

A GUIDE TO LEAVING A LASTING LEGACY



The difference you can make by leaving a legacy gift to the RNOH Charity



THE RNOH CHARITY IS A VITAL PARTNER IN THE WAY THE RNOH DELIVERS CARE

Since the RNOH Charity was established in 1997, we have funded numerous essential projects at the Royal National Orthopaedic Hospital.

These have included: the creation of a new Children's High Dependency Unit; the expansion of the London Spinal Cord Injury Centre; essential equipment for every bed space in the hospital's Stanmore Building; cutting-edge scanning equipment; and a number of pioneering research projects.

This guide shows you how important gifts in Wills are to our work, and how you can make a difference. You'll find out how leaving a gift to us in your Will could transform the lives of people with acute musculoskeletal problems.

Our achievements would simply not have been possible without legacy gifts, which account for around a third of all donations we receive.



*Caitlin at the
age of seven*

CAITLIN KYDD is just one of the many people your support could help. At the age of seven, Caitlin underwent a life-saving operation to remove a tumour from her femur, and received an extendable, 'bionic' prosthesis – a revolutionary piece of technology that was developed by RNOH specialists and which is now used all over the world. Four years later, Caitlin was given a similar prosthesis in her arm. Like so many of our patients, Caitlin will continue to receive treatment at the RNOH for years to come.

*Caitlin
today*





Professor Tim Briggs CBE

Professor of Orthopaedic Surgery

Director of Clinical Strategy & External Relations, RNOH

WHY LEAVING A LEGACY TO THE RNOH CHARITY IS SO IMPORTANT

"Since the establishment of the RNOH in 1905, gifts left in people's Wills have been a vital part of our funding. Today they help us to finance cutting-edge research and develop new clinical and medical treatments. They also make it possible for us to buy state-of-the-art equipment and improve our facilities, for the comfort and benefit of patients, in ways that could not be achieved within the limits of normal NHS funding.

The RNOH is a recognised national and international centre of excellence. It is at the forefront of work in orthopaedic diagnosis, treatment, surgery, rehabilitation, research, and in training future doctors and nurses for the NHS. Please help us to keep it there.

Any contribution you make will be of great value to the hospital; even a small amount can make a big difference. Thank you."



A GIFT IN YOUR WILL COULD MAKE ALL THE DIFFERENCE

We absolutely understand that your loved ones are likely to be your priority when the time comes to write your Will.

But just a little of what's left, once they've been provided for, could leave a lasting legacy at the RNOH that would strengthen the hospital's service for years to come.



WHAT COULD A GIFT IN YOUR WILL ACHIEVE?

Leaving a gift in your Will to the RNOH Charity will make sure we can plan far ahead, and achieve our long-term vision:

- Replacing RNOH Stanmore's dilapidated buildings with facilities that match the hospital's world-class service
- Funding state-of-the-art equipment and cutting-edge research
- Making the patient experience even better through additional services that only the Charity can fund
- Supporting staff training and education in orthopaedic medicine



THE POWER OF LEGACY GIVING

– A CASE STUDY

In recent years, the RNOH Charity has committed millions of pounds' worth of funds towards a range of projects at the RNOH. Around a third of this funding has come from gifts left to us in Wills.

One of the major projects that we have funded is the enhancement of the RNOH's new Stanmore Building.

The Stanmore Building offers the very best ward facilities for RNOH patients, and allows staff to work in a setting matching their skill and dedication. Its construction came after a thirty-year campaign to replace many of the hospital's old ward buildings that date from World War Two.

There are five floors in the £50 million building, offering the very latest inpatient facilities. Thanks to the incredible generosity of the RNOH Charity's donors – including our legacy donors – we were able to fund a number of elements of the new building which were not affordable within the limits of NHS funding. These include two new therapy gyms, an interactive children's activity centre, a range of enriching artwork, and enhancements and equipment for every single bed space.

The RNOH Charity is thrilled to be making such a difference to patients and their families. We have funded enhancements including:

- Fold-down beds next to patients' bedsides for family members
- State-of-the-art overhead hoists and travel systems which assist our disabled and elderly patients
- Specialist chairs for our patients with scoliosis
- High-quality entertainment and communication systems, providing a range of television channels, internet access and Skype facilities
- Pepper, an interactive robot, designed to improve the experience of the RNOH's young patients
- An outdoor garden and play area for children undergoing treatment
- Beautiful artwork to provide an uplifting experience for our patients



Dominic Dodd
Chair of the RNOH NHS Trust



“The Stanmore Building is the first step in putting in place our vision for a modern Stanmore site to match the RNOH’s standing as an international centre of excellence in specialist orthopaedics. The new building and patient facilities provide a wonderful environment for patient care and would not have been possible without the leadership shown by the RNOH Charity and the generous support of all of its donors. On behalf of the RNOH’s patients and staff, thank you so much for making it happen.”



INVESTING IN THE FUTURE OF THE RNOH

A deferred gift

For many people, one of the most effective ways of supporting a charity is to leave a legacy. Funds may not be readily available to make gifts during their lifetime, but a legacy is sometimes the greatest gift that they can afford. Please read on for further information about making a legacy donation.



Leaving a legacy

There are three types of legacy:

Residuary legacy – what remains after specific bequests to family, friends etc.

Pecuniary legacy – a fixed sum of money.

Specific legacy – e.g. property or other specific item.

Assessing your estate

Before you draft your Will, you should:

1. List everything that you own – your property, shares, investments, life insurance policies, bank balances, and all your valuables and possessions.
2. Make a rough calculation of the value of all these assets.
3. Decide which people and/or charities you would like to benefit from your estate.



DRAFTING YOUR WILL

It is always best to ask a legal adviser to draft your Will. He or she will know the appropriate wording to use, and can avoid ambiguities and minimise the potential for misunderstandings. In the meantime, these three basic rules may be helpful:

1. Two witnesses must be present when you sign your Will. They must be of sound mind and vision. You must also be present when they sign the Will.
2. Your witnesses do not need to know the content of your Will, but you must not use as a witness anyone who will benefit, or whose spouse will benefit, from your Will.
3. The Will should set out the arrangements for distributing all your estate. It should appoint between one and four people as executors. It should also dictate who is to receive any residue after the specific sums have been allocated.

Let people know what you have done

It is essential that your executors know their role and where to find your last Will, which should be somewhere safe, e.g. with your legal adviser or your bank. It is therefore helpful if you brief your executors about this and also provide them with key contacts in respect of your bank account, insurance, investments etc.

Adding to an existing Will (codicil)

You can easily update your Will using a codicil. This is a separate document which makes a simple amendment to your current Will. It is witnessed in the same way as your Will and stored with it. To add a 'codicil' to an existing Will, you will need to contact your legal adviser.

A word on inheritance tax

If the total value of your estate is more than £325,000 (the current inheritance tax threshold), your beneficiaries will have to pay 40% inheritance tax on the amount over £325,000. Gifts to charities in your Will are generally exempt from inheritance tax. If you leave a charitable gift it will be deducted from your estate before inheritance tax liability is calculated.

INCLUDING THE RNOH CHARITY IN YOUR WILL

When you visit your solicitor to draft or amend your Will, you must include the important details listed below.

Our full name, address and charity number:

RNOH Charity
Royal National Orthopaedic Hospital NHS Trust
Brockley Hill
Stanmore
Middlesex
HA7 4LP

Registered charity number 1166129

The RNOH Charity's Living Legators

Letting the RNOH Charity know you have left a legacy is important and extremely helpful because:

- It helps us plan for the future.
- It allows us to work with you in directing your legacy to the area of the hospital's work that is most important to you.
- A 'Living Legacy' means that, in consultation with you, the RNOH Charity can express its gratitude and arrange appropriate recognition of your generosity.

Our pledge of discretion

We respect the fact that giving is a very personal and entirely voluntary decision. Please be assured that any personal information you provide us with will always be treated in line with the General Data Protection Regulation (GDPR), and the RNOH Charity's Privacy Policy. Our Privacy Policy can be viewed on our website, **[rnohcharity.org](https://www.rnohcharity.org)**



Jane Chappell
RNOH Charity legator

"I was treated at Stanmore over a period of more than 30 years, needing hip replacement and revision surgery as a result of a road accident.

The expertise of my orthopaedic surgeons and nurses gave me back my mobility and my ability to lead an active life.

At the end of my life, I'm leaving a legacy to the RNOH Charity to help fund research and treatment techniques to help future patients resume active lives too."



PLEDGE FORM

If you have included the RNOH Charity in your Will, and if you feel it is appropriate, please complete and return this legacy pledge form.

I want to invest in the future of the RNOH, and have left a gift to the RNOH Charity in my Will.

I would like to designate my gift towards the following:

- ☐ where most needed
- ☐ other (please specify)

My name

My address

Postcode

Email

Telephone

- ☐ Please tick here if you would prefer NOT to be recognised as a Living Legator

If you feel able to provide the following information it would be a tremendous help in our long-term planning:

My legacy to the RNOH Charity is:

- ☐ A specific sum of money (pecuniary legacy)
- ☐ A specific item (assets, shares)
- ☐ All, or part, of the residue of my estate

Please use this space for any further details you would like to add (e.g. the sum of money, the specific item etc.).

- ☐ I consent for my details to be added to the RNOH Charity database so that I can be sent occasional updates by post and email.

Please note that you have the right to withdraw consent to receiving information from the RNOH Charity at any time by writing to the address overleaf, stating your details, or by emailing rnoh.charity@nhs.net





Please return your completed pledge form to:
RNOH Charity
Royal National Orthopaedic Hospital NHS Trust
Brockley Hill
Stanmore
Middlesex
HA7 4LP

Telephone: 020 8909 5362
Email: rnoh.charity@nhs.net
www.rnohcharity.org



**RNOH
CHARITY**

Registered charity number
1166129