

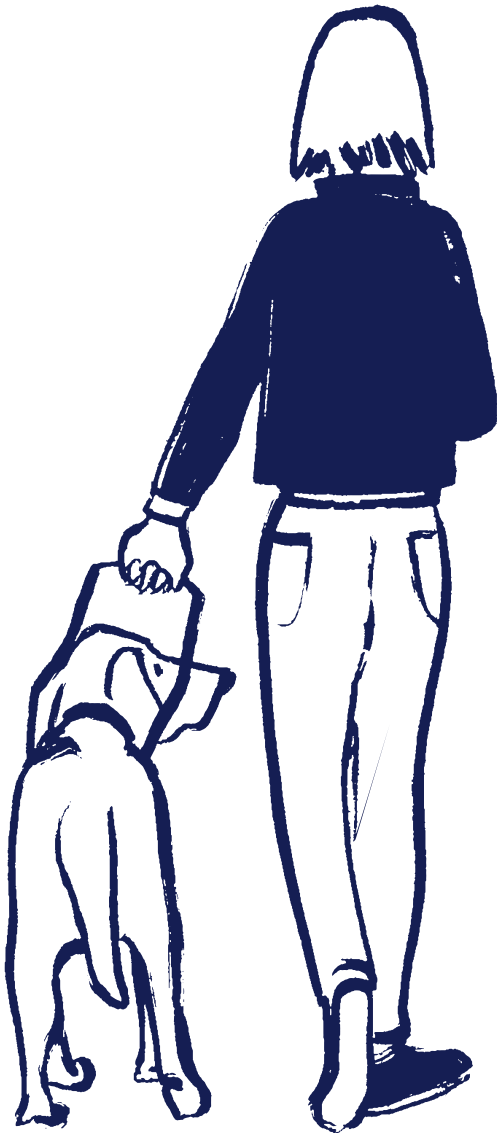


Your handy guide to

Gifts in Wills

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“

I wasn't surprised that Mum left a gift in her Will to Guide Dogs. She'd loved dogs all her life and it was just the kind of caring and thoughtful thing she would do, help someone in need with the life-changing gift of a guide dog. As Mums always know best, I've decided to follow her example and I've left a gift in my Will to Guide Dogs too.

Janice, Guide Dogs supporter and Pledger

”

Thank You

Every single one of us at Guide Dogs, from you, our dedicated Volunteers, our inspiring service users and our hard-working staff help raise awareness about the importance of gifts in Wills to Guide Dogs.

As a Volunteer for Guide Dogs, we know how hard you work every single day. You reach so many people in your local communities through the fantastic work you do.

Whatever your role, you are the visible presence of Guide Dogs in your local area which is why we need your help! As a Volunteer, you are in the ideal position to raise awareness about the importance of gifts in Wills to Guide Dogs!

Legacies or gifts in Wills are so important to Guide Dogs, after all **nearly two out of three of our wonderful guide dogs are thanks to gifts in Wills.**





A life-changing gift

A gift in a Will to Guide Dogs is truly life changing. This one act of kindness and generosity helps Guide Dogs achieve some wonderful things. Every gift in every Will, large or small, makes a real difference, as the stories we share below demonstrate:

Guide dog owner, Craig, talks about his beloved guide dog, Commando:

“

Not a day goes by when Commando doesn't do something to make me smile. I often refer to him as sunshine, which in many ways is what he is - having brought light, warmth and joy back into my life.”

It's inspiring to think that not only does a gift in a Will provide the guide dogs of the future, but it also allows us to expand our reach even further, helping support children with sight loss like Nell.

You'll have seen Nell on our TV advert in 2020. Just starting primary school, Nell is thriving. She's confident, determined and full of hopes for the future. As Rachel, Nell's mum says:

“

Because Guide Dogs was there early for Nell, she's got a really positive relationship with her cane. And we've always encouraged her to do things for herself and speak for herself.”



Our other services

My Sighted Guide and Buddy Dogs

A gift in a Will can also support a My Sighted Guide partnership, like Evi and Norma. As Norma says, “I’d recommend the scheme to anyone with sight loss – it gives you a real confidence and feeling of independence.”

Not forgetting our inspirational buddy dogs too. Tabita talks about the difference buddy dog, Dan has made to her son, Logan’s life:

“Everything has been amazing since Dan came along. We’ve been on family holidays together, instead of staying at home, and we’re always trying new things, like tobogganing or ice-skating. All I wanted was for Logan to have fun and enjoy life, and – thanks to Dan – that’s exactly what we’re doing now.”

A gift in a Will helps ensure thousands more children, young people and adults with sight loss lead confident, independent and fulfilling lives.

But we can only let people know about the vital importance of gifts in Wills to Guide Dogs with YOUR help.



Your Handy Guide

Which is why we've updated your handy guide, with key messages, tips, hints and useful information all about gifts in Wills and Guide Dogs.

The subject may seem a bit daunting, but we hope this will give you all the resources you need to keep spreading the word about gifts in Wills.

Don't forget, your local Legacy Engagement Officer (LEO) is always on hand to help (see the back page for the contact details of your local LEO or ask your local Community Team to put you in touch). Or contact us via our email address: LEOS@guidedogs.org.uk



Raising awareness

So, you may be asking, what can I do? All it takes to raise awareness is to mention our key legacy messages, if it's appropriate, of course. Here's one example. If you are out and about volunteering or fundraising and start talking to a member of the public and they ask how Guide Dogs is funded, you could say:

"A gift in your Will helps provide the guide dogs of the future".

Or

"Nearly 2 out of 3 guide dogs are only here thanks to gifts in Wills."

Or you could say

"We make a lifetime promise to provide every guide dog owner with a dog for as long as they need one, and this is only possible thanks to people who leave a gift in their Will to Guide Dogs".

And if you are a Guide Dogs speaker, you can always include these key messages as part of your talk.

Later on, we'll talk in a little more detail about other ways you can raise awareness about the importance of gifts in Wills to Guide Dogs in your local area.

But just weaving these key messages into every day conversations makes a huge difference and as we all know, you never know where that casual conversation will lead!

Saying Thank You

“

I know my aunt supported a number of charities with a gift in her Will. She loved dogs, so Guide Dogs was one of 'her' charities. She used to meet one of your Puppy Walkers at her local golf club and she loved finding out how the puppy was getting on”.

Jennifer, Next of Kin, Guide Dogs Legator

If you are a Volunteer for Guide Dogs, you will have already inspired someone to leave a gift in a Will to Guide Dogs, without even knowing it.

But for Guide Dogs as a charity, if we **DO** know who is planning to leave us a gift in their Will, we can do a very simple but important thing. We can say a heartfelt thank you to that supporter in their lifetime. And, when the time comes, we can talk sincerely and confidently to their family and friends about their loved one's support for Guide Dogs.

Which leads us to the importance of legacy referrals and how you can help.



A legacy referral

A legacy referral is when someone asks you for information about gifts in Wills or tells you that they've already left a gift in their Will to Guide Dogs.

More than anything, a legacy referral will demonstrate that a gift in a Will has been left to Guide Dogs because of your success in engaging people in your community and inspiring them to support Guide Dogs.

If a supporter or member of the public asks you for information about gifts in Wills or tells you that they've already left a gift in their Will to Guide Dogs, with their permission, pass their contact details on to your local LEO. The LEO will follow up with the enquirer, providing any information necessary. In the fullness of time, if you belong to a Fundraising Group, your Group will receive a soft credit as we wouldn't know about this person's gift without your help. It's important to capture the enquirer's information to ensure that this credit is given.

Your Group may not have many referrals each year, but each one is vital and means we can say thank you to supporters who make this kind decision and keep in touch with them appropriately.

“

I'd always steered away from talking about legacies or gifts in Wills in my talks, I was worried that the subject might sound depressing or I'd get asked a technical question that I wouldn't have a clue how to answer! But just mentioning that nearly two out of three of our guide dogs are thanks to gifts in Wills is an easy and straightforward thing to do. And I've discovered that audience members just want to know how they can help, how they can really make a difference. And a gift in a Will to Guide Dogs can make that life-changing difference to someone living with sight loss.

Lindsey Rowlands and guide dog Leyland, Guide Dog Owner, Speaker and Volunteer

”



A fundraising group's story

The Barnsley Fundraising Group received a credit for a gift in a Will after group members, Edgar and Joan Stewart, met a local supporter regularly through church. She was very interested in their volunteering work and often asked about their roles as puppy walkers and fundraisers. She also enjoyed meeting the guide dog puppies.

When the supporter passed away, Guide Dogs was one of the charities she chose to remember with a gift in her Will. The close connection with the work of the Barnsley Fundraising Group had inspired her to remember Guide Dogs in this very special way.

In the same way, your volunteering work in your local area will be inspiring others to make the same amazing decision - to leave a gift in a Will to Guide Dogs.



Other ways to raise awareness

As well as talking to supporters, you can also bring the gifts in Wills 'take one' leaflets to all your fundraising events and place them around your local community. Solicitors' offices, libraries, community centres and church halls are ideal places.

If you are a member of or affiliated to a Fundraising Group, don't forget to write your Group name in the 'Can you let us know where you picked up this leaflet' section. This way, once the leaflet is returned to Guide Dogs, your Group gets the referral.

Or, add your Fundraising Group number at the bottom of the Helping Guide Dogs leaflets. If someone requests more information on gifts in Wills and your code is on the leaflet, you'll receive the referral.

And if you are manning a fundraising stall, bring some of our 'Free Wills Network' and 'Bequeathed' leaflets with you.



Free Wills Network: Guide Dogs offers supporters, staff and volunteers the opportunity to have a simple Will written or updated for free by a local participating solicitor via the Free Wills Network. Whilst there's no obligation to include a gift to Guide Dogs in their Will, people taking part very often do so.

Bequeathed: As some people prefer to write a Will from the comfort of your own home, Guide Dogs has teamed up with Bequeathed, a free online Will writing service.

For more information or to obtain leaflets about Free Wills Network or Bequeathed, please contact your local LEO or visit our website.

Lots more information about Guide Dogs and gifts in Wills, including wording for a Will and advice for lay executors can be found on the Guide Dogs website. Please visit www.guidedogs.org.uk/giftsinwills



The family: Next of kin

As we've seen, the chance to say thank you to a supporter during their lifetime, for the great kindness of leaving a gift in their Will to Guide Dogs means a great deal. Equally important, when the time comes, is the chance to thank their family or Next of Kin for this amazing gift, to have a better understanding of why their loved one supported Guide Dogs and acknowledge that commitment fully to the family.

To do this, we always offer the family a chance to come and visit us at one of our centres, so they can see at first-hand just how much difference their loved one's support has made. Over the years we've learned that Next of Kin have found great comfort in knowing that their loved one's support wasn't taken for granted, that it had been acknowledged and appreciated by everyone at Guide Dogs.

That's why legacy referrals matter – it gives us a chance to say a heartfelt thank you to the supporter for their gift. And when the time comes, it also allows us to talk to their family with confidence about why their loved one chose to support Guide Dogs in this very special way.



Here's some Frequently asked questions about Guide Dogs and gifts in Wills

Q. I've been asked about gifts in Wills - what do I do?

If a supporter would like more information, ask for their name and contact number and get in touch with your local LEO, who will then contact the supporter. Or use our dedicated email address – LEOS@guidedogs.org.uk The LEO will be able to answer any specific queries the supporter might have and send out a Life Changers legacy pack, if requested. More general information about gifts in Wills is also available online.

Q. What information should be included in a Will, to ensure Guide Dogs receives it?

Please quote our Central Office address which is our official registered address and registered charity number (see back page for details).

Q. What if I'm asked for legal advice?

Under no circumstances should Guide Dogs volunteers, staff or service users give legal advice. If asked, we should always recommend that a potential legator seeks independent advice. This is to ensure that we've acted appropriately and not exerted any undue pressure on potential donors.

Q. What if I'm asked to recommend a solicitor to write a Will?

Again, it's vital that anyone connected with Guide Dogs doesn't offer legal advice and this includes recommending a solicitor. If you do get asked this question, it's best to direct the supporter to the Free Wills Network service or Bequeathed.

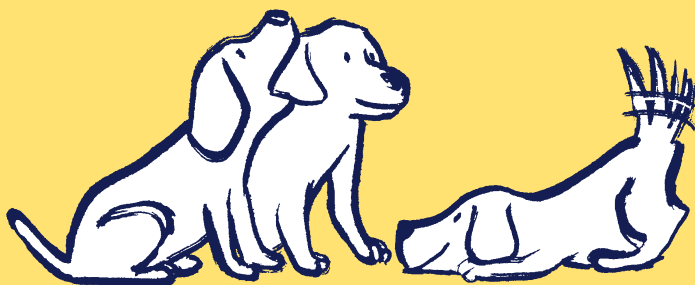
Q. Is it possible to leave money in a Will to Name A Puppy?

Yes, it is possible to leave a gift for a specific purpose, item or geographical location. This would include the request to name a puppy. A legacy is such a personal gift, it is so important that Guide Dogs can understand and correctly interpret the heart of the supporter's intentions so that we are able to fulfil any expressed wish, if possible.

This can be best achieved by talking to a solicitor or legal representative and expressing the request in a Will or accompanying letter of wishes.

We would ask that any special requests relating to the purpose of a gift are talked through with the LEO first so that we can ensure that the intention is clearly understood, and that Guide Dogs is able to fulfil this, so the legacy gift doesn't fail.

It's worth noting that if a gift is explicitly left for purposes that aren't possible, a legacy gift would fail, and Guide Dogs wouldn't benefit; whereas if a Will is drawn up with an intention expressed as a wish rather than a binding restriction, a legacy can still be realised, and the supporter's intentions still honoured.



Q. What if an Executor or Next of Kin requests that we name a puppy, but it isn't detailed in the Will?

Supporters can choose what gift they wish to leave to support Guide Dogs' amazing work and they can tell us what is important to them, and what they wish to be achieved as a result of their kindness. We always put the supporter's (the legator) wishes and legally expressed intentions at the heart of any conversations with Executors or Next of Kin. We need to ensure that any request to recognise the legacy was what the legator had intended, as it is their gift.

If you have a conversation, however casual, with anyone who has an interest in leaving a legacy gift, please don't promise anything as we may not be able to fulfil that promise. Please talk to us first.

We have a Legacy Case team who are appointed by Guide Dogs' trustees who ensure that the wishes of the legator are followed, they act as "guardians" of every legacy gift. We always must remember the most important thing is the person giving the money (the legator), and the wishes that they have expressed.



Q. I'm a Treasurer of a Fundraising Group – what do I do if we receive a gift in a Will from a local supporter?

It's important that all income received from gifts in Wills is sent to the Legacy Case team in Central Office to be banked. This team is the only one with permission from the Trustees to issue receipts and thank you letters to the executor of charitable estates.

This may sound very strict, but from a legal point of view, it's vital that this procedure is followed. The laws around these types of gifts and the legal obligations on executors mean that it's extremely important that you tell the Legacy Case team as soon as possible if you think a donation may have come from someone's estate.

It's also really important from the family's point of view as well. The Legacy Case Team receive notifications of all Wills involving Guide Dogs. If the gift is banked elsewhere, there's a possibility that the team will contact the Executor about a gift that we have already received. As you can imagine, this causes unnecessary distress at a very difficult time and makes Guide Dogs look uncaring and unprofessional.

The Guide Dogs legacy team

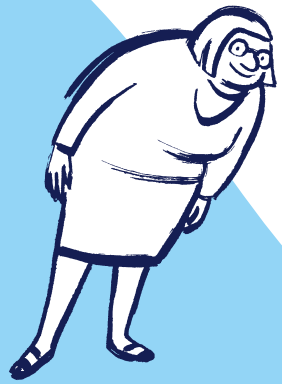
Who does what?

Legacy Engagement Team – this is our regionally based team and our main role is to engage with supporters, the general public to encourage the idea of leaving a gift in a Will to Guide Dogs. You may have attended one of our local reception days as a guest or a speaker. Your local LEO is a member of the engagement team.

Legacy Campaigns Team – this team is based at Central Office and looks after all our direct marketing and tele fundraising campaigns, promoting gifts in Wills and donating to Guide Dogs in memory of a loved one. This is the team that looks after our annual Guiding Stars appeal and send our much-loved legacy calendar to supporters who have let us know that they have left a gift in their Will to Guide Dogs

Legacy Case Team – also based at Central Office, this team works with executors and solicitors to manage the gifts left to us in Wills in a timely manner. The team has a legal obligation to make the most of every gift, whether large or small and to act as the representative of the legator, ensuring their wishes are respected and carried out. Alongside this vital work, the team continues the process of forging long-lasting relationships with the family of the legator.

Find out more



Join us at one of our Reception Days, a chance to see just how a gift in a Will supports our work in your local area. You'll hear talks from local staff and volunteers who'll share their personal and life-changing stories. If you have friends, family or local contacts who you think might like to attend, please contact your local LEO who will send out an invitation.

There's a short video on our website all about our Reception Days. Visit www.guidedogs.org.uk/giftsinwills

We are always looking for puppy walker or guide dog owner speakers for our events, so if you would like to take part, please contact your local LEO – we'd love to hear from you!

Or join us at one of our special Discovery Days, especially for staff and volunteers. This is a chance to find out a little bit more about Guide Dogs and gifts in Wills and share ideas on how best to raise awareness in your local community. Contact your local LEO for more information.

Finally, did you know...?

Over the years, thousands of kind supporters have made the decision to leave a gift in their Will to Guide Dogs. These gifts have ranged from under £10 to over £1 million, and every amount in between. We've also had some 'unusual' gifts from jewellery to paintings to a 1/3rd share in an estate which comprises a small village in Devon!

Whatever the size, Guide Dogs is grateful for every single gift. Each one, large or small, makes a real difference to people living with sight loss in the UK.

We know one thing for sure, the more we raise awareness about the importance of gifts in Wills to Guide Dogs, the more our supporters will respond. Thank you for helping us raise awareness about gifts in Wills in your local area. It has meant and will mean a world of difference to people living with sight loss.



3 key things to remember:

- Leaving a gift in a Will to Guide Dogs is just another way of supporting a charity you admire.
- Our key legacy messages can plant that vital seed and encourage our supporters to consider this important step. All you need to do is to integrate and weave these key messages into your normal day to day volunteering activity.
- If you have a question about gift in Wills and Guide Dogs and need some help, just contact your local LEO.

Your local LEO

Thank you for your help and don't forget to call if you have any questions or need any further information. Or contact your local Community Team or Training School to put you in touch with your local LEO.

We also have a dedicated email address: LEOS@guidedogs.org.uk

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