



Registered Charity No. 1118646



# Your Legacy Guide

# Welcome

Being partly funded by the NHS means that we rely on the kindness and generosity of our supporters to enable us to offer all the care and comfort patients and their families need following the diagnosis of a life-limiting illness.

From expert medical care to counselling and a wide range of support services, Sobell House prides itself on helping people live as well as possible in a way that suits them with access to the very best medical care as and when it is required.

Our dedicated team at Sobell House ensures patients under the care of the Hospice receive expert advice, alongside specialist medical care, and have access to practical, emotional and spiritual support.

By leaving a gift to Sobell House, you would be entrusting a lasting legacy of compassion, reassurance and dignity – helping us provide exceptional care and support for patients and their families in their time of need. You'll also be providing comfort for the loved ones left behind, knowing that help and support will always be available to them during the most difficult times.

For most of us, when we look back on our lives we want to know that we've made a difference in some way. That what we have achieved in life is not forgotten when we're no longer around. What happens to our money and the things that are most precious to us when we die should not be left to chance – that is why writing a Will is so important. Of course, making sure our loved ones are provided for should be at the top of our list, but if Sobell House is one of the causes close to your heart, then please, if you can, remember us in your Will too.



# About Sobell House

Since 1976, Sobell House has been providing specialist palliative care and support to people in Oxfordshire living with life-limiting illnesses. Our Hospice was founded on the principles of combining expert pain and symptom relief with holistic care to meet the physical, social, psychological and spiritual needs of our patients, their families and their carers. Our support begins from the moment someone is diagnosed through to palliative care and then ultimately end of life care. We also support families and carers, helping them cope with the pressure and strains of illness through to coping with bereavement and helping them move forward.

Sobell House is jointly funded by the NHS and Sobell House Hospice Charity. The charity fundraises to contribute around £2 million every year. With an ageing population, it is inevitable that demand for hospice care will grow, which makes the need to not only maintain our services but increase them, more important than ever before.

Our focus is on caring for the local community when they need us. This care is provided in our inpatient ward within the Hospice, through our Living Well service, our outpatients department, within Oxfordshire hospitals and in patients' homes. We find that once patients are being cared for by Sobell House, they feel a sense of calm and reassurance, knowing that they are in safe, expert hands. The key services funded by the charity are:



**In-house catering**



**Social care**



**Transport service**



**Chaplaincy support**



**Creative therapies**



**Bereavement care**



**Occupational therapy**



**Additional clinical staff**



**New services and building updates**

# Leaving a Gift

Why leave a gift to Sobell House?

Generous gifts of all sizes over the last 45 plus years have helped ensure specialist, compassionate care for thousands of patients and their families. Your legacy will help us to ensure that we can continue to provide the highest standards of hospice care to local people in the future.

Your gift will not only help local adults with life-limiting conditions but also their families and loved ones who might also need our services. We aim to make every moment and memory special for all those who visit us.

By leaving a gift in your Will, you can help safeguard future services.

Any amount, small or large is extremely valuable to us and will be put to excellent use through our dedicated work. Every penny really does count, with small legacies forming a large part of our income.

We hope that you will consider leaving a gift in your Will to Sobell House. Your generosity is greatly appreciated and received with our thanks. Leaving a legacy to Sobell House won't cost you a penny during your lifetime, but it will be a powerful way to be remembered by others in the future.

***DID YOU KNOW?*** Every year, half a million pounds of our running costs comes from legacies.

**£65** could cover the cost of bereavement counselling for someone struggling with their grief.

**£274** could fund a day of transport for patients and families across Oxfordshire.

**£600** could pay for a day's care for a patient on our specialist inpatient unit, where they will be cared for with compassion.

**£1000** could enable several families to receive emotional support from a social worker, including children.

3

# Greg and Penny

"My wife Penny was referred to Sobell House in the late summer of 2016 after a number of treatments in the Churchill Hospital for lung cancer. In all, Penny had three periods in the hospice for assessment and palliative care, together with outpatient consultations, and when at home had regular visits from the community palliative care team. I will always be grateful to everyone at Sobell House – doctors, nursing and care staff, therapists and all the support staff and volunteers – for doing as much as they possibly could to help Penny when she needed it, and to provide comfort and advice. When she went back in to Sobell for her last few days, she knew she was welcomed, reassured and made comfortable. I know she was at peace to be there.

After Penny died I was more than happy to update my will to include a legacy to the charity to help continue the wonderful care that Sobell House provides into the future. I would encourage anyone to consider leaving a gift in their will to Sobell House. I've seen first-hand the difference it makes."



4

# Your Will, your legacy

Your Will is one of the most important documents you'll ever write. It ensures your loved ones are looked after when you're no longer around and that your final wishes are respected.

But once your family and friends have been included, your Will is also a way for you to continue to support a cause close to your heart. More and more people are now leaving a gift in their Will, sometimes known as a 'legacy', to support the causes that matter to them.

Sobell House Hospice Charity depends on this type of gift. Gifts in Wills make up a quarter of all charitable income we receive and even a small sum can make a huge difference. There are three main ways you can leave a gift in your Will:

## A residuary gift

This is a share of your total estate (everything that you own that is of value) after all other payments (such as lifetime debts, tax and administrative expenses) have been deducted. Because a residuary legacy is a percentage of your estate it will keep its value over time.

## A pecuniary gift

A pecuniary gift is a fixed amount of money that you leave in your Will. It is a good idea to review pecuniary gifts regularly, as their face value can be lessened by inflation and turn out to be less powerful than you intended.

## A specific gift

A specific gift is when you leave a particular item of value – such as personal possessions, property or shares.



# Tracy and Helen

"In May 2019 we lost my darling sister Tracy. She was given - or should I say the whole family were given - the devastating cancer diagnosis five years prior to her death.

As cancer tightened its grip on her we became aware of Sobell House, but still we put the idea of Tracy ever needing such a place to the back of our minds. Tracy began to deteriorate at a fast pace and when it was suggested to her that she have an overnight stay she accepted. She did this more for us, her family, because she wanted us to be supported.

What we didn't appreciate is how much support and care that would mean. When I first walked through the doors of Sobell House it was with some nerves. It was the first hospice I'd ever visited and I was dreading finding my darling sister in some gloomy room with nothing to see or do. Well I couldn't have been more wrong if I'd tried. I was taken to Tracy's room which she was sharing with three other lovely ladies and I found her sitting in a fabulous armchair next to a window overlooking the golf course, laughing and chatting to a nurse.

We were made to feel like Sobell was our home and with its beautiful facilities and glorious gardens we accepted the inevitable when Terry, Tracy's husband, and I were taken aside to be told Tracy had just days to live. She was made as comfortable as possible, pain-free, and she died surrounded by her family. I really can't put into words how grateful I am for all the care that was given to Tracy and us all."



# Writing a Will

Writing a Will and keeping it updated is the only way for you to decide what happens to your property, money and personal possessions after you die. We recommend that you use a solicitor or use an established Will writing service such as Guardian Angel – **please see page 9 for more information on accessing this free service through Sobell House.**

There are five simple steps to help you prepare for writing a Will:

## Step 1 - Make a list of all your assets

It can be a good idea to list your assets and estimate their value. This is something you can do yourself, saving you time and money with your solicitor. Your assets include things such as property, shares, savings and other items of value you own. The sum of these assets is called your 'estate'.

## Step 2 - Make a list of what you owe

Always try to write down what you owe or are owed. Considering an outstanding mortgage, loans or bills will give you a far better idea of the value of your estate.

## Step 3 - Decide who you would like to benefit and how

Make a list of all the people and organisations – such as the charities you support – that you wish to remember in your Will and consider how you'd like to divide your estate between them.

## Step 4 - Choose your executors and meet your solicitor

An executor is a person you choose to carry out the terms of your Will, to ensure your wishes are fulfilled correctly. Most people choose their solicitor and/or trusted family members as executors.

## Step 5 - Keep it safe and up-to-date

Your Will is a very important document. Most people prefer to leave it in the care of their solicitor or legal advisor and keep their copy in a safe place, ensuring their executors know where to find it.

# Updating an existing Will

If you are updating an existing Will, you can choose to make a completely new Will or add a 'codicil' which would set out changes to your existing Will and be read alongside it. In both cases, we recommend you speak to your solicitor so they can advise you on the best option.

## Don't forget...

If you do decide to include Sobell House in your Will please remember to use our full name "Sobell House Hospice Charity" and "Registered Charity Number 1118646" or else your wishes may not be followed. Thank you.

If you have any more questions please contact the charity team - we'll be happy to help you.

 01865 857007

 [mail@sobellhospice.org](mailto:mail@sobellhospice.org)

In the meantime, please fill out the Intentions Form on page 12 and keep this booklet safe to refer back to.



## Your signature could do something amazing...

Leave a gift to Sobell House in your Will and leave your **mark** on the world.



## Write your Will for free today

We've partnered with expert Will writers, Guardian Angel, to offer you an exclusive opportunity to write, or update, a simple Will for free. You can do it online, over the phone or even in-person - whichever way suits you best.

If you want to take the headache of Will writing - this is the service for you:

- It's quick and easy - the average Guardian Angel Will takes 15-20 minutes.
- It's safe - Guardian Angel Wills are legally binding and checked by experts.
- It's free!
- You will have peace of mind that your affairs are in order.
- There is no obligation or pressure to include Sobell House Hospice in your Will, but if you can support us we would be so grateful.

To book an appointment please call the Guardian Angel team on **0800 773 4014** and quote our code **SOBELLHOUSEFREE**.

For more information, please scan here! →



## Show your support!



### Play the Local Hospice Lottery

Want a fun, easy, and affordable way to support Sobell House? Play the Local Hospice Lottery for £5 a month and you could be in with a chance of winning hundreds of cash prizes.

### Shop with us

We have ten shops across Oxfordshire, each packed full of new and previously-loved items in need of a new home. From furniture to bric-a-brac, clothes to books, there's something for everyone!

### Share your story

The real-life experiences and stories we share are so important. They show people that hospice care isn't scary, and help us to raise the much-needed funds that keep our services running. If you would be comfortable sharing your story, we would love to hear from you.

### Volunteer

Do you have any spare time that you'd like to fill with something worthwhile? Then volunteer for Sobell House! We have a wide variety of voluntary positions available.



**Find out more**  
[sobellhouse.org/get-involved](https://sobellhouse.org/get-involved)

# FAQs

## Do I need to make a Will?

Whilst having a properly prepared Will is not a legal requirement, it does make things much easier for your family or friends to sort everything out when you die. Your Will is the only way for you to decide what happens to your property, money and personal possessions after you die.

## Do I need a solicitor?

We strongly advise using one because a solicitor will make sure that your Will is watertight and viable. Another option we would recommend is to use an online Will writing service like Guardian Angel, who we have partnered with to be able to provide you with a free Will writing service.

## What is a free Will service?

We have partnered with Guardian Angel, an established and trusted free Will service making it quick and easy for our supporters and their partners to make or amend a simple Will. There is no obligation to leave a gift in your Will to Sobell House but we would be grateful for any support you are able to give.

## What happens if I die without a Will?

Dying without an up-to-date Will is known as 'intestacy'. If you die intestate, it is up to the law to decide how your estate is distributed, which might not reflect your wishes.

## What about Tax?

A gift to charity is taken out of your estate before your liability for inheritance tax is calculated. Some people see it as a useful way of bringing their estate under the inheritance tax threshold. Your solicitor can advise you about the current threshold.

## Do I need to tell Sobell House if I include them in my Will?

Your Will is private. It is your choice as to whether you choose to tell us that you have left a gift in your Will to support our work in caring for people with life-limiting illnesses. However, if you do let us know then we can do more to keep you up to date on what your gift could achieve.

## What if I change my mind?

You can always amend your Will whilst you are still alive through our free Will service or with your own solicitor.

# Intentions Form

**Thank you for thinking about leaving a gift in your Will to Sobell House. It is extremely helpful for us to know of your intentions, and will enable us to thank you and keep you informed about our work. Any information you provide will be treated in the strictest confidence and is not legally binding.**

- I have already remembered Sobell House Hospice Charity in my Will
- I intend to remember Sobell House Hospice Charity in my Will
- Please arrange for a member of the charity team to contact me regarding leaving a gift in my Will

Name \_\_\_\_\_ Address \_\_\_\_\_  
\_\_\_\_\_  
Postcode \_\_\_\_\_

Phone number \_\_\_\_\_ Email \_\_\_\_\_

We would love to keep in touch to tell you how your support is making a difference and about other ways you can help Sobell House, including opportunities to donate, volunteer or fundraise. We may contact you by post unless you tell us otherwise. Please let us know how you'd like us to keep in touch:

No contact by post please

By email Yes  No

By phone Yes  No

We promise to keep your details safe and only use them in accordance with our privacy policy: [sobellhouse.org/privacy](https://sobellhouse.org/privacy). If you'd like to change how we keep in touch at any point, please call 01865 857007 or email [mail@sobellhospice.org](mailto:mail@sobellhospice.org).



**Thank you**