

## Your legacy is our lifeline

It's more than a gift in your Will.

After taking care of your loved ones, please think about leaving a gift to OOSO and help future patients and their family and friends.

All gifts in Wills are important regardless of size and are free from Inheritance tax.

The contents of your Will are private, and we would never directly ask you to share your intentions. However, to help us going forward it would be helpful if you could tell us whether you are thinking about leaving a gift to us in your Will. This also gives us an opportunity to thank you and invite you to see how your gift could be used.

A gift in your Will costs nothing now but could be the most important gift you ever make.

If you need help in making a Will you could contact Peter Aldous of Abbey Wills ([www.abbeywills.co.uk](http://www.abbeywills.co.uk)) on 01367-250-289.

## Leaving a legacy in your Will

A legacy in your Will to OOSO will be free of Inheritance Tax because we are a registered charity in England and Wales. Inheritance Tax is charged at 40% on the value of your estate over the nil rate band (£325,000 in 2014). The situation is different for married couples. Also, if you give more than 10% of your estate to charity, Inheritance Tax can be reduced to 36% for the balance of the estate above the nil rate band. Your solicitor can look at your circumstances and advise you on how Inheritance Tax might impact on your estate.

### **How to leave a gift to OOSO**

You can give a cash legacy to OOSO or you can give the whole of, or a share of, your estate to OOSO. You could also give specific items to OOSO; however, please remember that these may go up or down in value, so it may be better to give an amount rather than an item.

### **Cash Legacy**

If you already have a Will, you might be able to make a Codicil to the Will so that the legacy to OOSO is inserted into your existing Will. A Codicil is an addition to a Will which may change, modify, delete, extend or add to the Will. You should speak to your solicitor about how to make a Codicil.

**Suggested wording for a cash legacy is:**

*“I give £[AMOUNT] to Oxfordshire Oesophageal and Stomach Organisation (also known as OOSO) registered charity number 1152733 of 12 The Glebe, Aynho, Banbury, Oxfordshire, OX17 3AZ for its general purposes and I declare that the receipt of the Treasurer or other proper Officer for the time being of OOSO shall be a good and sufficient discharge to my Trustees”.*

**Share of your estate**

**Suggested wording for a share of your estate is:**

*“Subject to the payment of my debts and funeral and testamentary expenses I give [THE WHOLE] / [X PER CENT] of my estate not otherwise disposed by this my Will or by any codicil to it to Oxfordshire Oesophageal and Stomach Organisation (also known as OOSO) registered charity number 1152733 of 12 The Glebe, Aynho, Banbury, Oxfordshire, OX17 3AZ for its general purposes and I declare that the receipt of the Treasurer or other proper Officer for the time being of OOSO shall be a good and sufficient discharge to my Trustees”*

**Finding a Solicitor**

If you want to find a solicitor near you, you can go to

<http://solicitors.lawsociety.org.uk/> or the “find a professional adviser” section of [www.rememberacharity.org.uk](http://www.rememberacharity.org.uk)