

We help people find a way forward.

We provide free, confidential and independent advice to help people overcome their problems. We are a voice for South Gloucestershire residents on the issues that matter to them.

Our advice will always be free. Could you leave a gift to help those who will need us in the future?

Can't give now? Give later!

Considering a gift in your Will is a great way to give later when you don't have the means to give now - and it doesn't have to be a significant amount. Your gift will make all the difference to our work.

To find out more about Gifts in Wills, call: 01454 334961 or email: katie.collier@southgloscab.org.uk www.southgloscab.org.uk



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Citizens Advice South Gloucestershire, Kennedy Way, Yate
BS37 4DQ
Registered charity number 1037480.

Giving a gift in your Will
Have you thought about it?



**citizens
advice**

**South
Gloucestershire**

What does it mean to leave a gift in my Will?

It simply means making sure your Will states that you would like to give a fixed amount (or portion) of money to charity. Do I need a solicitor?

You don't need to use a solicitor, you can actually write your own Will. However, we always advise people to use a professional **Will writing service** to prevent any mistakes.

You may need advice from a **solicitor** if you have assets in excess of the Inheritance Tax threshold, you have a large or complex family, or you wish to create trust arrangements.

To help you plan: Will Planners can help you think through what you want to leave.

They are available from Will Aid: www.willaid.org.uk/will-makers/materials

Will-writing services can be found through the Institute of Professional Will Writers: www.ipw.org.uk
South Gloucestershire solicitors can be found by postcode: <https://solicitors.lawsociety.org.uk/>

Why should I leave a gift in my Will to Citizens Advice South Gloucestershire?

How we helped in 2022:

2,727 local people were helped **face to face**. 3,181 helped by **email and webchat**. 9,350 **phone calls** were made. We saved local people an **incredible £4.4m** with our advice and benefits support.

Your feedback: 6 in 10 people said they felt less stressed, depressed or anxious as a direct result of our advice. **87%** of people would recommend our services to a friend.

Our vision for the future:

We will continue to help people find a way forward, whenever they need us. We will continue to provide **free** advice to local people aged 15-105! We want to do more campaigning and lobbying of local issues that *really* matter to South Gloucestershire.

"I thank goodness Citizens Advice exists, to help those who, for whatever reason, aren't really able to help themselves, be it on a temporary or permanent basis."
Client from 2022

So how do I go about making a Will?

If I want to give a gift in my Will to Citizens Advice South Gloucestershire, what information do I need?

Our registered name: Citizens Advice South Gloucestershire

Our registered charity number: 1037480

Our registered address: Kennedy Way, Yate, South Gloucestershire BS37 4DQ

Do I need to let you know if I have added you to my Will?

No, not at all! We would be delighted to know if you have so we can keep you updated on our future vision and plans (if you would like to know) and it would help us anticipate future financial planning, but there is no obligation.

If I'm interested in finding out more, where do I go?

Go to our Gifts in Wills page through our website www.southgloscab.org.uk or phone our admin line to speak to Katie Collier (with no obligation) on **01454 334961**.