinson's UK in my Will?

A gift to Parkinson's UK in your Will is not subject to inheritance tax. This may save tax that your estate would otherwise have to pay.

Inheritance tax will be paid on any part of your estate that is greater than the nil-rate band (also called the tax-free threshold).

The nil-rate band is set by the UK Government and is currently £325,000.

So, if your estate is worth less than £325,000 after anything you owe is taken out, there won't be any inheritance tax to pay. Anything above the nil-rate band is taxed at 40%.

If you leave a gift to a charity in your Will, it will be deducted from your estate before the amount of inheritance tax is calculated.

If you leave 10% or more of the net value of your estate to

charity, any part of your estate that is subject to inheritance tax will be taxed at 36% rather than 40%.

There are also some additional exemptions in connection with inheritance tax that might apply to your estate depending on your individual circumstances.

If you are married or in a civil partnership, your estate may benefit from a transferable nil-rate band that could double the inheritance tax allowance, currently £325,000, up to £650,000.

Also, from April 2017, the UK Government introduced a further potential increase to the nil-rate band allowance if you own a home and intend to bequeath it to your direct descendants.

Inheritance tax is a complicated area and very much depends on your personal circumstances.

We therefore recommend speaking to a legal professional who can advise you on the details as they relate to you.

Further information can be found at www.gov.uk/inheritance-tax

How gifts are helping our search for better treatments

We're adopting a radical new approach to Parkinson's research – tackling the critical road blocks, filling in the gaps and investing in big ideas that will speed up the whole process and deliver treatments to the people who need them, faster. The gifts we have received from supporters in their Wills are helping to fund this new approach.

UNLOCKING



We're backing the best and brightest minds to unlock the ideas that will lead to new treatments, and one day a cure.

We are currently supporting over 50 groundbreaking Parkinson's research projects worth over £20million across England, Scotland, Wales and Northern Ireland.

INVESTING



We invest in the best ideas, wherever they come from, and rapidly turn them into treatments that can be tested and progressed.

Our new Parkinson's Virtual Biotech fast-tracks the most promising scientific discoveries to develop and test treatments with the potential to transform life for people with Parkinson's.



IMPROVING



We believe clinical trials can work better so we're bringing the right people together to make it easier and faster for new treatments to get approved.

Through our Critical Path for Parkinson's research, we're working with researchers, drug companies and regulators to change clinical trials so they're smarter and more likely to succeed.

REPURPOSING



We're taking the fastest route to better treatments by tracking down drugs that are already approved and in use for other conditions, and have untapped potential for treating Parkinson's.

Developing new uses for existing drugs is called drug repurposing, and has the potential to fast-track new ways to treat Parkinson's.

Parkinson's UK legacy promise

These are the promises we make to anyone considering including a gift to Parkinson's UK in their Will:

- We know that your family and loved ones come first when writing your Will. We would like you to consider a gift once they are provided for.
- We would love to know if you have left us a gift in your Will so we can recognise your generosity and thank you for your support. However, we will always respect your privacy and you don't have to tell us your decision.
- You have the right to change your mind about a gift at any time and you do not need to tell us of your decision.
- We'll use your gift wisely – for every £1 donated today, 80p is spent on making life better for people with Parkinson's and 20p is spent on raising the next £1.
- Any gift you leave will be handled with care, sensitivity and respect.



If you would like to tell us why you've chosen to leave a gift to Parkinson's UK in your Will, we'd love to hear from you. It's entirely your decision, and we will never ask about the size of your gift.

Parkinson's UK Legacy team
215 Vauxhall Bridge Road
London
SW1V 1EJ

020 7963 9344
legacies@parkinsons.org.uk

Discounted Will writing services

We've partnered with two Will writing service providers so you can make a simple first Will or update a current Will without having to worry about expensive costs.

You don't have to include Parkinson's UK in your Will to take advantage of either service, but we hope you'll consider a gift to us once friends and family have been provided for.

The National Free Wills Network (UK wide)



The National Free Wills Network comprises many different charities across the UK, including Parkinson's UK. It offers free Will writing services to the charities' supporters.

Through the National Free Wills Network you can have a Will made or updated for free via a local solicitor. This can be a single Will or joint Will (a Will made with your spouse or partner).

Parkinson's UK, as a partner of the network, will cover the cost at a special discounted rate. Only solicitors recognised by the Law Society are recruited to the Network.

How do I join?

To register your interest, please contact the Parkinson's UK Legacy team. Call **020 7963 9344**, email **legacies@parkinsons.org.uk** or visit **parkinsons.org.uk/willwritingpartners** and complete our online form.

We will then pass on your contact details to the National Free Wills Network, who will send you a pack containing details of participating solicitors in your area.

This is a limited offer available across the UK.

The Goodwill Partnership England and Wales



The Goodwill Partnership is the largest distributor of home-visit solicitor-provided Wills.

You'll be visited at home by a trained financial professional – not a solicitor, but someone with in-depth understanding of the process – who will take your instructions. These will then be passed to a panel of solicitors who will provide your Will.

The discounted rates are:

£98 + VAT for a single Will

£96 + VAT for a second Will for your spouse or partner

Call **0844 669 6148** and quote Parkinson's UK for your discount.

Or visit **www.thegoodwillpartnership.co.uk/parkinsons-uk**

Your codicil form

We always recommend that you seek advice from your solicitor when you make or change your Will.

If you have already made a Will and would like to include a gift to Parkinson's UK, you can make the addition by asking your solicitor to draw up a new Will.

Alternatively, you can complete a codicil and take it to your solicitor, who can simply include it with your Will to ensure your wishes are carried out.

Here is some information on how to fill out a codicil form:

- You must have two witnesses over the age of 18. A witness must not be a beneficiary or guardian named in the Will or codicil.
- All three of you must be together throughout the signing ceremony.
- The two witnesses should sign in your presence and in the presence of each other, adding their addresses and occupations.

A codicil form can be found inside.

I (full name) _____

Of (address) _____

_____ Postcode _____

I declare this to be the first second third
codicil to my Will.

/ /

(day/month/year of original Will)

I leave the sum of (amount in figures and words)

£ _____

or the following specific gift(s) namely _____ to
Parkinson's UK, 215 Vauxhall Bridge Road, London, SW1V 1EJ.

A registered charity in England and Wales no. 258197 and in Scotland
no. SC037554 for its general charitable purposes absolutely. I direct
that the executors of my estate enact these requests as if they were
part of my last Will and testament.

In the presence of the following witnesses, who witnessed and
subscribed this codicil at my request and in my presence.

Signature _____

Date _____

Witness one

Name _____

Address _____

_____ Postcode _____

Occupation _____

Signature _____

Date _____

Witness two

Name _____

Address _____

_____ Postcode _____

Occupation _____

Signature _____

Date _____



To learn more about making a Will or amending your current one to include Parkinson's UK, please contact our Legacy team:

020 7963 9344

legacies@parkinsons.org.uk

Or visit **parkinsons.org.uk/legacy**

Every hour, someone in the UK is told they have Parkinson's – a brain condition that turns lives upside down, leaving a future full of uncertainty.

Parkinson's UK is here to make sure people have whatever they need to take back control – from information to inspiration.

We want everyone to get the best health and social care. So we bring professionals together to drive improvements that enable people to live life to the full.

Ultimately, we want to end Parkinson's. That's why we inspire and support the international research community to develop life-changing treatments, faster. And we won't stop until we find a cure.

**Together we can bring forward the day
when no one fears Parkinson's.**

Parkinson's UK
215 Vauxhall Bridge Road
London SW1V 1EJ

Free confidential helpline **0808 800 0303**
(Monday to Friday 9am–7pm,
Saturday 10am–2pm). Interpreting available.
Text Relay **18001 0808 800 0303**
(for textphone users only)

hello@parkinsons.org.uk
parkinsons.org.uk