



Oakhaven
hospice

A Guide to Leaving a Gift in your Will

Help us to ensure we are always here
for people when they need us most



Making every moment matter

www.oakhavenhospice.co.uk

Why leave a gift in your Will?

Oakhaven Hospice is a very special and unique place that offers care, comfort and support to many people every year within our New Forest, Waterside and Totton communities. I feel extremely privileged to be Chairman of the Board of Trustees.

It is because of the legacy of Phoebe and John Coates that Oakhaven exists at all.

The land on which the Hospice sits was once their home. It was gifted to the charity so that Oakhaven could be established and so that people at end of life would receive specialist care in a safe and comfortable environment. Without their vision and generosity we simply wouldn't be here.

To remember Oakhaven with a legacy is a gift in itself.

Oakhaven has now been providing free hospice care for local people and their loved ones for over 28 years; during that time gifts in Wills have played a significant role in allowing us to achieve this.

Legacies are vital to the services we provide both at the Hospice and out in the local community.

In fact, the care costs of one in every four people we support are funded by gifts in Wills.

Every legacy, however small, contributes to meeting our ongoing needs.

I hope you are reading this brochure because you are considering leaving a gift in your Will to Oakhaven.

We are extremely grateful for all gifts in Wills whatever their size. Your legacy will be helping us to make every moment matter for those who are facing end of life.

Please do read on to see how you can leave a gift in your Will and together we can continue to ensure that there will be the very best of hospice care available to those who need us.



with my sincere thanks,
Professor Paul Dodson

Jackie's Story

My husband arrived at Oakhaven Hospice after being in hospital for over 2 months, the immediate feeling of relief, safety, peace and care was quite overwhelming for both of us when we were welcomed.

For the first time in nearly 4 years of his 'fight' with cancer, I didn't have to be the person in charge any more, Oakhaven were looking after both of us from the moment we arrived.

John spent nearly 4 months at Oakhaven, being looked after by the kindest, most caring, and with the best sense of humour, team that anyone could ever meet.

Every time I visited there always seemed to be a nurse in his room, both of them having a chuckle at something, he did like to play pranks and joke with all the team.

No matter what time of day I needed a chat or reassurance, or sometimes just a hug, there was someone there for me.



The time we both spent together at Oakhaven felt like a haven and I will always cherish those months. I can never say thank you enough and will always support the Hospice as much as I can.

Graham's Story

I was diagnosed with a progressive autoimmune COPD condition in November 2015 and referred to Oakhaven in late 2018. I started visiting the Day Hospice in January 2019 when I discovered that my prognosis was six months. With the help of everyone I was able to deal with the shock of this and my new situation and to look forward at life.

Ever since this diagnosis I have had short and long term targets; visits from family and friends, a nephew's wedding and a great niece's birth. This helps me cope with the bad days and gives me something to keep going for.

Visiting the Hospice gives me something to look forward to – the companionship of other patients and the expertise of the staff, who are very adept at picking up when things aren't right physically or mentally. I always go home happier and in a better frame of mind.

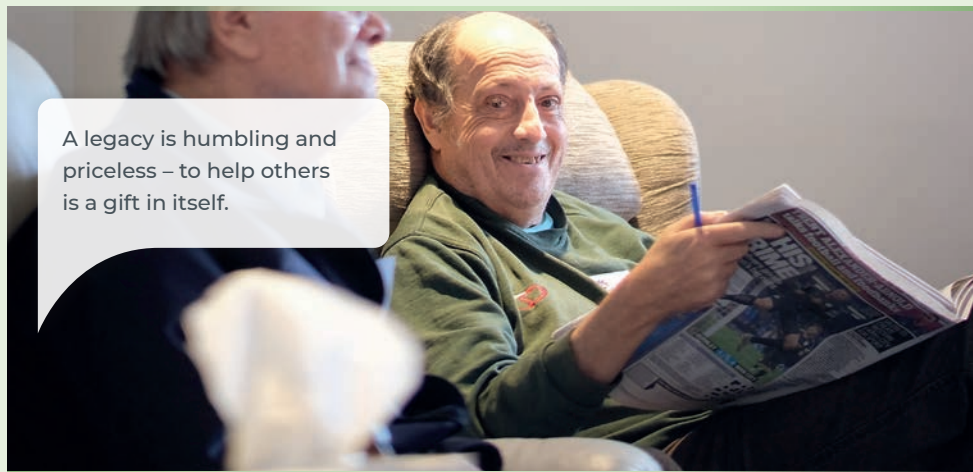
It is not just the clinical staff who help me, it is all the volunteers, drivers, kitchen staff and the Wellbeing Centre helpers who I cannot praise enough for their care and assistance.

I am not able to thank Oakhaven enough for all they do. They have certainly raised the quality of my life and I believe this has extended my life by many months and hopefully more to come.

The Hospice gives a variety to my life and I always look forward to my Day Hospice visits. Oakhaven Hospice is an incredibly important charity.

Oakhaven has really helped me, everyone is so kind and can't do enough for you.

A legacy is humbling and priceless – to help others is a gift in itself.



Legacies help in many ways

We are so very grateful for all gifts in Wills, whatever their size. Each legacy will allow Oakhaven to make a real difference to the lives of the people we support. Any gift, whether large or small, will make a difference.

The care costs of 1 in every 4 people we support are funded by gifts in Wills. Remembering us in your Will means we can get closer to our goal of making sure every person has the care and support they need when diagnosed with a life-limiting illness.

Your gift will help us provide specialist end of life care.

We provide end of life care to over 250 patients and loved ones in our New Forest, Waterside and Totton communities at any one point in time.

Meeting the physical, emotional and spiritual needs of those in our care will always be our first priority. Your gift could pay for specialist staff who are dedicated to helping patients manage their symptoms.

Your gift will help make every moment matter for more people.

We want to ensure as many patients as possible can access our services. With a holistic approach Oakhaven not only provides traditional support, but social interaction, physiotherapy, complementary therapy, as well as counselling and bereavement services.

£27,300

Mrs M left us a gift in her Will of £27,300

This is how we used that to support our patients in Oakhaven and the local people in our community:

£1,890

paid for 9 visits of an Oakhaven Community Nurse.

£14,760

covered the cost of 5 days of care on our In-Patient Unit.

£3,600

allowed 30 patients to enjoy a day in our Day Hospice.

£7,050

covered the cost of our Counselling and Chaplaincy team for a whole month.

My wife's happy memories and love live on – enriched by the knowledge that her legacy continues to support the essential work of Oakhaven.

Thank You



Rose Walford
Clinical Nurse Specialist
Community Team

At Oakhaven Hospice I work as a Clinical Nurse Specialist in the community team. We are privileged to be able to work with patients in their own homes to deliver specialist symptom control for those with a life-limiting illness and for end of life care. We are so proud to be able to make a difference for our patients, offering a presence at a time when our patients are feeling anxious, listening to their priorities, providing emotional support and expert knowledge in symptom control. We are committed to holistic care and listening to what really matters to our patients. Without the support of Oakhaven Hospice our patients would struggle to continue to be cared for in their own homes, and this is something we are passionate about delivering. Thank you for your continued support in making this possible.

**Please don't think a gift in your Will
has to be large to make a difference.**

Things to consider when planning your Will

Anyone who has experienced a life change, such as buying property, getting married or having children, should consider writing or updating their Will.

Making a Will is the only way you can be sure that your wishes are followed after your death. When writing your Will it is important that you get the help of a solicitor to avoid errors which could invalidate your Will.

If you have already made a Will, it is easy to add a codicil (an extra section) to explain that you would like to make an additional gift. If you plan on including a gift to Oakhaven Hospice, you'll find

the information you need to take to your solicitor on the following pages. Your solicitor will also be able to advise you about the inheritance tax savings you could make as a result of your gift.

If you would like to talk about how your gifts will help Oakhaven Hospice please call the Hospice on **01590 677773** and speak to a member of the legacy team. You can also find out more by visiting www.oakhavenhospice.co.uk/legacy.



When considering writing a Will always speak to a solicitor first.



We receive a small percentage of funding from the NHS towards our annual running costs. Gifts left to us in Wills cover the cost of care for one in four of our patients.



Different ways in which you can leave a gift in your Will

We understand that there are many things to think about when deciding to leave a gift in your Will to Oakhaven.

You may feel that once you have made provision for those you love, there will be nothing left of value. No matter how big or small your gift may be, it will support our work and your wish to care for those at the end of their lives.

Should you decide to help and support Oakhaven, it all adds up to a very special and compassionate way of showing how much you value our services and want to support those in our community.

The three types of gift that you may wish to consider leaving Oakhaven are:



Residuary Gift

This refers to a percentage of your estate once all your debts and all other gifts have been paid. This way of giving ensures that those you care about are catered for first and the remainder can be left to causes that are important to you.



Pecuniary Gift

This is a specific amount of money, e.g. £1,000. Do note that over the years a fixed sum can decrease in value as the cost of living increases.



Specific Item

You may have a specific item of value that you would like to leave as a gift, for example jewellery or a painting. Items such as this would be sold at the best possible price and the funds raised will go towards running our services.

Details you will need for your Will

To ensure your gift reaches the Hospice without any difficulty your solicitor will need the following details:

Our correct legal name: The Oakhaven Trust

Our main address: Lower Pennington Lane • Lymington • Hampshire • SO41 8ZZ

Our registered charity number: 900215

Mark's Story

I am a Day Hospice patient and when asked to describe what Oakhaven means to me, my first thoughts were, "How long have you got for me to list everything I like about it?" To be honest, the list is endless.

The clue is in the name 'Haven' and that's what it is for me; a haven to meet other outpatients, have lunch, a good natter, a cup of tea and a naughty piece of cake, but more importantly, to hear the laughter. For a few hours people forget about what they're going through and dealing with and can simply be present in the moment.

It's never a dull place and all the staff and volunteers are truly dedicated and professional, they also genuinely care about you. Without the ongoing support of Oakhaven, life for me would be very dull indeed. I am lucky to have them as part of my life and I am eternally grateful for everything they've done for me.

As a friend from Oakhaven once said to me 'I didn't come to Oakhaven to die, I came here to live.'

Thank you Oakhaven staff and volunteers alike, you simply are the best.



We're here to help

If you would like to talk about how your gifts will help Oakhaven Hospice, please get in touch with us in confidence on 01590 677773 or email legacy@oakhavenhospice.co.uk.

You can also find more by visiting www.oakhavenhospice.co.uk/legacy

Inheritance tax and how everybody can win

Leaving a gift in your Will can be a very tax efficient way of giving to charity and supporting your community. A gift to charity can reduce, and in some situations, eliminate your inheritance tax liability.

If you leave something to charity in your Will, then it won't count towards the total taxable value of your estate. This is called leaving a 'charitable legacy'.

Inheritance tax

This is a tax on the estate (the property, money and possessions) of someone who has died.

Current legislation states that your beneficiaries will not have to pay any inheritance tax if the estate you leave is less than £325,000. If the estate is valued at over £325,000 anything over this amount is liable to inheritance tax of 40%.

From 2020/21, each individual can claim an additional allowance of £175,000 to offset the sale of a family home on death, on top of their existing £325,000 inheritance tax exemption.

Leaving a gift in your Will to Oakhaven Hospice can help to limit the amount of inheritance tax your beneficiaries may have to pay. The estate pays inheritance tax at a reduced rate of 36% instead of 40% on some assets if you leave 10% or more of the 'net value' of your estate to a charity in your Will.

For example



If your net estate was worth £100,000 after your full inheritance tax allowance had been applied, your estate would have to pay £40,000 of inheritance tax at 40% tax.

If you were to leave 10% of this to charity, then the tax due on your estate would reduce to £32,400.

This would be a tax saving of £7,600 to your estate; the difference in tax due between £40,000 and the reduced rate of £32,400.

This would mean that you would have left a gift of £10,000 to a charity of your choice helping them in making a real difference to the community. The cost to your estate would only have been £2,400.

The rules on how to work out what you can give away to charity to secure the lower tax rate aren't always as straightforward as our simple illustration above and are liable to change. We recommend that you always take independent legal advice before leaving gifts in your Will.

*All information correct at the time of print.

Oakhaven Hospice supports people in our New Forest, Waterside and Totton communities who are facing end of life

Support is provided through our team of community Clinical Nurse Specialists, In-Patient Unit, Day Hospice, Wellbeing Services, Physiotherapy, Complementary Therapy and our Family Support and Bereavement Service to manage people's physical, emotional and spiritual needs.

**With your support and a gift in your Will we really can make
every moment matter for those who need us most.**



Oakhaven Hospice • Lower Pennington Lane • Lymington • Hampshire • SO41 8ZZ

01590 677773

legacy@oakhavenhospice.co.uk www.oakhavenhospice.co.uk



@oakhavenhospice



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Registered Charity Number 900215 (England & Wales)

