



**Meet.
Move.
Learn.**



Pass on a gift of happiness

A gift to Open Age in
your Will helps older people
stay active, stay curious
and stay connected.

www.OpenAge.org.uk

A gift in your Will can change lives

Your kindness can help to bring older people together to learn skills, build confidence, and find joy. You may have experienced this yourself or have seen a loved one flourish with Open Age.

Mohammed, an 81 year old Open Age member, explains this well: "three words I want to use to describe what Open Age has given me: dignity, respect and self-confidence. I go to Open Age classes and learn many new things, and then when I'm out in the world I have a wonderful feeling because now I feel included".

As a charity, we make every penny count, but we know there is so much more we can do, and so many more people who really need our support to keep their independence and health in their older years. It would be fantastic if your gift could be a part of making that happen.

This guide gives information on how to leave a gift in your Will to Open Age. If you want to know more or just want to have a chat with our friendly staff about how your gift could make a difference, please do use the contact details at the back of this leaflet.



Emma Foulds, Chief Executive of Open Age

The difference your support makes

63% of
Open Age members
live alone.

In one of the loneliest cities in the UK for older people, Open Age is helping thousands turn later life into a time of joy, purpose and connection.



// I do so much at Open Age, I couldn't afford to do those things at a commercial rate. It's really made a difference too: with Open Age, I feel like I am really a part of a community. it gives me something to get out bed that I enjoy and look forward to."

Miss P, Open Age member

From effective exercise classes to creative workshops to trips and events, our programmes are uniquely designed for older people. And for those who can't leave their homes, we bring connection to them, with online classes and phone groups, making sure everyone is included.

Our approach is rooted in community. We help people stay active, independent, and connected in their own neighbourhoods, where they feel safe, seen and supported. And it works: 79% of our members say they've made new friends through Open Age and 77% say their wellbeing has improved.

By leaving a gift in your Will to Open Age, you'll be helping ensure that joy, purpose and community are within reach for older people, and that can be life changing!

Three simple steps...

1 Find a Will writing service

Although you can find simple Will writing packs in stationers, we recommend you speak with a solicitor or a professional Will writing service to make sure your Will is clear and legally valid, giving you peace of mind.

You could ask friends or family for a recommendation or contact the Law Society to find a local solicitor on **020 7320 5650**.

Alternatively, Open Age has partnered with experts, Octopus Legacy, so you can write or update a simple Will for free or get a more complex Will at a discounted price.

If you would like to find out more about Octopus Legacy, contact them directly on **020 4525 3605**, email hello@octopuslegacy.com or visit their website at www.octopuslegacy.com. Please quote "Open Age".

While many people using this service choose to include a gift in their Will, there is no obligation to do so.



// It has been a great pleasure to be an Open Age member for so long. I have built some great friendships and I am still here making more friends. Open Age ranked very high on my list of charities, and I wanted to support you, so I decided to leave you a gift in my legacy as you have been a huge part of my life and still are." **Ann Britch-Barney, Open Age Member**



2 Choose the type of gift

There are three main types of gift that can be left in a Will:

- **residuary:** a share of your estate, the value of which is calculated after all other gifts and expenses have been paid. This is the most common type of gift left to charities. It enables you to take care of all your other beneficiaries and financial responsibilities first.
- **specific:** an object or property
- **pecuniary:** a fixed amount of money

A solicitor or professional Will writer can guide you through these options.



It's important to give our correct details to your solicitor or Will writer when including a gift to Open Age. They will need our registered charity number and address as follows:

- Open Age is registered as a charity in England and Wales (No: 1160125).
- Our address is:
Open Age, St Charles
Centre for Health and
Wellbeing, Exmoor Street,
London, W10 6DZ

3 Appoint Your Executor(s)

Your executor will be responsible for carrying out the instructions in your Will. You can appoint more than one.

An executor can be any person you know and trust. They might be a friend, relative or your solicitor. Octopus Legacy can support a friend or family member to carry out this role if you choose.

// I really appreciate having this lovely service so close to my home. It helps keep me from feeling isolated and gives me things to look forward to."

Open Age member



// I was always attending Open Age classes and activities when I was able to. I still feel very connected to the community and decided to leave them a gift in my will because I appreciate the support they gave me when I was struggling with my health." Mr P, Open Age Member



Questions and answers

These are some of the things we get asked about most
If you have any other questions, please get in touch.

Q Do I have to be wealthy to leave a gift in my Will?

A Absolutely not! Gifts of every size are very welcome, celebrated and will be spent with care and consideration.

Q Can I still look after my family and friends first?

A Yes, most people choose to leave a gift only after they've taken care of those closest to them. You may wish to discuss your thoughts of leaving a gift to Open Age with friends and family.

Q What wording should I use to leave a gift to Open Age in my Will?

A We recommend you seek the advice of a solicitor or professional Will writer regarding the best way to word your Will. However, you may find this wording helpful: "I leave a ____% share/£____ of my residuary estate to Open Age,

for its general charitable purposes and I declare that the receipt of the treasurer or other proper officer for the time being shall be a sufficient discharge to my executors". Many people choose to give a percentage as it keeps pace with inflation.

Q I've already written my Will. Do I have to rewrite it if I want to leave Open Age a gift?

A No, you can instruct a solicitor to add a short amendment, called a codicil, to your existing Will. However, it's a good idea to regularly review your Will, so that it's up to date and still reflects your wishes and circumstances.

Q How much of my gift to Open Age will go to supporting older people?

A All of your gift will go help Open Age support older people to live happier, healthier, more connected lives.

Share your intentions

We would love for you to tell us if you plan to leave a gift in your Will to Open Age, so we can thank you and let you know about the difference your kind donation will make. That is completely optional and you can still change your mind about your gift at any time with or without letting Open Age know.

Which of these best describes your situation?

- ☐ I've already included a gift to Open Age in my Will
- ☐ I will leave a gift to Open Age when I write or update my Will
- ☐ I'm considering leaving a gift to Open Age in my Will
- ☐ I would like to know more, please contact me
- ☐ Other: _____

If you'd like to talk about leaving a gift to Open Age in your Will, please get in touch with Lorna Schofield, Open Age's Fundraising Manager, using the contact details below. She would particularly enjoy hearing about what Open Age means to you.

Your contact details

Title:		First name/s:	
Surname:			
Address:			
	Postcode:		
Email:		Tel:	

 Please send this form to: Lorna Schofield, Open Age, St Charles Centre for Health & Wellbeing, Exmoor Street, London, W10 6DZ.

 Alternatively, email this information to fundraising@openage.org.uk

 You can also hand the completed form in at your local Open Age centre.

 Phone Open Age on 020 4516 9978.