



Will Planning Pack



Registered Charity Number 1167783





Make A Will Month Planning Pack

Thank you for choosing to support Grace Kelly Childhood Cancer Trust and write your Will through our March Write a Will initiative. With your support we can continue to offer our vital services and continue our fight against childhood cancer. All support and services at Grace Kelly Childhood Cancer Trust are provided free of charge, so please do give generously.

A group of solicitors are generously giving you their time, free of charge to draft a *basic Will. In return, all we ask is that you make a donation to Grace Kelly Childhood Cancer Trust. We are suggesting around half the cost you would have paid for your Will:

£90

donation for a single
basic Will

£160

donation for a pair of basic
'mirror' Wills

* Please note- if you require non-standard advice, for example around inheritance tax or trusts. The solicitor will quote separately for any such work, if you wish to proceed with this, payment for the extra advice will be payable to the solicitors direct.

Participating solicitors will allocate appointments on a first come first served basis, so please book early to avoid disappointment.

Within this pack you will find:

- a list of participating firms and solicitors.
- a Will Planner to complete and take with you to your appointment with your chosen solicitor.
- a donation form to complete and take with you to the solicitor or you may like to go online and make a donation, for which you will be sent a receipt. It is very easy to take part.

To get started simply:

- Select a solicitor from the list in this pack
- Phone and make a convenient appointment with your solicitor of choice – please make sure you mention Grace Kelly Childhood Cancer Trust March Make a Will month, when making the appointment. (Grace Kelly Childhood Cancer Trust cannot make appointments)
- Complete the Will Planner sheet prior to your appointment and take this with you.
- Take your donation with you to the appointment- cheques made payable to 'Grace Kelly Childhood Cancer Trust' or go online to pay by card or PayPal on our website at www.gkcct.org/donate. You will be issued with an email receipt if you donate online, to take with you to your appointment.

Details of Participating Solicitors

We're incredibly grateful to the participating solicitors who are generously giving their time for free, so that every penny of your donation can go directly towards supporting families and children affected by childhood cancer.



Worcester Office

👤 Imogen D'Arcy

✉ Imogend'arcy@talbotslaw.co.uk

☎ 01384 889345

🏠 23 Foregate St, Worcester WR1 1DN

Kidderminster Office

👤 Gill Holder

✉ GillHolder@talbotslaw.co.uk

☎ 01562 702180

🏠 30 Church St, Kidderminster DY10 2AX



Secure Inheritance Legal Services

Secure Inheritance Legal Services local Will Advisor, Robert Colebrook, can provide consultations in your home, over the phone, or via Zoom.

👤 Robert Colebrook

✉ robert.colebrook@secureinheritance.co.uk

☎ 07980 880 456



Will Planner

We recommend completing this form and taking it with you when you go to your solicitor appointment

My Details

Title: _____ Forename(s): _____ Surname: _____

Address: _____

Tel: _____ Mobile: _____

Email: _____

Date of Birth: _____

Occupation: _____

Name (in full) of your Spouse/Partner: _____

Spouse/Partner Date of Birth: _____

Name(s) (in full) of your children and Date(s) of Birth: _____

And their addresses if no longer living with you: _____

Executors Details

Your Executors are responsible for distributing your property according to the directions set out in your Will. It is usually sensible to appoint at least two Executors.

Title: _____ Forename(s): _____ Surname: _____

Address: _____

Title: _____ Forename(s): _____ Surname: _____

Address: _____

Guardian Details

If you have any children under the age of 18, you should consider appointing at least one guardian. When one parent dies the surviving parent normally becomes the legal guardian, but it is of course possible that parents die together, or you may be a single parent.

Title: _____ Forename(s): _____ Surname: _____

Address: _____

Title: _____ Forename(s): _____ Surname: _____

Address: _____

Approximate Value of my estate

Your estate means the net value of all your assets as at date of death. It is a good idea to take this information so your inheritance tax position can be considered and because some assets may not be capable of passing in accordance with your Will.

House:

Contents:

Car:

Investments/Savings:

Other:

Specific Gifts

Details of specific gifts you would like to make in your Will - for example these could include items of Jewellery or Family Heirlooms. Include details of the item and the name and address of the person you wish to leave it to.

Cash Gifts

Details of specific cash gifts you would like to make in your Will. Include details of the amount you would like to leave and the name and address of the person you wish to leave it to.

Charitable Gifts

Many people like to leave money to a charity in their Will that they are passionate about.

If you leave 10% or more of your estate to charity, the rest of your estate may be taxed at a reduced rate of 36%, instead of the standard 40%.

So not only can you make a lasting difference to a cause close to your heart, but you could also help reduce the tax burden on the rest of your estate.

A gift in your Will costs you nothing now but can make a difference for years to come.

At the Grace Kelly Childhood Cancer Trust, we are dedicated to supporting children with cancer and their families, raising awareness of the signs and symptoms of childhood cancer, and funding vital research — because the children of today all deserve a tomorrow.

A gift left in your Will, no matter the size, could help us continue this essential work and make a lasting difference to the lives of the children and families we support.

Residuary Estate

Your Residuary Estate is the balance of your property after the payment of expenses and liabilities, distribution of any specific gifts, and payment of any cash gifts.

Title: _____ Forename(s): _____ Surname: _____

Address: _____

Percentage of Estate: _____

Title: _____ Forename(s): _____ Surname: _____

Address: _____

Percentage of Estate: _____

Title: _____ Forename(s): _____ Surname: _____

Address: _____

Percentage of Estate: _____

Title: _____ Forename(s): _____ Surname: _____

Address: _____

Percentage of Estate: _____

If any person(s) named above are under 18, at what age would you wish them to inherit other than 18:

Does any person(s) above have any special needs:

Notes

Use this space to make any notes of anything else you wish to discuss with your solicitor:

Making your donation

Your Details

Title: _____ Forename(s): _____ Surname: _____

Address: _____

Tel: _____ Mobile: _____

Email: _____

Are you in? Join us

We'd love to get in touch from time to time to keep you informed about the work of Grace Kelly Childhood Cancer Trust and provide you with exciting updates on our care, news and ways you can get involved. Please tick the box(es) below to indicate your preferences on how you want to hear from us:

- ☐ Post
- ☐ Email
- ☐ Telephone
- ☐ I do not wish to be contacted in the future

Grace Kelly Childhood Cancer Trust values your support and respects your privacy. The data we gather and hold is managed in accordance with the General Data Protection Regulations 2018. We collect, store and use personal information for fundraising and marketing purposes if we have a legitimate interest, if required to fulfil a contractual or legal obligation or if you have given us opt-in consent to do so. Please see our Privacy Notice on our website for further information. Grace Kelly Childhood Cancer Trust and its subsidiary companies will not sell your personal information but may need to share your details with third parties authorised to act on our behalf. If you would like to change your preferences or opt out of receiving all future communications from us, please call 01905 885777, email fundraising@gkct.org or write to Grace Kelly Childhood Cancer Trust, Cowsden Hall, Cowsden, Upton Snodsbury, WR7 4NZ

Details of Your Donation

I would like to make a donation to Grace Kelly Childhood Cancer Trust of:

- ☐ £90 - suggested donation for a single basic Will
- ☐ £160 - suggested donation for a basic pair of 'mirrored' Wills
- ☐ Other gift of my choice £ _____

Cheques payable to 'Grace Kelly Childhood Cancer Trust' to be taken to your solicitor's appointment.

To pay by card or PayPal please donate on website at www.gkcct.org/donate and you will be sent a receipt that you can take to your appointment with your chosen solicitor

We understand that making a Will is a private and personal matter, but if you have remembered Grace Kelly Childhood Cancer Trust in you Will and you are happy for us to know, please do so below:

- ☐ I/We have left a gift to Grace Kelly Childhood Cancer Trust in my/our Will

I/We have left the following gift

- ☐ I/We would prefer not to share this information

If paying at your appointment please hand these 2 pages to your solicitor in a sealed envelope marked private and confidential.

For any further information, or to discuss leaving a gift in your Will to Grace Kelly Childhood Cancer Trust, please contact the Fundraising Department, Grace Kelly Childhood Cancer Trust, Cowsden Hall, Cowsden, Upton Snodsbury, WR7 4NZ

Tel. 01905 885777 or email fundraising@gkcct.org

thank you
for your support