

Asset Checklist

Our checklist will help you to work out just how much your assets are worth.

ASSETS	£
House (present value)	<input type="text"/>
Bank and building society accounts	<input type="text"/>
Car	<input type="text"/>
Stocks and shares	<input type="text"/>
Insurance policies	<input type="text"/>
Pension benefits	<input type="text"/>
Other savings	<input type="text"/>
Household goods	<input type="text"/>
Furniture	<input type="text"/>
Jewellery	<input type="text"/>
Other items of value	<input type="text"/>
Total assets	<input type="text"/>

LIABILITIES	£
Outstanding mortgage	<input type="text"/>
Any bank loans/credit card debts	<input type="text"/>
Other debts	<input type="text"/>
Any taxes due	<input type="text"/>
Total Liabilities	<input type="text"/>

Balance

Inheritance Tax

Inheritance Tax (IHT) is a tax that is charged on the portion of your estate that exceeds a certain level at the time of your death, this currently stands at 40%. A gift to charity in your Will could reduce your liability. The current IHT threshold (as of June 2011) is £325,000.



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 Registered Office: The Geoffrey Udall Centre, Beech Hill, Reading, RG7 2AT.
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 A company limited by guarantee in England and Wales.
 Registered company (no. 1415700).



Your gift to us
 is a gift to them
 a guide to including Thrive in your Will



Who are we?

Thrive is the leading Charity in the UK using gardening to bring about positive changes in the lives of people living with disabilities or ill health, or who are isolated, disadvantaged or vulnerable.



This approach is called social and therapeutic horticulture (STH), where therapists work with plants and people to improve an individual's physical and psychological health, communication and thinking skills. The garden is used as a safe and secure environment.

The horticultural therapist will focus on each individual that comes to Thrive, building a set of activities aimed at improving their particular health needs. It's this tailored approach that makes Thrive the leader field of STH.

Mark had led a busy and active life before his stroke. Since then his life has changed, he has been left with limited mobility and a weakness on his left side and as a result he uses a wheelchair for most of the day.

Gardening with Thrive offers Mark the opportunity to be active, exercising both body and mind by taking part in purposeful activity – he still misses his job which he lost after his stroke.

Thrive has helped Mark to be more confident, focusing on what he can do, not what he cant.

You too can help us by leaving a gift to Thrive in your Will. A gift in your Will means that we carry on supporting those who need us in the future.



I still wish I could be as active as I was before the stroke, but coming to Thrive and being able to do things makes me feel better.



How do I make a Will?

Making a Will is the only way to ensure that the people and causes you care about are looked after in the way that you wish. If you do not have a valid Will, your loved ones may be left to sort out legal and financial difficulties.

Making a Will is simple. Before you visit a solicitor it is important to make a list of your assets (what you own) and liabilities (what you owe), so you can work out what your estate is worth. Our simple checklist in this information sheet can help you do this.

What kind of gift can I leave to Thrive?

A Will is a legal document and we recommend having your Will drafted by a solicitor to ensure your wishes are carried out.

There are three ways in which you can remember Thrive after your loved ones are taken care of in your Will.

1. A Pecuniary Gift

A pecuniary gift is a specific amount of money.

2. A Residuary Gift

A Residuary gift is commonly left as a percentage and is the remainder of your estate after payments of taxes, expenses and legacy bequests.

3. A Specific Gift

A specific gift is a gift of a particular item or items. Such gifts could be share in the contents of a bank or building society account, or personal items such as jewellery, paintings or furniture. Whatever you leave to a charity will be cherished and appreciated.



For those relying on the services and support of Thrive, **your** legacy gives them a future.