

IN SAFE AND CARING HANDS




CREATING A WILL RAISES SOME VERY PERSONAL QUESTIONS:

- ▶ What matters most to me?
- ▶ How can I leave a lasting legacy?
- ▶ And who can I trust to uphold my wishes after I am gone?



These are all questions that you will think about in your own time, on your own terms and very likely with your family and loved ones in mind. In this guide we'll show you how leaving gifts in Wills to **ALEX'S WISH** could provide a different future for families affected by Duchenne.



WHY ALEX'S WISH?



**At the time when
Alex was diagnosed
back in 2010 there
was little being done.**

Right now, there are over 60 clinical trials taking place around the world. We are making huge strides forward, and there is so much promise ahead of us.

Finding new effective treatments is no longer a pipedream.

For the very first time, with your help, we believe this generation will either be the last to die or the first to live.

And that's got to be worth fighting for!

Those with Duchenne need our support, because they are the ones fighting every day just to do the simple things we all take for granted.

They're getting weaker every day and they know it's happening and what lies ahead of them. But they keep on going. And more often than not with a big smile on their faces. And it's that inner determination and courage that makes them so determined and if they are determined to succeed we must be too.

At Alex's Wish we get our strength from raising thousands of pounds needed to accelerate research in to finding a cure for this terrible disease.

Knowing that we are fighting to help them. Going in to battle for them.

HOW A GIFT IN YOUR WILL MAKES A DIFFERENCE?

Your will is an opportunity to provide for the people and causes you most care about if, like us, you want to help all those affected by Duchenne Muscular Dystrophy

Our approach is sharply focused on advancing research – and getting treatments into the clinic and to patients as quickly as possible.

We actively seek out projects and possible therapies that could benefit this generation of patients. We invest globally in both basic science and translational research.

Gifts in Wills are a vital source of income to help end Duchenne

THERE IS NO NEED TO WORRY



Leaving a gift in your Will can make a huge difference to children with Duchenne. But in case you have any lingering questions before you read on, here are a few points worth remembering.



► FAMILY CAN STILL COME FIRST

You don't have to choose between looking after your loved ones and helping families affected by Duchenne. You can use your Will to do both – for instance by leaving a gift to Alex's Wish after friends and family have been taken care of. Every gift, no matter how big or small, has the power to make a real and lasting difference.

► YOUR WILL, YOUR WISHES

Making a Will is easy to put off, but it's the only way to be sure your wishes are carried out. Without one, you may leave your loved ones facing uncertainty

► GOOD FINANCIAL SENSE

Leaving a gift to charity in your Will can reduce the amount your estate pays in Inheritance Tax, meaning you can make an even greater difference to your loved ones and boys with Duchenne.

► EASING THE PRESSURE

Once you've made a Will, you and your loved ones can feel secure; and you can enjoy peace of mind knowing your wishes will be carried out.



HOW TO LEAVE A GIFT IN YOUR WILL TO **ALEX'S WISH**



Once you've made your decision, this straightforward guide will take you through everything you need to know about leaving a gift to Alex's Wish in your Will.

HERE'S WHAT IT COVERS:

- ▶ Information on the different types of gifts you can leave, to help you make the best decision for you and your loved ones.
- ▶ A guide to writing or updating your Will, taking you through the process from start to finish.
- ▶ Options for suggested wording that you can take to your legal adviser to make sure your wishes are carried out.



HOW TO MAKE OR UPDATE YOUR WILL

A Will can ensure that your loved ones will be taken care of and that your wishes are carried out when you die. And remembering Alex's Wish in your Will means our mission can continue to help this generation of boys to live. These are the five steps you need to take to make or update your Will:

- 1** Use your Will planner (next page) to add up the estimated value of your estate and make a list of people and/or organisations you'd like to leave money, property or possessions to.
- 2** Appoint one or more (up to four) Executors to carry out the terms of your Will. This can be a relative, friend or legal adviser.
- 3** Visit a legal adviser to draw up or update your Will (please let us know if you need any recommendations). If you're including a gift to Alex's Wish, please use our suggested wording over the page.
- 4** Make a copy of your Will, and make sure someone you trust knows where your original Will is kept (your legal adviser will often store it for you free of charge, or you can use the Probate Registry).
- 5** If you're remembering Alex's Wish in your Will, thank you. Your gift will make a real difference, if you'd like to let us know this is your intention, please email Emma at emma@alexswish.co.uk



WILL PLANNER

VALUE OF MAJOR ASSETS

Your home (or share in it)	£
Other property & Land	£
Cars & Vehicles	£
Home Contents incl. furniture & fittings	£
Items of particular value	£
Money in banks & building societies	£
Shares, investments, national savings and premium bonds	£
Insurance & Pensions	£
Other savings and assets	£
Total Assets (A)	£

WHAT ARE YOUR MAJOR LIABILITIES?

Mortgage	£
Loans & Overdrafts	£
Credit Cards	£
Credit or HP agreement	£
Other liabilities	£
Total Liabilities (B)	£

Total Assets (A) – Total Liabilities (B) = Total Estate Value	£
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TYPES OF GIFTS IN WILLS



There are three main types of gifts you can leave to Alex's Wish in your Will. We suggest you speak to your legal adviser to help you make the decision that's right for you. Every gift makes a difference and we want you to leave the right gift for your circumstances.

A RESIDUARY GIFT

This is where you set aside a portion of all your remaining estate after funeral expenses, debts and other gifts in the Will have been paid. Many people choose to leave this kind of gift because it helps make sure their loved ones are taken care of first.

A PECUNIARY GIFT

This is a gift of a specified sum of money. All gifts make a real difference, but it's worth remembering that the eventual value of this type of gift is likely to be impacted by inflation.

A SPECIFIC GIFT

This is a gift of a specific, named item. For example, it could be property, a piece of jewellery, a work of art or a car.





SUGGESTED WORDING FOR YOUR GIFT

Here is the suggested wording you need in order to include Alex's Wish in your Will:

UNRESTRICTED GIFTS

Many people choose to leave an unrestricted or general gift. It's the most helpful because it allows us to use your gift wherever the need is greatest. You can leave an unrestricted gift, which can be either residuary or pecuniary, using the words below:

"I give the sum of £ (or specify percentage of estate) to Alex's Wish, 168 London Road, Leicester LE2 1ND (registered charity number 1148845) for its general purposes and I direct that the receipt of the director or other proper officer for the time being of the said Alex's Wish shall be a good and sufficient discharge to my Trustees"

RESTRICTED GIFTS

You can also specify how or where you'd like your gift to be used by leaving a restricted gift. If you'd like to leave a restricted gift, please contact us to discuss the area of our work you'd specifically like to support. To leave a restricted gift, use the wording below:

"I give the sum of £ (or specify percentage of estate) to Alex's Wish, 168 London Road, Leicester LE2 1ND (registered charity number 1148845) for its general purpose and I express the wish but without creating any binding trust that this legacy be used in the (specify) areas and I declare that the receipt of the Director of the said Alex's Wish for the time being shall be a full and sufficient discharge for the said legacy."

You may wish to include a clause in your legacy if for whatever reason the Charity isn't there at the time of the legacy "IF ANY Charity or Charitable organisation which I have named as a beneficiary in this Will is found never to have existed or to have ceased to exist or to have become amalgamated with another organisation or to have changed its name before my death then the gift contained in this Will for such Charity or Charitable Organisation shall be transferred to whatever Charitable Institution or Institutions and if more than one in whatever proportions as my Trustees shall in their absolute discretion think fit and I EXPRESS the wish but without imposing any obligation on my Trustees that the gift be given to such Charitable Institution or Institutions whose purpose is as close as possible to those of the Charity or Charitable Organisation named by me in this my Will"



THANK YOU!

Your gift will help us achieve our goal. When you've had time to reflect and discuss your decision with those close to you, we'd love to know your intentions as it will help us plan for the future.

WE'RE HERE TO HELP

At Alex's Wish we can help you, if you have any questions please do not hesitate in getting in touch with our Legacy Giving Advisor:

Lisa Bacon (Mrs)

Salisbury Harding & Barlow
Solicitors
1 Berridge Street
Leicester
LE1 5JT
Tel No: 0116 2626052

Lisa is here to provide answers to any questions that you have with no obligations.

• For any other questions please get in contact with Emma Hallam at emma@alexswish.co.uk

ALEX's WISH
cure Duchenne