



Leaving a gift in your will



South Essex Advocacy Services

What will your legacy be?

Many people in Southend, Basildon, Rochford and Rayleigh need help to manage their day-to-day lives. In particular, people who are isolated, have mental health problems or who are elderly can struggle to make their voice heard regarding their healthcare, accommodation, finances and wellbeing. They can be ignored, desperate for someone to speak on their behalf.

South Essex Advocacy Services (SEAS) supports people by enabling them to reach important decisions in their lives.

We are inviting you to support our vital, and often overlooked work, by leaving us a gift in your will.



About SEAS

SEAS was established in 1994 as South East Essex Advocacy for Older People. The charity now supports vulnerable people across south Essex. Our staff and volunteers help adults:

- with mental health problems
- with learning disabilities
- who lack mental capacity
- experiencing financial abuse
- living in poverty
- with dementia

Our support helps to increase wellbeing and independence, ensures that people can receive the right care and support from social services and that they are in suitable accommodation. Each year we help in excess of 1,000 clients.

Sadly, each year we need to support more and more adults. As a longstanding local charity, we are inviting you to support our work in the future, by leaving us a gift in your will.

We can provide support and assistance with:



How you can support our work

After ensuring that family and loved ones are provided for, many people chose to leave gifts to charities in their will as a way for their memory to live on.

By choosing to support SEAS in this way, you could improve the lives of vulnerable local people for years to come.

You do not have to pledge large sums or your entire estate to charity; even small amounts will help to support our essential work.

If you already have a will, the easiest way to include SEAS is to add what is called a Codicil.

This is a small legal note or addition to your will. If you do not have a will, we strongly recommend you get one, more for your own protection than anything else.

To make a will we recommend you contact a solicitor, or specialist will-writing service.

There are two ways to give: a Pecuniary gift: this is a specific item or amount; and a Residuary gift: this is a proportion of your estate after all other gifts have been made.



Clients we have supported

Tom's story

Tom was 60 years old. He had suffered a heart attack and struggled to leave his flat, which was in a high rise block in Southend. Tom was lonely. He would often invite strangers into his home for company, but he was robbed several times. Tom was scared and didn't want to live in his flat any more, but he didn't know what to do.

SEAS heard about Tom in a meeting with his carers. We went to see him, spending time with him to listen to his problems and discuss with him his options.

Tom told us that he wanted to move, and said that his sister lived in Eastbourne. Ideally he wanted to move closer to her, but he didn't know whether he would be able to.

We carried out a benefits check to ensure that Tom was receiving the correct entitlements. We also spoke with Tom's sister and she was in favour of the move. We applied for housing with Eastbourne Council and were able to secure Tom a place in sheltered accommodation, a few minutes away from his sister.

We arranged for a local charity to transport Tom and his belongings to his new home. Tom is now settled in his new home; he is closer to his family, is less isolated and lonely and is no longer fearful of being a victim of crime.

A couple of other examples:

There was a carer who bought her own shopping using her elderly client's money. This left her client unable to buy food or pay for heating. Following a report to the care agency, the carer was suspended whilst an investigation was made by Social Services and the police. DBS were notified and the carer was prosecuted.

A son and daughter took all their mother's benefits for drugs, and took loans out in her name, causing her to be in a lot of debt. We worked with the banks and had all the debts written off.

Suggested wording for your will

The law requires very precise wording in your will to avoid any misunderstanding. The following wording could be used if you would like to leave a gift in your will to SEAS.

For a **pecuniary, or specific legacy** I give the sum of £xxx (or the item specified) to South Essex Advocacy Services, Unit 2, 225-235 West Road, Westcliff-on-Sea, Essex, SS0 9DE. Registered charity number 1164092, for its general charitable purposes. I further direct that the receipt of the Secretary, or other authorised officer for the time being of the charity shall be a full and sufficient discharge for this legacy.

For a **residuary legacy** I give all (or xxx% share) of the residue of my real and personal estate, which I can dispose of by will in any manner I think proper to South Essex Advocacy Services, Unit 2, 225-235 West Road, Westcliff-on-Sea, Essex, SS0 9DE. Registered charity number 1164092, for its general charitable purposes. I further direct that the receipt of the Secretary, or other authorised officer for the time being of the charity shall be a full and sufficient discharge for this legacy.

It is also recommended to include the following clause, whichever wording you use: If at my death any charity named as a beneficiary in this will, or any Codicil hereto has changed its name, or amalgamated with, or transferred its assets to another body, then my Executors shall give effect to any gift made to such charity as if it had been made (in the first case) to the body in its changed name, or (in the second place) to the body which results from such amalgamation, or to which such transfer has been made.

Adding a Codicil to your existing will

If you already have a will you can amend it at any time by adding a Codicil, using the example wording below: "I (name) of (address) declare this to be the (first/second...) Codicil to my will dated and made the (day) of (month), (year). In addition to any legacies given in my said will I give the sum of £xxx (amount in figures and words) to South Essex Advocacy Services, Unit 2, 225-235 West Road, Westcliff-on-Sea, Essex, SS0 9DE. Registered charity number 1164092, for its general charitable purposes. I further direct that the receipt of the Secretary, or other authorised officer for the time being

of the charity shall be a full and sufficient discharge for this legacy.”

What could a gift in my will achieve?

A legacy gift helps us to achieve our objective; to support vulnerable people in south Essex who are in need of advocacy support. Your gift can help us to provide advocacy for people with dementia; helping to ensure that they can receive appropriate care and supporting families going forward. Your legacy gift can also be used to ensure that victims of financial abuse can be supported and protected from further harm. We promise that we will use your gift to help vulnerable people across south Essex, helping to improve their welfare and wellbeing.

How will my gift be acknowledged?

You can leave instructions as to how you would like your gift to be acknowledged, either with your solicitor or with the executors of your will. As a matter of course, SEAS will usually acknowledge your gift with a receipt to your executors. We will usually keep all legacy gift information confidential unless we receive a specific request to the contrary.

How will this affect inheritance tax on my estate?

Leaving a gift to SEAS could substantially reduce, or even eliminate the inheritance tax that would be due to your estate, as charitable donations of this kind are not liable for tax. Your solicitor will be able to provide you with more information.

Do I need to tell SEAS that I have left a legacy gift?

You do not need to let us know that you have chosen to support us in this way. However, it can make the fulfilment of your gift run much more smoothly.

Can I speak with someone at SEAS about my gift?

Of course; please contact our Chief Executive, Paula Blundell. She will be happy to inform you of our work and provide you with further details of what your gift could achieve. Our contact details are on the following page.

South Essex Advocacy Services (SEAS)
Unit 2, 225-235 West Road, Westcliff-on-Sea, Essex, SS0 9DE
01702 340566
www.southessexadvocacy.org
advocacy@southessexadvocacy.org

Registered Charity Number 1164092