

# ADVICE FOR EXECUTORS

The prospect of taking care of a loved one's estate can be daunting but, with the right information and a bit of preparation, you will be able to carry out your family member or friend's last wishes correctly and in keeping with the law and regulations.

If you are the executor of a will in which Help for Heroes has been mentioned, we hope you'll find this information helpful when dealing with the estate.

## What to do if we have been left a gift

We know from personal experience that being an executor isn't easy but please rest assured that your hard work, patience and help are greatly appreciated.

Our Legacy Case Manager, Zena, is experienced in estate administration, so we can offer you guidance on the responsibilities of an executor in estates where charities are named as beneficiaries. We can't give you legal advice but we explain what you need to know, signpost you to information and help you to avoid some of the more common pitfalls.

We're always happy to help so please do get in touch if you have any questions or concerns. You can call [Zena Hitchings on 01725 514103](tel:01725514103) or email [Legacies@helpforheroes.org.uk](mailto:Legacies@helpforheroes.org.uk)

## Has Help for Heroes been left a cash gift?

If the deceased has left us a fixed sum of money (also known as a pecuniary legacy), the process is quite simple. All you need to do is send a cheque for the correct amount payable to Help for Heroes, with a covering letter detailing the deceased's name and address and any other information that you may consider helpful.

Please address your letter to: [Zena Hitchings, Legacy Case Manager, Help for Heroes, Unit 14 Parker's Close, Downton Business Centre, Salisbury, SP5 3RB.](#)

## Have we been left a share or percentage of the estate?

If Help for Heroes has been left a share of the estate (also known as a residuary legacy) we're required by the Charity Commission and our auditors to ask for certain information to show we have received what our benefactor intended us to – no more and no less.

When you're ready to apply for Probate - or earlier, if possible – please send us with a copy of the Will and a list of the estate's assets and liabilities. As a charity we have a different tax status to some beneficiaries, so some assets may need to be treated in a particular way.

The sooner we can advise you of this, the better.

We welcome interim distributions when possible and regular progress reports during the administration are always helpful. If you experience any difficulties or delays, as is often the case, please get in touch with us as we may be able to help.

Before we can give you a proper receipt, we'll need the following information to meet our legal and auditing responsibilities, as mentioned above:

- a photocopy of the will and any codicils made by the deceased
- a schedule of the assets and liabilities of the estate
- a copy of the estate agents' sales particulars (where a property has been sold)
- a copy of an independent valuation for any significant assets
- estate accounts (preferably prior to distribution)
- a tax deduction certificate, form R185 (estate income)

Once you are ready to distribute the estate, you can send a cheque payable to Help for Heroes to: **Zena Hitchings, Legacy Case Manager, Help for Heroes, Unit 14 Parker's Close, Downton Business Centre, Salisbury, SP5 3RB.**

If you would prefer to transfer the money by BACS, please call **Zena on 01725 514103** or email her at [Legacies@helpforheroes.org.uk](mailto:Legacies@helpforheroes.org.uk)

### **How will my loved one's gift be honoured?**

We work hard to make every gift help as many people as possible and our supporters have told us that's the way they'd like things to stay, so we're sorry but we can't arrange physical memorials for those who kindly remember us in their Will.

We sincerely appreciate, respect and value every single supporter who leaves us a legacy. Many of these friends have lived prudently their whole lives so, in their honour, we make sure their last and most special gift is used wisely and helps as many people as possible.

The men and women who remember Help for Heroes in their Wills are a small but very special group of friends. We are forever indebted to them.