

Letter of Wishes

A Letter of Wishes is an informal letter, signed and dated by you, and addressed to your Executors, family members and friends that you can write or type yourself. Although it is separate from making a Will, a Letter of Wishes can provide extra guidance on how you wish your life to be celebrated and ensure that the gifts you wish to make from your estate are applied as you wish. Importantly, knowing your wishes and carrying them out can bring great comfort to family members and friends.

Unlike a Will, a Letter of Wishes does not become a publicly available document on death, so it allows you to leave more personal messages to your Executors, family members and friends. A Letter of Wishes does not require witness signatures but should be kept with your Will. A Letter of Wishes can be a very useful document in assisting your Executors, and one which can be updated as circumstances change. It may also serve as evidence in the event of a Will being challenged. It can be used to assist or guide your Executors on anything you wish, and is commonly used for:

- listing your main assets, including bank accounts, life insurance policies, valuable items, and their location;
- helping your Executors identify specific items you are gifting in your will, such as sentimental items (this can include attaching photos or descriptions);
- special instructions on funeral arrangements and ceremony (you should also discuss your funeral wishes with your family as they may not find or read your will or Letter of Wishes until it is too late) – it is much easier to change your instructions if set out in your Letter of Wishes;
- detailing your gifts to charity.

If you are intending to leave a gift to the Community Foundation, you may wish to consider including guidance to us in a Letter of Wishes. It is very important to us that we fully understand how you would like us to use your gift. You can name the Community Foundation serving Tyne & Wear and Northumberland as a beneficiary of a gift in your Will and then use a Letter of Wishes to explain how you would like us to use your gift to support the causes you care about the most. And if your interests change, you can change your Letter of Wishes and provide the Community Foundation with new instructions.

We very much welcome the opportunity to discuss your intentions with you and help you leave instructions so that your gift benefits the communities and causes that are important to you.

If you would like to talk in confidence about leaving a gift to the Community Foundation, please contact Lisa Cappleman, Head of Philanthropy Development on 0191 222 0945 or email lc@communityfoundation.org.uk