



St Hugh's College, Oxford

WHAT IS A LETTER OF WISHES?

A Letter of Wishes is an informal letter, signed and dated by you and addressed to your Executors that you can write or type yourself. Unlike a will, the Letter of Wishes does not become a publicly available document on death and therefore should be kept with your will. It does not require witness signatures.

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 is commonly used for things such as:

- Listing your main assets, including bank accounts, life insurance policies, valuable items, and their location.
- Helping your Executors identify specific items or assets you are gifting in your will and to whom, such as sentimental items, gifts to charities, etc. This can include attaching photos or descriptions.
- Special instructions on your funeral arrangements and ceremony. (You should also discuss these 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.

SAMPLE WORDING FOR A LETTER OF WISHES

To My Executors, My Family and My Beneficiaries and Any Other Person Whom It May Concern:

I, (name), of (address), wish to state my wishes with respect to my gifts to charity. I appreciate that this letter imposes no legal obligation upon you but it expresses my wishes to which I hope you will have due regard.

In my will, I have made provision for a (you may wish to include details of the gift here) gift to St Hugh's College, St Margaret's Road, Oxford OX2 6LE for its general charitable purposes.

I request that my gift be directed to (purpose: where it is needed most, endowment, or a specific fund), after the deduction of its standard administrative charges, in accordance with my wishes detailed below.

I would prefer that the gift not be used to support (detail any exclusion to the fund).

This Letter of Wishes does not change or revoke my will.

Signed _____
(Name of Legator)

Dated _____