

## FitzRoy Family Factsheet: Looking after the future

The questions most frequently asked by FitzRoy families are:

**“How do I protect my child in the future?”**  
**“How do I leave a gift to FitzRoy in my Will?”**

This factsheet gives you some basic information on the most common options. The details of any arrangements should then be discussed with your Solicitor because every situation is different.

To make sure that all your child's needs are met in the future, you can set up a **Discretionary Trust**. This can cover all your children, and will not affect the care package of your son or daughter who is supported by FitzRoy. You choose the Trustees (friends or relatives that you know well) and they administer the Trust when you are no longer around. The Trustees can authorise payments for specific needs, such as a new wheelchair or hoist, a holiday break, therapies or specialist furniture, ensuring that all future needs are met. If there are no surviving beneficiaries, the Trust can be wound up and any monies left to FitzRoy. Every detail is included in the Trust guidelines which you, as the person creating the Trust, determine.

**Legacy gifts** are an important source of revenue to FitzRoy and have enabled us to fund new care homes and to start brand new services around the country, helping us to transform even more lives for people with learning disabilities.

You can either leave a **residual** gift (a percentage of your outstanding Estate) or a **pecuniary** gift (a set amount). To add to an **existing Will**, complete a **Codicil** form and get it signed, in the presence of two independent witnesses who will not benefit from your Will or are a spouse of a beneficiary.

### Did you know?

- Over 65% of people die without making a Will
- Many Wills are wrongly written
- Leaving a gift to charity is tax free and reduces Inheritance Tax

### Join the conversation

