



# Your Guide to: Leaving a Gift in Your Will



**How your kindness today can change lives  
for years to come.**

Registered charity number: 235434

Registered address: X Centre, Commercial Road Exeter, Devon, EX2 4AD



## Change lives beyond your lifetime

At Step One, we believe everyone deserves the chance to feel safe, supported, and empowered to fulfil their potential.

For over 85 years, we've walked alongside people facing challenges with their mental health, learning disabilities, and neurodiversity, offering understanding, guidance, and practical help to build brighter futures.

By leaving a gift in your will, you can make sure this vital support never stops. Your legacy could help someone take their first step toward recovery, feel heard for the first time, or rediscover hope in the midst of despair.

**This guide explains everything you need to know about leaving a gift to Step One Charity in your will so your compassion can continue to make a difference for generations to come.**



“I definitely would not be where I am today if it wasn't for the team at Cypress. Honestly, they are a cracking bunch and I am so grateful to them for helping me.”



# Who we are

As a unique provider in the region, we offer a comprehensive range of mental health support services. Our holistic approach considers the whole person, addressing the wider factors that affect wellbeing, independence, and community life.

## Our services include:

**Cypress Hospital:** Specialist inpatient rehabilitation for people with complex mental health recovery needs.

**Supported living housing:** Safe, supportive homes where people with mental health concerns and/or autism spectrum conditions can live more independently.

**Community enabling support:** One-to-one, tailored support to build confidence, skills, and independence.

**BeWell@StepOne:** Free in-person and online courses, workshops, peer support groups and activities.


**Wellbeing@Work:** Mental health training for workplaces; profits are reinvested into our services.

**Devon Mental Health Alliance:** Working in partnership with other charities to deliver community-based recovery support across Devon.

**Motivated by seeing people progress, Step One makes a real difference in the lives of more than 1,000 individuals each year. Every day, we see and hear the difference we make to these lives.**





A woman with shoulder-length brown hair and bangs is standing outdoors in a garden. She is wearing a grey cardigan over a blue and white patterned dress, black tights, and black boots. She is holding a silver walking stick in her right hand. The background features a stone wall, green foliage, and several potted plants on a wooden bench. A quote is overlaid at the bottom of the image.

“I always say that BeWell saved my life really. Because if it wasn’t for going with Step One to the H.O.P.E course and then coming here [wellbeing craft group], I’d probably still be sat in my flat, hating the world.”



# How will leaving a gift help?

Mental health challenges can touch any life, at any time. For some, it's a short-term crisis. For others, it's a lifelong journey. With the right support, recovery and renewed hope are possible.

## Your gift could:

- Help someone in crisis find immediate, compassionate support
- Provide safe spaces where people can talk openly without judgement
- Fund recovery programmes that build confidence, skills, and independence
- Support long-term sustainability so our work continues long into the future

**Even a small gift can create lasting change. Every year, gifts left in wills make a real impact on the services we provide for people living with disabilities and mental health challenges in Devon.**



# A powerful way to make a lasting difference

Making or updating your will provides peace of mind, ensuring your loved ones are cared for and your wishes respected. Leaving a gift to charity may also reduce inheritance tax.

After remembering those closest to them, many people decide to leave a gift in their will to a cause that matters to them. It's a meaningful and enduring way to support our mission and we are deeply grateful for these special gifts.

A gift in your will to Step One is one of the most valuable ways to transform lives. It may be the most significant single donation you ever make, creating an impact that might not be possible during your lifetime.

Remembering us in your will, means the values you hold during your lifetime will last long into the future.

Whatever its size, your thoughtful gift will make a positive difference. We'll use your gift wisely and it will bring us closer to our vision of a society that values mental health and wellbeing and where everyone can thrive in their local community.



**Above all, you'll be playing a part in creating a more compassionate world for future generations.**



“Step One has been the single most important service in tackling my difficulties. I believe that this is due to the authenticity of the support.”





# How to leave a gift



A thoughtful gift will help us to continue our vital work. At Step One, every gift, no matter what size, makes a real difference, giving hope and supporting others to live an independent and fulfilled life.

Making a will can mean peace of mind for the future. It can protect your loved ones, ensuring they are not subjected to additional worry at a time of grief. Leaving a gift to a charity in your will can also help avoid inheritance tax while making a real difference at the same time.

Leaving a gift is simpler than many people think. Here are the main options.

## **A share of your estate (residuary gift).**

After looking after loved ones, you can leave a percentage of what remains. This ensures your gift grows in line with your estate.

## **A fixed sum of money (pecuniary gift)**

A set amount that you decide in advance. It can be any amount, for example £500, £5,000 or £50,000. Your solicitor can arrange for it to be index linked, so it keeps its value over the years.

## **A specific item**

This could be anything from a car, house or piece of jewellery, to stocks and shares or the proceeds of a bank account.



# How to include Step One in your will

Including Step One in your will is straightforward.

1. Decide what type of gift you'd like to leave.
2. Speak to a solicitor to add the gift to your will or update your existing one.
3. Use our official details to ensure your gift reaches us:

Charity Name: Step One Charity

Registered Charity Number: 235434

Registered Address: X Centre, Commercial Road, Exeter EX2 4AD

If you already have a will, your solicitor can add a short codicil, which is a legal note to include your gift without rewriting the whole document.

Family and friends are always going to come first and we completely understand that. If you choose to support the future of Step One Charity with a gift in your will, you may wish to discuss your decision with those closest to you so that it doesn't come as a surprise to them.





# Your impact, your legacy

Leaving a gift to Step One Charity is a powerful statement of your commitment to mental health equity and compassion. Together, we can build a future where everyone has access to the support and care they need.

## Our promise to you

We promise to

- Use your gift wisely and where it's needed most.
- We'll always treat information you give us with respect and confidentiality.
- Honour your wishes and be transparent about how we use gifts.
- Always respect that family and friends come first.
- Acknowledge your generosity with gratitude, in private unless you choose otherwise.



“I found these sessions life changing, I really and honestly cannot recommend this highly enough. Thank you.”





# FAQs

## **What information about Step One Charity do I need to include in my will?**

You will need to include our registered name, address and charity number:

Charity Name: Step One Charity

Registered Charity Number: 235434

Registered Charity Address: X Centre, Commercial Road, Exeter EX2 4AD

## **Why is it important for me to write a will?**

Writing a will is the only way to guarantee that the people and causes close to your heart are looked after. You can also use your will to limit the amount of Inheritance Tax paid on your estate. If you don't write a will, surviving family members may encounter difficulties when administering your estate. It is even possible that your whole estate could be claimed by the Crown or the Government.

## **Can I add Step One Charity to my existing will?**

You can add a gift to Step One Charity in your existing will without making a new one through a 'codicil'. This is a simple way to add or alter the original provisions of your will. We recommend you take professional legal advice to do this.

## **Who can I talk to at Step One Charity about leaving a gift in my will?**

Our communications and fundraising team look after our legacy programme. You can contact them directly by calling 01392 255428 or email [legacies@steponecharity.co.uk](mailto:legacies@steponecharity.co.uk).

# Meet Sue

**Meet Sue, a supporter who has left a gift in her will.**

**“I’ve seen Step One go above and beyond for people in Devon, that’s why I chose to leave a gift in my will.”**



## Sue’s story

### **Why did you decide to leave a legacy to Step One?**

I’ve worked amongst Devon’s healthcare services for 33 years and over this entire period I’ve seen Step One go above and beyond to do its incredible work.


I’ve witnessed the real benefits this charity can offer to adults living with disabilities as well as to people experiencing mental health difficulties. That’s why, when I think of leaving a gift to charity in my will, I consider Step One.

### **What does leaving a legacy mean to you?**

What I love about the charity is that it works with people as individuals, seeing them for who they are and supporting them to achieve their own goals over the long-term, whether that be going to work or getting back on their feet after life has turned upside down.

In years to come when someone is in crisis, or faces seemingly insurmountable obstacles in their lives, I would like to help Step One be there to offer a lifeline and make a difference.





“Given me confidence and resources which are helpful in my daily life. I found my practitioner very accomadating and understanding. I felt like I was being listened to.”

Your kindness can live on.  
After you've cared for your loved  
ones, please consider leaving a gift to  
Step One Charity in your will.  
Together, we can ensure that support  
is always there for people when they  
need it most.



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