

Your 5 Step Guide to Will Aid



Antonio Olmos / ActionAid

This booklet contains 5 simple but important steps to ensure you have a smooth running and successful campaign

Will Aid - this November

ALL MONEY RAISED BY WILL AID SUPPORTS THE WORK OF:

ACTIONAID | AGE UK | BRITISH RED CROSS
CHRISTIANAID | NSPCC | SAVE THE CHILDREN UK
SCIAF | SIGHTSAVERS INTERNATIONAL | TROCAIRE



Thank you for registering with Will Aid.

Thank you for registering with Will Aid. You're already on your way to raising money to help transform the lives of vulnerable people around the world.

What is Will Aid?

Will Aid is an annual fundraising campaign run by nine of the UK's leading charities.

The campaign aims to encourage more people to make a Will with a solicitor and, at the same time, to raise vital funds for the participating charities.

The Will Aid charities work all over the world helping people with life's essentials like clean drinking water, food and health care. The generosity of participating solicitors helps people to live, build their communities and improve their future.

How does the scheme work?

We publicise Will Aid extensively in local, regional and national media. Participating solicitors usually promote the scheme to their clients and people in their locality and the Will Aid charities promote the scheme to their supporters. The public find the idea of making a donation to help the Will Aid charities rather than paying a fee very motivating. They may have put off writing a Will for many years but decide to take action when they hear about Will Aid.

From August onwards, prospective will-makers will be able to find details of convenient participating solicitors by using the Find a Solicitor function on the Will Aid website or by contacting the Will Aid hotline. They can then book their appointment directly with the participating solicitor.

Participating solicitors draw up a basic Will free of charge in November. In return for this service, the solicitors ask the will-maker to make a donation to reflect the level of work and expertise involved. We hope this will be similar to the fee you would normally charge.

We suggest a donation level of £75 for a single Will, £110 for mirror Wills and £40 for a codicil.

Will Aid clients can also have their Wills registered free of charge with Certainty, the National Wills Register.

Important information

You are free to spread the work beyond the official Will Aid month if that suits your business. You can also limit the number of Wills you write under the scheme by letting the Will Aid office know when you have reached your limit.

The scheme covers the drafting of a **basic Will** or a pair of Wills. Generally speaking, this is where the client is leaving their estate to a limited number of people and the estate value does not require complicated tax advice. Additional work would be subject to your normal fees and should be charged separately. Any such fees should be explained and agreed with the prospective will-maker at the initial meeting.

If you or your clients would like any further information about Will Aid or making a Will, our website at www.willaid.org.uk is packed with useful information.

Calendar

The following checklist will help you to prepare for the campaign and the 5 Step Guide on the following pages provides all the information you need to participate successfully.

	Calendar	Don't Forget
August	Contact details of participating solicitors will be available on our website and telephone hotline. Members of the public start making appointments.	<ul style="list-style-type: none"> • Please let us know immediately if your contact details in the covering letter with this pack are incorrect. • Let colleagues and your receptionist know you are participating so that they are prepared to welcome Will Aid clients.
September	We contact local papers, radio and TV stations; leaflets will be sent to charity supporters, libraries and advice centres to generate the maximum publicity for the scheme. Your details will be included in the local press coverage and you may receive enquiries.	<ul style="list-style-type: none"> • Let us know if you are willing to act as a press spokesperson. This will generate more positive publicity for your firm. • Set up a link to the Will Aid website. Go to the publicity section of the website for instructions. • Put up your posters and if possible please include Will Aid leaflets in your mailings to clients.
October	We expect a good deal of publicity in national newspapers and magazines. This will create a high volume of enquiries from will-makers wishing to make appointments this November.	<ul style="list-style-type: none"> • Display your publicity materials. • Please contact your local papers to tell them you are taking part in the scheme. You will find advice on publicity on the website.
November	This is the specified Will-making month. You are welcome to accept appointments before or after November if it suits you better.	<ul style="list-style-type: none"> • Once you have arranged all the appointments you can accommodate, let us know immediately so that we can direct will-makers to an alternative solicitor.
December on	The Will Aid office will be banking donations and distributing the funds raised to the participating charities. Please send in your donations as quickly as possible.	<ul style="list-style-type: none"> • Please remember to send the receipt form with the donation – to enable us to claim the Gift Aid on the donation increasing the value by 28p in every £1. • Let us know if you need any additional address labels or receipt books.

Best of luck with the campaign!



Sightsavers / Toby Adamson

1. Spread the Word

Publicity makes all the difference to the success of Will Aid. Although we will do all we can centrally, your help really will make a difference. **Please help us make a big noise in your area by participating in our publicity drive.**

Make sure local people know about your involvement with Will Aid.



- **Display the enclosed posters and leaflets in your office** – and include a leaflet with any appropriate mailing to clients.
- **Find other outlets for display materials** – churches, post offices, estate agents, Independent Financial Advisors, or other business places in your area may be willing to help. If so, let us know and we will send leaflets or posters suitable for them.
- **Local newspapers and radio** are naturally very interested in stories involving local people. The more you can do locally, the more successful the campaign will be for your business. If you are willing to be interviewed by local radio, please let us know.
- **If your firm advertises locally** why not include a reference to Will Aid in your advertisement? The Will Aid website provides some suggested wording for press releases and adverts. You can also download the Will Aid logo.
- **Check out the Will Aid website** for ideas on how to publicise your firm's participation in the scheme.

Our media team will be spreading news and stories about Will Aid across the local, national and regional media. If you could help, please call the press office on 01460 271182.



© Help the Aged

2. Receiving Enquiries

We will give your contact details to people who call the Will Aid hotline or log on to the Will Aid website looking for a local participating firm. We will also be sending out press releases including your contact details to your local papers. Members of the public will be invited to contact you directly to make an appointment, either by telephone or email.

- **Don't forget to brief your receptionist and colleagues** in plenty of time as enquiries may be received from August onwards. You may find the enclosed briefing sheet useful to update colleagues.
- **You are free to arrange appointments to suit you.** You are very welcome to spread them before or after November.
- We can't predict exactly how many people will contact you, **but if you receive more enquiries than you can handle, let us know at the Campaign Office as soon as possible.** We will provide callers with details of an alternative firm. **Please ask callers who you cannot accommodate with an appointment to contact the Will Aid office** so that we can find them an alternative solicitor.
- If you send an introductory letter to your client prior to their appointment, please include the leaflet "Making Your Will with Will Aid". This leaflet reminds clients of the suggested minimum donation (£75 for a single Will, £110 for a pair of mirror Wills and £40 for a codicil) and stresses that you are giving your time without charge to raise funds for the Will Aid charities. There is no VAT applicable on a charity donation.





3. Meeting the Client

We have encouraged clients to use the will planner provided to prepare for their appointment. This should help to save your time.

- If a client has complicated requirements, you are free to charge separately for the additional work involved. However, we would stress the importance of making it clear to the client before accepting their instructions that you will only carry out part of the work under the Will Aid scheme and will charge them your normal fee for the additional work.
- Although you are giving your time free of charge your new clients understand that they will receive the same high quality service that all your paying clients receive and that you will prepare their Will to the same high standard.
- **Please ask your clients to consider making a charitable legacy.** Legacies are a vital source of income for all charities. Clients can choose to make a legacy to any charity when making their Will with Will Aid.



Legacies can transform the lives of the poor and vulnerable

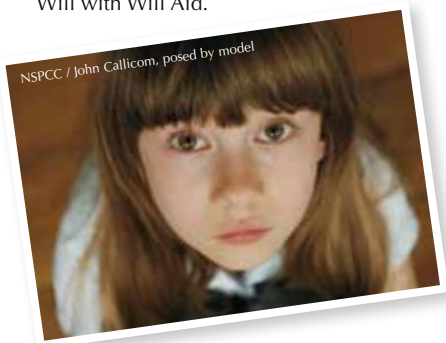
A bequest to one or more of the Will Aid charities would be greatly appreciated – please remind your clients of this opportunity to make a lasting gift.

A legacy of £600 could provide an electric wheelchair enabling an older person to stay mobile.

A legacy of £1,000 could provide 50 street children in India with food and an education for a whole year.

A legacy of £5,000 could provide 2 years of fuel for a Red Cross Field Hospital generator, enabling life saving surgery in war zones.

A legacy of £10,000 could train 2 cataract surgeons to restore sight.





Cecilia Goin / IFRC

4. Accepting the Donation

- Please remind your clients that the suggested donation is **£75 for a single Will, £110 for a pair of Wills and £40 for a codicil**. If this differs widely from your usual charges, you are welcome to indicate your usual rate to the client.
- Cheques should be made payable to Will Aid.
- Enclosed with this pack is a receipt book. Please complete the receipt and give them the **yellow** copy. The **blue** copy is for your records and the **white** top copy should be forwarded to the Will Aid office with the client's cheque.
- Will makers have the option of making their donation by **debit/credit card on the Will Aid website**. If they choose this method, the will maker should show you their payment acknowledgement. So that we can include all the donations you have raised on your end of campaign Certificate, please complete the Will Aid receipt form with the will makers details and mark it 'Donated online'.
- The receipt form includes a section to indicate whether the **will maker has made a legacy to a Will Aid charity**. This information is extremely valuable to the charities for future planning and will be kept completely confidential.
- When accepting the donation, please make your client aware of the importance of **Gift Aid**.
- Please encourage your clients to indicate on the receipt form how they heard about Will Aid. This will help us greatly with planning in future years.
- Will Aid donations are not subject to VAT.

Gift Aid

Gift Aid is a valuable way of increasing the value of the donation at no extra cost to the Will Maker and we ask that you encourage your clients to complete the Gift Aid declaration on the receipt form. As long as your client pays UK income tax, either on their salary or savings, we can claim 28p in every £1 donated so a gift of £75 is worth £96 to Will Aid.

Don't forget that **Gift Aid declarations must be completed by the individual who makes the donation** (i.e. signed the cheque). If you have a pair of will-making clients who are not making their donation from a joint account, please ask that they each complete a separate declaration for the amount of their donation.



Liba Taylor / ActionAid

5. Send Donations to Will Aid

- **Please send the donation to Will Aid as soon as you receive it** with the white copy of the receipt form. The sooner we receive your donation, the quicker the money can be used to improve lives.
- Simply stick one of the Will Aid freepost address labels onto an envelope, and post it. Should your sheets of labels go astray, the address to send donations to is: **Will Aid, SWB11047, Crewkerne, Somerset, TA18 7ZB**
- **Please do not send cash.** If your client pays in cash, we would appreciate it if you would keep the cash and send us a company cheque to the same value.
- To save money on administration, **if you require a receipt for the money you have sent in, please give us your email address.** It is more cost effective to contact you by email. If you do not have an email address, let us know your fax number.
- At the end of the campaign we will send you a newsletter reporting on the results, together with a **certificate confirming how much your firm has raised.** You may like to display this in your offices.

If you require any additional receipt books or other materials just let us know. Alternatively, materials can be downloaded or ordered via our website.

Thank you so much for your generous support of the Will Aid campaign. We couldn't do it without you.

How your Will Aid donations could change lives

- £40** could provide water purification tablets for 26 families
- £95** could pay for an oxen for a refugee family in Uganda to help them grow food and rebuild their lives
- £110** could pay for six children with cataracts to have the operation to restore their sight
- £200** could pay for two older people to feel safer when their homes are made more secure
- £1000** could pay for a year's salary for a midwifery teacher to train more midwives to save mothers' lives
- £5000** could re-build 2 schools destroyed by war in Angola

For more information about the work of the Will Aid charities visit www.willaid.org.uk

Solicitor Help Line: 01460 271178

Email: enquiries@willaid.org.uk

Website: www.willaid.org.uk

Address: Will Aid, Freepost SWB11047,
Crewkerne, Somerset, TA18 7ZB



All money raised by Will Aid supports the work of:
Action Aid (Reg No 274467) 01460 23800
Age UK (Reg No 1128267) 020 7239 1965
British Red Cross (Reg No 220949/SC037738) 020 7877 7156
Christian Aid (Reg No 1105851) 0161 408 3325

NSPCC (Reg No 216401 & SC037717)
Save the Children UK (Reg No 213890)
SCIAF (Scotland) (Reg No SC012302)
Sightsavers (Reg No 207544/SC038110)
Trocaire (N. Ireland) (Reg No XR 10431)

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