



How your legacy gift could help secure our future...



## What we do

**White Lodge Centre is a charity working with disabled people of all ages, from children and young people born with a disability to older people who may have an acquired disability. White Lodge Centre has supported thousands of disabled people and their families and carers in the Surrey area since 1962.**

The support that White Lodge Centre offers varies according to what an individual needs. From new parents wondering how to bring up a child with cerebral palsy, to disabled teenagers looking for adventure, to disabled adults seeking advice on how to maximise their independence, White Lodge Centre produces a tailor-made solution to the challenges that face disabled people in Surrey.

When it comes to your Will, we understand that your family and friends come first – and rightly so. But we hope that you may also remember the cause you believe in. A gift in your Will doesn't have to be large to make a difference. Just a small percentage of what is left after you have provided for your loved ones will ensure that we are here to support disabled children, young people and adults and their families for generations to come.

The good news is that Inheritance Tax isn't payable on any assets you leave to a registered UK charity as these transfers are exempt. Whether the legacy is large or small it will make a real and lasting difference to people's lives.

If you have included White Lodge Centre in your Will, or you decide to include us in the future, may we thank you for your kindness and generosity. We simply couldn't provide our services and support without you.

**If you would like to come and visit White Lodge Centre, perhaps to discuss what you would like us to do with your gift or see the difference your gift could make, please contact us today.**

## How do I make a Will?

The easiest way is to consult a solicitor. The Law Society can provide you with a list of solicitors in your area. For more information visit their website at [www.lawsociety.org.uk](http://www.lawsociety.org.uk)

## How can I help?

**By leaving money in your Will to White Lodge Centre, or naming us as one of the beneficiaries of a trust you set up, you can help shape the future of disabled people and help support families and carers for generations to come.**

**There are six ways to leave a gift to White Lodge Centre:**

- **The residue of your estate to White Lodge Centre**

You can leave White Lodge Centre the entire residue of your estate. This is what is left when all the specific gifts and other liabilities have been paid. If you would like to leave your residuary estate to White Lodge Centre, we suggest that you include the following wording in your Will:

*"I give all of the residue of my estate to White Lodge Centre (registered charity number 286238), Holloway Hill, Chertsey, Surrey KT16 0AE, for its general charitable purposes and I direct that the receipt of the treasurer or duly authorised officer shall be a valid and appropriate form of discharge."*

- **A percentage of your estate to White Lodge Centre**

You can leave White Lodge Centre a portion of the residue of your estate. If you would like to leave a percentage of your residuary estate to White Lodge Centre, we suggest that you include the following wording in your Will:

*"I give a ...% share of the residue of my estate to White Lodge Centre (registered charity number 286238), Holloway Hill, Chertsey, Surrey KT16 0AE, for its general charitable purposes and I direct that the receipt of the treasurer or duly authorised officer shall be a valid and appropriate form of discharge."*

- **A sum of money to White Lodge Centre**

If you wish to leave White Lodge Centre a sum of money in your Will, we suggest that you include the following wording:

*"I give to White Lodge Centre (registered charity number 286238), Holloway Hill, Chertsey, Surrey KT16 0AE, the sum of £... [amount in figures and words] to be used for its general charitable purposes and I direct that the receipt of the treasurer or duly authorised officer shall be a valid and appropriate form of discharge."*

- **White Lodge Centre as a beneficiary of your trust**

If you are thinking of setting up a discretionary trust in your Will for the benefit of a disabled family member while they are alive, you may decide that any sum of money left in the trust after their death will go to White Lodge Centre.

- **Reversionary gift**

A reversionary legacy enables you to pass your estate, or specific assets of your estate, to named individuals who will benefit throughout their lifetime. Following their deaths all, or some, of the estate is then passed to the beneficiaries as specified in the reversionary legacy.

- **Life insurance and death in service schemes**

This is typically linked to your pension and means that in the event of your death a tax free lump sum would be left to your beneficiaries.

\* Correct as of April 2011

## How do I change my Will?

If you have already made your Will but want to leave a gift to White Lodge Centre, all you have to do is make a codicil to your Will. This is an additional document to your Will which makes minor amendments to your Will – such as including a gift to White Lodge Centre. You should never make any amendments to the original Will document – either make a codicil or make a new Will. A codicil form is included in this pack for your use.

**Remember: All gifts to White Lodge Centre are free of inheritance tax and from April 2012 if you leave 10% or more of your estate to White Lodge Centre your total inheritance tax will be reduced to 36%**

If your total estate (e.g. your house and contents, car, investments and savings) is worth more than the inheritance tax threshold (currently £325,000\*), you may choose to give whatever is left to charity in order to minimise the inheritance tax paid on your death.

When you write your Will, your solicitor can advise you further on this. For further information about inheritance tax visit [www.hmrc.gov.uk/cto/iht.htm](http://www.hmrc.gov.uk/cto/iht.htm)



“ We were met with such warmth, empathy and respect and it was the first time that I felt that this could all actually be ok and we would find a way through this. On the surface Little Stars is a playgroup and White Lodge Centre a therapy centre. I can promise you that it is so much more than that...

Louise's Mum x

## Louise's Story

Louise was born three months prematurely and was diagnosed with cerebral palsy leaving her with permanent brain damage.

This affects her ability to walk unaided and has also caused severe epilepsy and feeding difficulties. At six months old Louise started weekly sessions at White Lodge Centre with a physiotherapist and speech and language therapist who worked closely together focusing on movement, positioning, communication and feeding.

At this time, Louise and her mum started attending weekly 'Little Stars' sessions, a play group for parents, carers and siblings of disabled pre-school children held at White Lodge Centre.

This group also gave Louise's mum the opportunity to meet other parents, chat, have a coffee and relax while Louise had fun.

Meeting other parents helped Louise's mum to gain an understanding and build confidence about overcoming the problems a disability can present. She was also able to relax in a safe environment without feeling different from other mothers.

## White Lodge Centre Legacy Charter

- We will always respect your privacy. We recognise and appreciate that your Will is completely personal to you.
- We also realise that, rightly, your family and loved ones will always come first.
- Because we are committed to making a difference to disabled children, young people and adults, we always encourage people to leave something to White Lodge Centre. But we recognise that it's your decision and you need to make it in your own time.
- You can tell us that you've left a gift if you want to, and we'd love to hear from you, but you don't need to and we won't keep asking.
- If you do choose to tell us, we will give you the choice about how we talk to you in the future about our work.
- We will use your gift carefully and cost effectively so that it has the greatest impact for our disabled children, young people and adults.
- We will give you the opportunity to be involved with the work we do that is made possible by your gift.
- At any time, you have the absolute right to change your mind about a gift in your Will to White Lodge Centre.
- We will handle whatever gift you leave us efficiently and also with care, sensitivity and respect.



White Lodge Centre supports disabled children, young people and adults, their families and carers in Surrey and the surrounding areas.

This is achieved by providing high quality, innovative and individually planned services.

**White Lodge Centre**

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