



**Not**  
*forgotten*



**Your guide to  
leaving a gift  
in your Will**

# Be part of a kinder future for people living with dementia

**Alzheimer's Society was founded in 1979 to tackle injustice. At the time there was very little, if any, information or support for carers or families. They were often left completely alone to deal with the emotional, financial and practical impact of the condition.**

People living with dementia were being forgotten. Their needs and wishes disregarded. Their futures given up on.

Through Alzheimer's Society, people affected by dementia came together to say this wasn't good enough. You've supported each other. You've helped provide the face-to-face and online services that allow people to live full lives for as long as possible.

And you've funded the scientific research that gives us hope of a kinder future, when this terrible condition no longer devastates so many lives.

We've come a long way together, but there's still a distance to go before we can say that we live in a society free from injustice affecting people living with dementia.

**Because** better treatments and a cure can't come soon enough...

**Because** the system needs to do better...

**Because** people with dementia must not be forgotten, please leave a gift in your Will to Alzheimer's Society.



## 1979

**Two carers, Cora Phillips and Morella Fisher, team up with scientists and other concerned people to form a new group: the Alzheimer's Disease Society. Their aim is to address the injustice caused by the lack of information and support available to people affected by dementia.**

## For me, as it may be for you, dementia is personal.

Little by little, day by day, it robbed me of my independent, organised mum who I'd always been able to depend on. She doesn't know me now, but I don't think she loves me any less. It's important to me not to let this condition define my memories of her. And I will not rest while it continues to define the memories of anybody else.

I want to fight back against dementia, and I believe the best way any of us can make sure that people with dementia are not forgotten is by leaving a gift in our Wills.

These gifts can fund vital research, allowing us to commit to supporting scientists looking into the diagnosis, treatment and prevention of dementia. My dearest wish, which you may share, is that researchers one day find a cure and people's lives will no longer be torn apart by this cruel disease.

I know this is ambitious, but I believe that, with the foresight and understanding of supporters like you, it is possible. And until that day comes, gifts in Wills are also critical to helping us campaign to reform the broken



social care system and maintain the support services that are a lifeline for the dementia community.

Leaving a gift in your Will sends a powerful message – that you stand against the injustice that blights the lives of so many people living with dementia, and that you want to help create for them a fairer, kinder future.

Warm regards

*Kate Lee*

Kate Lee  
Chief Executive Officer,  
Alzheimer's Society

*Go to page 8 for answers to your questions about gifts in Wills.* →

# Your legacy could bring us closer to a world free of dementia

**When what was then known as the Alzheimer's Disease Society was founded over 40 years ago, dementia research was rudimentary. There was little interest or investment in research, and no large-scale university programmes.**

Our official research programme launched in 1990 and, thanks in no small part to people who have left gifts in their Wills, we have now invested more than £70 million in over 500 research projects.

**The research that supporters fund has played a part in some of the biggest developments in dementia research to date.** One of our first grants led to a fundamental breakthrough in the genetics of Alzheimer's disease, helping to

identify the genetic cause of a rare inherited form of the disease. This genetic understanding has provided important clues to guide research uncovering the causes of Alzheimer's.

We've made significant progress in care research too. For years, many people living with dementia in care homes were being prescribed antipsychotic medication inappropriately, bringing a risk of severe side effects. In 2005, we funded researchers to develop specialist training to address this. This focused attention on the overuse of antipsychotics and significantly reduced their use in care homes.

Developments in exciting areas like immunology, drug repurposing and genetics mean that, today, a step change in the diagnosis, treatment and prevention of dementia is possible. **The only thing holding us back is limited funding.**

Research breakthroughs, however, rarely happen overnight. In drug development, for instance, arriving at



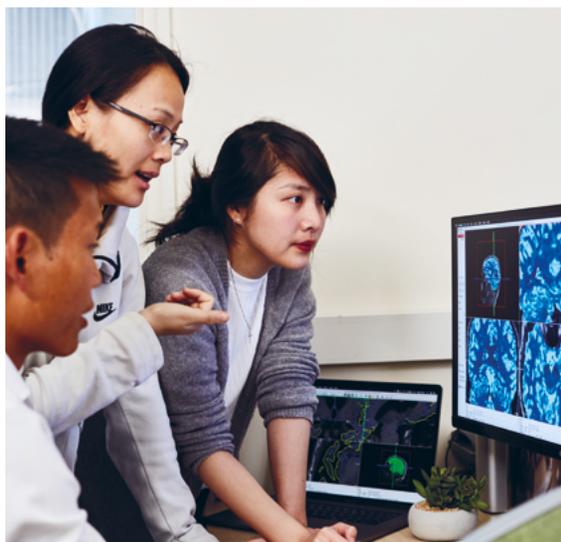


'If we look at the wonders medical research has achieved over recent decades in areas that have been much better funded, like cancer, it makes me believe that, with enough funding, we can beat dementia too.'

**Dr Sarah Ryan,  
University of Manchester**

an effective new treatment involves testing many different possible therapies, first in the lab and then in clinical trials. Huge amounts of data need to be processed to give conclusive evidence of whether or not a new treatment is effective. This requires dedication, determination and time.

**With a gift in your Will, you can help scientists build on the accumulated knowledge of the last 40 years, and carry out the painstaking work that has the potential to transform the lives of people living with dementia, now and in the future.**



*On page 10 you can find the legal wording you can use to leave a gift in your Will.*



# 1983

**The gifts of supporters allowed for the launch of the Caring Fund, to help families struggling to pay for caring duties. Their generosity also allowed the first investments in research, with a small number of project grants and fellowships being awarded.**

# Your gift can bring the change people living with dementia need

**If people affected by dementia don't stand up for each other, nobody will.**

We live in a world where the care and support needs of people affected by dementia are all too often forgotten, neglected or ignored. Decades of underfunding have led to a social care system that's difficult to access, costly, inadequate and unfair. This has a devastating impact on people living with dementia and their loved ones.

Many users of the social care system are people affected by dementia, which is why we relentlessly campaign for reform. And we believe this reform must have quality dementia care at its heart. We will continue to call on national and local government to

provide quality social care that is easy to access, no matter where you live. People affected by dementia deserve and need better care.

At Alzheimer's Society, we've seen time and again that **change is possible**: that when we come together as a community, we can win justice for people affected by dementia.

In 1989, supporters like you successfully campaigned for people with Alzheimer's to be exempt from paying Poll Tax. In 2001, following a three-year campaign, the National Institute for Clinical Excellence (NICE) announced its decision to support the availability of dementia drugs on the NHS.



‘The coronavirus pandemic hit the dementia community hardest and highlights how vital it is we continue to campaign for a more compassionate care system. Gifts in Wills can bring us closer to a social care system that is free to all at the point of use.’

**Fiona Carragher,**  
**Director of Research and Influencing**



More recently, in 2015, we secured manifesto commitments to improve dementia provision from all five major parties, as well as influencing the Government to commit £150 million to establishing a world-leading Dementia Research Institute. Through our ongoing Fix Dementia Care campaign, we're continuing to put pressure on Westminster and the devolved governments to honour

their commitments to improving care.

**A gift in your Will can help create a fairer world for people affected by dementia.** It can be a powerful statement against injustice and help make sure we're here to continue to champion the rights of people living with dementia, their carers and families.

*Do you have questions or want to discuss what your gift could achieve? You can find our contact details on page 16.*



## 1990

**After reaching 10,000 members, the Society campaigned successfully to ensure the Government increased income support for people living with dementia. We also received our first-ever gift left in a Will – helping safeguard the future of the Society's work and campaigns.**

# Your gift to ensure people living with dementia are not forgotten

**Making or amending your Will can, at first, seem a little daunting. But with the right information, and support from a solicitor, the process can be relatively straightforward.**

We hope the following information will help to make leaving a gift stress-free and simple. And if you have any further questions, please don't hesitate to get in touch using the contact details on page 15.

## A gift in your Will: your questions answered

### **Do I need to use a solicitor?**

While anyone can write a Will, there are certain requirements to make sure that it is valid and your wishes will be respected, so it is best to speak to a professional. Working with an SRA regulated solicitor will give you the most peace of mind, especially if your affairs are complex or you want to discuss them in person.

### **I want to take care of my loved ones first. Can I still leave a gift?**

Of course. Even 1% of your estate,

after family and friends are provided for, could make a huge difference. It could help our support services reach more people in the years to come and fund the research that contributes to a future free of dementia.

### **Will I pay tax on my gift?**

No. Gifts to charities are exempt from Inheritance Tax. They can even reduce the amount of tax your estate has to pay. Please visit the HM Revenue & Customs website for details.

### **How much should I give to make a difference?**

Some gifts we receive are large. Many



# 1998

**The National Dementia Helpline (now the Dementia Connect Support Line) is launched thanks to the donations of supporters, and receives over 24,000 calls in the first year. We also launched our website, [alzheimers.org.uk](http://alzheimers.org.uk), to provide information about dementia and support for carers.**



are not. But together they fund over 25% of our work. So anything you give will be vital in helping us maintain or, if needs be, expand our vital services.

### **What type of gift can I leave?**

There are three types of gift. Many supporters prefer to leave a residuary gift, or percentage of their estate. This type of gift gives people the reassurance of knowing it will be protected against inflation. You could also choose to leave a pecuniary gift, which is a fixed sum of money, or a specific gift of individual possessions.

### **What wording should I use to leave a gift to Alzheimer's Society?**

You can find the specific wording you can use on page 10.

### **What is an Executor?**

An Executor is the person you choose to make sure your wishes, as laid out in your Will, are adhered to. This can be a family member, friend or trusted professional.

### **I already have a Will, how do I leave a gift to Alzheimer's Society?**

You can do so by adding what is

called a 'codicil', which is a legally-binding amendment to your Will. We recommend you talk to your solicitor before adding a codicil. If you do, it's a good idea to keep it in a safe place with your existing Will.

### **Isn't making a Will very expensive?**

Drawing up a simple Will should cost between £150 and £300. More complicated personal situations or requirements generally increase the cost. The peace of mind it can give you, however, can be priceless, as doing so will ensure your estate isn't stuck in probate for months after you die.

### **Can Alzheimer's Society help with the expense?**

Yes. Our Will-writing services provide supporters like you with trusted partners and discounts in order to help you write your Will in a cost-effective way. More details can be found on page 15, or you can get in touch with us at [legacies@alzheimers.org.uk](mailto:legacies@alzheimers.org.uk)

# Wording for your Will

**Thanks to the efforts of generations of supporters, Alzheimer's Society has continued to support people with dementia, their families and their carers, so that nobody has to face dementia alone.**

Your solicitor can use the wording and details below to ensure that your wishes are carried out.

## To leave a share of your estate

'I give my Residuary Estate [residuary estate will need to have been defined elsewhere in the Will and is a gift made after deductions of debts, taxes and expenses, which usually fall on residue] to Alzheimer's Society of 43-44 Crutched Friars, London, EC3N 2AE, Registered Charity Number 296645.'

## To leave a cash gift

'I give the sum of [£ in words and numbers] absolutely to Alzheimer's Society of 43-44 Crutched Friars, London, EC3N 2AE, Registered Charity Number 296645 and I declare that the receipt of the treasurer or any other proper authorised officer of any charity benefitting under my Will shall be a sufficient discharge for my Trustees who shall not be concerned as to the application of any gifts or payment.'



'My mum had dementia, and when I felt I could no longer help her, I reached out to Alzheimer's Society. It was the first time anyone had listened to me and offered useful advice. Now I am left with hope that people living with dementia and their carers can have a fulfilling and meaningful life.'

**Anne Maitland, who has left a gift to Alzheimer's Society in her Will.**

# 'I want to remember Dad – and to support other families coping with dementia'



## Rob Catlow explains why he's leaving a gift in his Will to Alzheimer's Society.

'Dad worked in the aircraft industry his entire working life and maintained an interest in aviation until the end. He was also a keen football fan, supporting his hometown team Leicester City. Most of our telephone conversations were around sport, until the time came when he couldn't remember the results anymore so we had to talk about games from the past that he did remember.

'I didn't really understand what dementia was back then and thought he'd get better. I didn't know what was happening inside his head and some of the simple things that could be done to make his life easier.

'Alzheimer's Society helped me understand what dementia really means, and I'm now passionate about increasing other people's understanding, so they don't make the mistakes I did.

**'I'm very happy to leave a legacy, and I'm sure it will be used effectively when the time comes – which I hope won't be for a while yet!**

'It might be used to fund frontline support, or research into ways of making people's lives easier via technology, but my greatest hope is that cures for the various types of dementia can be found.'



## 2013

**The Dementia Friends programme began, offering training for people to better understand dementia. Its continuing aim is to transform the way the nation thinks, acts and talks about the condition.**



## In the future, nobody should face dementia alone

**A gift left in your Will can help us maintain – and in the future, invest in and develop – our extensive range of support services for people with dementia and their families.**

These services are about providing expert support and guidance, and sharing experiences – they're about being there and helping people through the dark days that dementia inevitably brings.

Our nationwide team of dedicated **Dementia Advisers** provide support face-to-face, over the phone and online, getting to know the concerns and challenges of the families they work with and helping them with everything from day-to-day living to negotiating the benefits system.

The **Dementia Connect Support Line** (0333 150 3456) is there to help people living with dementia, their families and carers with the numerous concerns and worries the condition can bring.

**Talking Point** provides an invaluable online space for families to share their

experiences of everything from legal issues to practical day-to-day care.

**Singing for the Brain**, meanwhile, brings happiness into the lives of thousands of people living with dementia, allowing them to enjoy the therapeutic benefits of music together.

During the coronavirus pandemic, these services stepped into the gap left by government neglect, to provide a lifeline to people experiencing anxiety and fear under lockdown. We were only able to adapt our services, and provide important new ones like Companion Calls for people struggling while isolated at home, thanks to the financial flexibility that gifts in Wills provide.

Everybody who has first-hand experience of dementia knows that even in the best of times, it can feel overwhelming. A gift in your Will can make sure that in the future everybody who needs help or support will have somebody to turn to.

# ‘It’s about giving people the time and the space to explore how they feel.’

**Telephone Dementia Adviser Denise Maguire, from Northern Ireland, explains why she wants to ensure people affected by dementia always get the support they need.**

‘There’s never a typical call. It could be anything from, ‘how do I access support at home?’, to ‘how do I access benefits?’, to talking through really complex strategies of how to manage someone’s behaviour and how to keep someone safe.

‘People experience so many emotions. There’s guilt, there’s worry, there’s fear. We talk to people who are at the stage where they’re considering having to move someone into full-time care, and that’s a huge conversation because they feel like they’re losing their loved one.

‘It’s a privilege to help and hugely inspiring that people support us with donations – and a gift in someone’s Will is the ultimate. It’s a reminder that what we’re doing really matters to people, and the fact some people leave a gift to make sure others get support is amazing.’



## The future, with your support...

**People affected by dementia will always need somebody who will listen when they’re struggling, and fight their corner when it seems the system doesn’t care. Somebody who can give them hope. A gift in your Will can make sure people affected by dementia are not, and never will be, forgotten.**



## The future needs of people living with dementia

**Somebody develops dementia every three minutes. At the time of writing, there are over 850,000 people in the UK living with dementia. With advances in medical science leading to people living longer, this number is set to increase significantly in the near future. Dementia is also responsible for more deaths in the UK than any other condition.**

Facing up to dementia, and helping the people affected, is one of the biggest challenges of our time. **A gift in your Will can make sure people with dementia are not forgotten.**

If you decide to leave a gift in your Will, it will help Alzheimer's Society plan effectively for the increased need for our support and, as detailed on the previous pages, support three key areas of our work: funding lifesaving research, campaigning

for improvements to the social care system and providing our range of vital support services.

A gift left in your Will is also an opportunity to make a statement about who you are and what matters to you. It's a chance to pass on your values to future generations in the research you help fund and services you help provide, in the fairer world you will help make possible for people affected by dementia.

# Help with writing your Will

Whichever of our Will-writing services you decide is right for you, there's no obligation to give a gift in your Will to Alzheimer's Society. However, many of our supporters do choose to leave a gift to Alzheimer's Society, in recognition of a cause they care deeply about.



## With a local solicitor

With Will to Remember, you can access professional legal advice to write or update your Will at a discounted rate. If you take part in the scheme, you can get £150 off legal services, however complex your Will is. Visit [alzheimers.org.uk/willtoremember](https://alzheimers.org.uk/willtoremember) to sign up.



## Online

If you live in England or Wales, you can write your Will quickly and easily online for free through our partner **Farewill** – the largest online Will-writing service in the UK. Visit [alzheimers.org.uk/farewill](https://alzheimers.org.uk/farewill) to get started.



## Over the phone

Farewill can also help you to write your Will over the phone, wherever in the UK you live. Visit [farewill.com/as-phone](https://farewill.com/as-phone) to arrange a call back within 24 hours – when Farewill's specialists will take you through the whole process from start to finish.

Please call our friendly team on **0370 011 0290** if you have any questions at all about these services or your Will.

**Because** a cure can't  
come soon enough...

**Because** the system  
needs to do better...

**Because** people with  
dementia must not  
be forgotten.

**Please use these  
contact details if you  
would like to discuss  
your Will or have  
any questions.**

**Telephone** 0370 011 0290

**Email** [legacies@alzheimers.org.uk](mailto:legacies@alzheimers.org.uk)

**Alzheimer's Society**

Legacy Team, 43-44 Crutched Friars, London, EC3N 2AE

Registered charity no. 296645. Alzheimer's Society  
operates in England, Wales and Northern Ireland.



**Thank you**



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