



THIS IS YOUR LEGACY

forward

Thank you for your interest in supporting our life changing work with a gift in your Will. We could not deliver our services without people like you.

This booklet explains how you can be part of this journey. It includes information about how to include a gift in your Will and what your gift can achieve.

The Forward Trust helps some of the most marginalised people in society, including people in active addiction, people in recovery, and people who are or have been in prison.

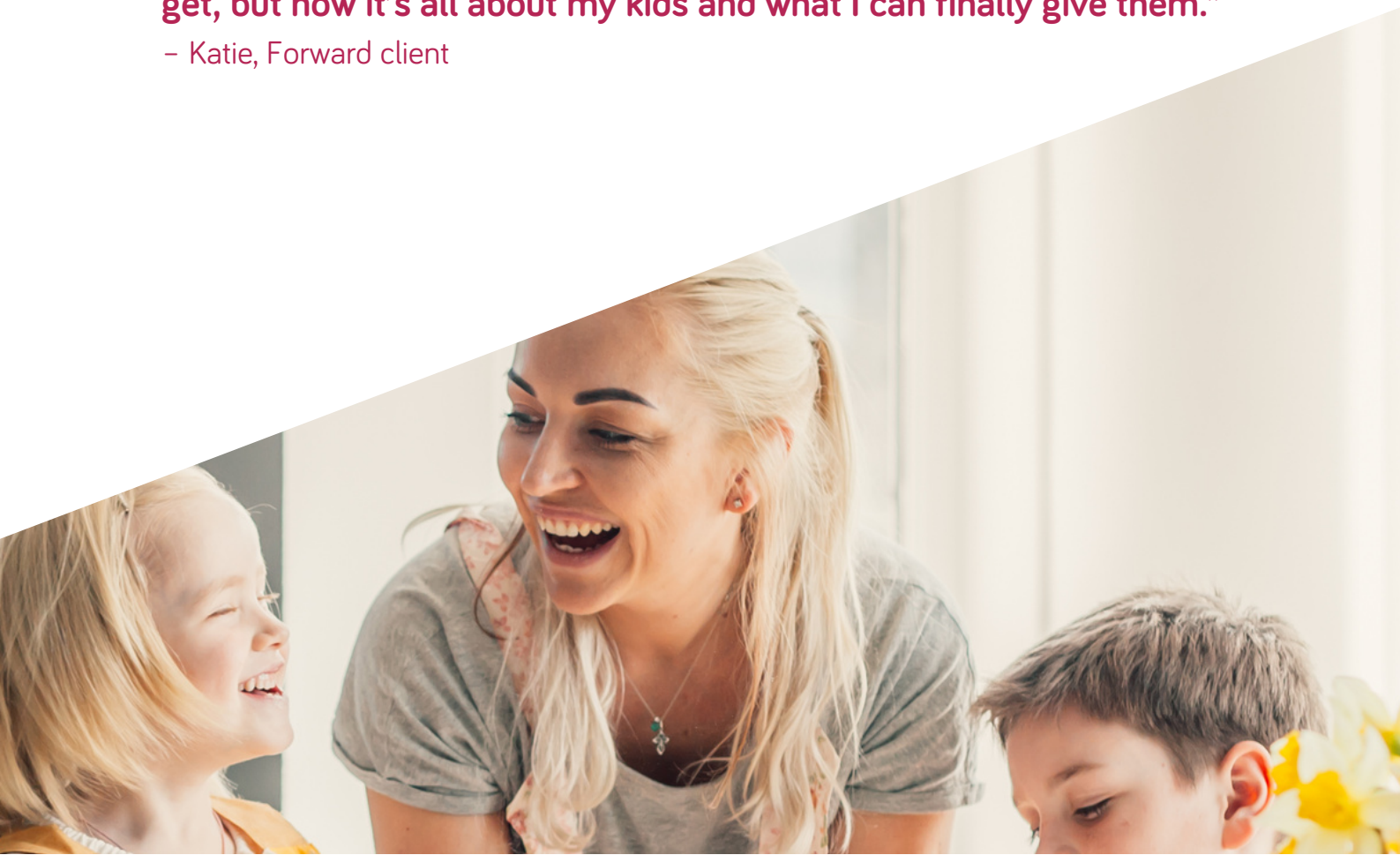
Supporters like you empower people to break the cycles of addiction or crime to move forwards with their lives and build positive and productive futures. We believe that anyone is capable of lasting change.

Our services have supported thousands of people to make changes and create better lives with jobs, family, friends, and a sense of community. Operating since 1991, we work with approximately 20,000 individuals each year.

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Forward helped me earn back love from my kids. Before I was in recovery, Christmas was always about myself and how drunk I could get, but now it's all about my kids and what I can finally give them.”

– Katie, Forward client



Our vision is that anyone – whatever their history or circumstances – gets the opportunity and support to live a positive life that fulfils their potential, and to inspire others to follow the same path.

We exist to help anyone impacted by addiction, crime, homelessness, or long-term unemployment to turn their lives around. Our services work to inspire the belief in a better life, and support people to achieve that goal. We also campaign to build awareness so that more people feel able to ask for help in a society that believes in the power of second chances and long-term recovery.

We deliver all our services with compassion and without judgement. We are a safe place to start a changed life and we will be there for people for however long it takes, because change and recovery happens one day at a time.



Leaving a gift in your Will

A legacy gift is a specific item or donation left in a Will, which is one of the most important legal documents you'll ever make.

Create your legacy by leaving a gift in your Will to The Forward Trust and help make a significant change to someone's life.

Your legacy could provide the tools and support to people like Antonia, to transform and empower their communities by creating hope and lasting change.



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Because of Forward, everything is different. Not only do I have a stable job and home, but I have dignity, self-respect, and really feel like I am giving back to society.

- Antonia M, Forward employee, and former Trainee

What your gift could do

When you decide to leave a gift to The Forward Trust, you can rely on us to use it carefully. We value every one of these gifts as they are vital in helping us reach some of society's most marginalised.

It will help us deliver a range of services and interventions, such as:

- Community and prison substance misuse (drug and alcohol) support, including advice, health and wellbeing, mental health, motivational work, clinical services, and a wide range of group programmes.
- Supporting families and friends affected by a loved one's drug or alcohol addiction.
- Working with employers to support people into sustainable jobs, self-employment, and apprenticeships.
- Working with Probation Services to engage those with a background in crime, in personal development and substance misuse programmes for long-term integration into society.
- Housing support to provide different accommodation options for prison leavers.
- Mental health services to support the mental health and wellbeing of prisoners.
- Support with gambling addiction in prisons.





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Clouds House threw me a lifeline and I just grabbed it. As soon as I walked through that door, my life started to change. The love, care, passion and warmth that all the staff showed me, from the counsellors to the meds team, to Terry and Myra in the kitchen, to the peers. It just ticked every single box. My life started to change.

- Marcus, Clouds House graduate

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While inside, I found Forward's substance misuse programme and got help for what I learned was my addiction to drugs. From then on, everything began to get better.

They gave me a chance. Becoming a trainee meant that I finished my sentence with a sense of security and stability, knowing I had a job to go to.

- Andy Jackson



With a gift in your Will, you can ensure we are able to help people like Marcus and Andy find recovery and inspire hope and motivation among others. It's only through the support of people like you that we can break the stigma of addiction, crime and homelessness from harming people's lives.

Our promise to you



When you leave a gift to The Forward Trust, we promise that:

- We will never pressure you to tell us your decision (although we'd love to have the opportunity to say thank you). We understand that your Will is personal
- We will always understand and respect that family and friends come first.
- We will never put you under any pressure – it's your decision to make in your own time.
- If you choose to remember The Forward Trust in your will, we will use your gift carefully, so it achieves the greatest impact for those we work with.
- We respect your right to change your mind at any time.

Types of gifts in Wills

- Residuary gifts – This is a percentage of your estate after all the other payments have been made.
- Pecuniary gifts – You may choose to leave a specific sum of money
- Specific gifts – You may decide you would like to leave a particular item of value, such as property, antiques, jewellery, and shares.

It is important that the gift is described precisely in your Will, so that the executors can understand exactly what you intended.



How to remember The Forward Trust in your Will



We all need a Will and making one is easier than many people realise. All you need to do is follow these simple steps:

- Make a list of your assets - Your assets include things such as property, shares, savings, and other items of value you own. The sum of these assets is your 'estate'.
- Make a list of your liabilities - consider any outstanding mortgages, loans, or bills. This will give you a much better idea of the complete value of your estate.
- Think about your assets and the people and/or organisations you'd like to leave them to. If you would like to leave a gift to Forward, you'll need our charity details which are The Forward Trust, Unit 106 Edinburgh House, 170 Kennington Lane, London, SE11 5DP, Registered Charity Number 1001701 (England and Wales).
- Appoint one person or more to be your Executor. This means they will be responsible for carrying out the instructions in your Will. This can be a friend, relative, or your solicitor.
- Use a solicitor or our solicitor regulated free will service to ensure your wishes will be carried out as you would want.
- Make a copy of your Will and ensure someone you trust knows the location of the original. Your solicitor will be able to advise on storage.

You can use the Will planner on pages 10 - 12 to capture these details all in one place.

If you choose to remember The Forward Trust, then we want to say a huge thank you.

We understand that your Will is a personal matter but letting us know your intentions will help us make plans for the future and means we can thank you properly for your support.

Updating an existing Will



Already have a Will? You can choose to either make a completely new Will or add a 'codicil' which would set out changes to your existing Will and be read alongside it.

We recommend you speak to your solicitor. A codicil is a supplement that outlines amendments or changes to an existing Will.

Writing an entirely new Will is a safe option. A codicil document can become misplaced from the Will it relates to. A new Will also stops any changes to your Will being made public after you die.

We are incredibly grateful to everyone who includes a gift in their Will to The Forward Trust, we couldn't do our vital work without your support.

Because of this, we offer our supporters the opportunity to write their Will for free with Kwil. Simply visit www.kwil.co.uk to begin.

Don't forget, you should review your Will every five years and after major changes in your life. For example, a change in your relationship status, having a child or moving house.

Will Planner



Want to prepare for your solicitors meeting? Use our will planner to gather the information you'll need, and all your thoughts in one place.

Your name:

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Your address:

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Your partners name:

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Your partners address (if different):

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Your children's names:

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Your children's addresses (if different):

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**If children are under the age of 18, who would you like to appoint as guardian?
Name and address:**

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Who will be executor of your will? Name(s) and address(es):

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Your estate



Use our handy table to calculate your total estate value

Assets	Amount
Property and land	£
Vehicles	£
Home contents, including furniture and fittings	£
Items of value, including jewellery and antiques	£
Savings in banks and building societies	£
Shares, investments/Premium bonds, etc	£
Insurance policies	£
Pensions	£
Other	£
Total	£
Liabilities	Amount
Mortgages	
Loans and overdrafts	
Credit cards	
Other	
Total	£

Assets - Liabilities = Total Estate Value

Total Estate Value =

£

Gifts



Use the below to plan the different gifts you'd like to leave to each person/charity. Visit page ... for a reminder on what each type of gift is.

Name and address	Residuary Gift	Pecuniary Gift	Specific Gift

Should you outlive any of the people you have mentioned, what would you like to happen to their gift?

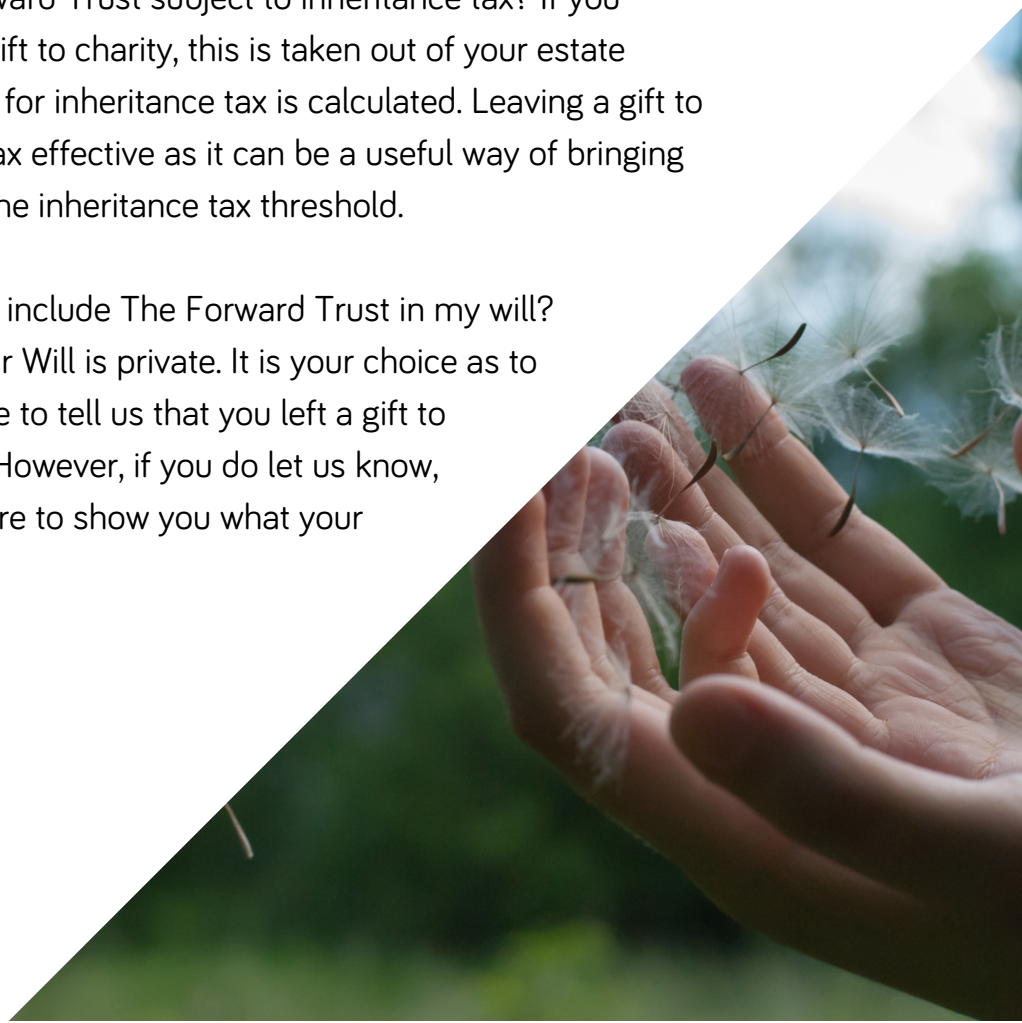


Frequently Asked Questions



Why should I make a will? If you die without a Will, you relinquish control over the distribution of your assets. It's possible that the law may distribute your property, possessions, and money in a way that aligns with your wishes, but it's best not to leave it to chance.

- Creating a Will eliminates uncertainty and ensures your assets are handled according to your intentions.
- My estate might not add up to much, is it still worth making a will donation? You might be surprised about the value of your estate, especially if you own your home, have life insurance, or savings. Making a Will is the only way to ensure that the people you love and the causes closest to your heart benefit from your estate as you want them to.
- Is a gift to The Forward Trust subject to inheritance tax? If you choose to leave a gift to charity, this is taken out of your estate before your liability for inheritance tax is calculated. Leaving a gift to charity is actually tax effective as it can be a useful way of bringing your estate under the inheritance tax threshold.
- Should I tell you if I include The Forward Trust in my will? We understand your Will is private. It is your choice as to whether you choose to tell us that you left a gift to support our work. However, if you do let us know, then we can do more to show you what your gift could achieve.



Get in touch

Want to ask a question or let us know you've included The Forward Trust in your Will? Contact us on the details below;

E-mail: fundraising@forwardtrust.org.uk

Phone: 020 3981 5525

Post: Fundraising team, The Forward Trust, Unit 106, Edinburgh House, 170 Kennington Lane, London SE11 5DP



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