

Leaving a gift in your will



Supporting the banking
community past and present

Together, we can make a difference

We're the only charity in the UK dedicated to supporting past and present bank workers and their families.

Last year, we helped 5,876 people with advice, guidance and access to specialist support from our trusted partners. We awarded £1.23m in grants to those facing financial hardship and helped secure a further £1.4m through benefit claims and external funding.

Working with some of the UK's leading organisations, we support our community across every area of wellbeing – financial, physical, mental and social.

We've been doing this since 1883, helping thousands of people each year. With your support, we can make sure that help is there for generations to come.



"Thank you for making such a difference to my life. I can honestly say that what you've done to help me was beyond what I ever expected."

Areas we help with:



Mental health: access to specialist services, including counselling, to help you manage stress, anxiety or other mental health challenges



Financial support and grants: help with short-term living costs and longer-term expenses, such as disability aids or home adaptations



Disability and long-term conditions: practical support to help manage a disability or ongoing health condition, including access to specialist services



Relationships: guidance and counselling for individuals, couples and families – including support around separation or domestic abuse



Debt and money management: expert advice on managing debt, budgeting and benefits, and assistance with benefit applications



Caring responsibilities: financial, legal and practical support for carers and the people they look after



“We’ll forever be grateful for the support you’ve given us.”

Tim and Gale’s story

When Tim collapsed, his world shrank to the walls of his home.

Once fit, healthy and active, he suddenly needed help with almost everything. He’d suffered an aneurysm that affected his speech and mobility. Simple things like eating or having a bath had become daily challenges, and his wife, Gale, struggled to help him in and out of the car without risking injury. The couple felt trapped and isolated.

Between them, Gale and Tim had given 60 years of service to the banking industry. Unsure where else to turn, Gale called our Helpline.

Our adviser listened to her story and helped identify the next steps. Together, they applied for local authority support and disability benefits to cover the cost of carers. We also provided a grant for vital home adaptations – converting the bathroom into a wet room, installing a stair lift and providing a special car seat to make travel easier.

With these changes, Gale was able to return to work while Tim received specialised care at home. The couple regained their independence – and their confidence to look ahead again.

A gift in your will can help us to provide support in a number of ways:

Visiting Caseworkers

Our caseworkers support members of our community who are particularly vulnerable or need tailored, face-to-face help. They visit people in their homes to assess their needs, assist with benefit and local authority applications, and work with social care providers to make sure clients get the right support.

Client Advisers

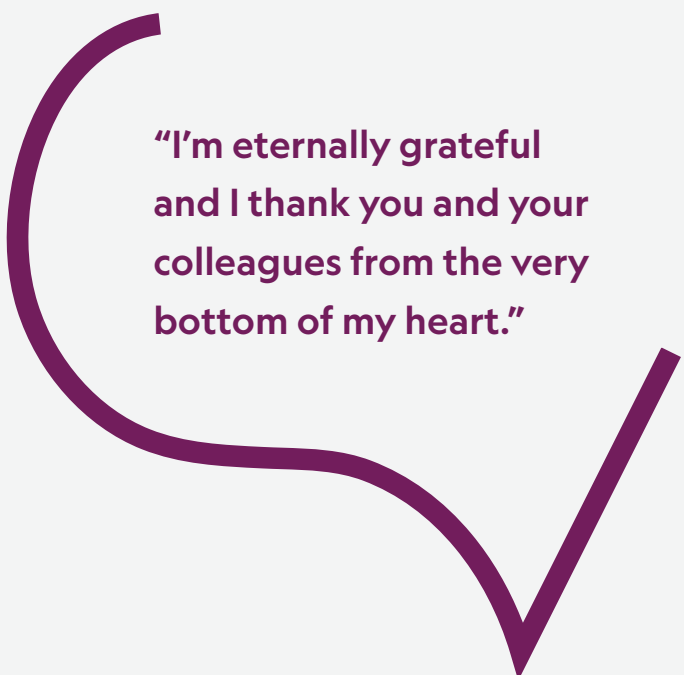
Our advisers offer confidential advice and guidance through our Helpline, LiveChat and email service. They listen, explore each person's situation and identify the most appropriate help – whether that's direct support from us or a referral to one of our expert partners.

Financial support

We provide grants to help with a wide range of needs – from sudden changes in circumstances to specialist equipment, mobility aids and home adaptations.

Digital support

Our website offers practical tools and resources to help people look after their wellbeing – whether that's mental, physical, financial or social.



**"I'm eternally grateful
and I thank you and your
colleagues from the very
bottom of my heart."**

Here's how we supported the banking community in 2024-25...



£1.23m

paid out in grants



5,876

clients supported



3,459

new clients



19,235

people who benefited
from our wellbeing
webinar series



£1.4m

extra funding
for clients

**With your help, we can continue to
support the health and wellbeing
of our community.**

Leave a legacy in your will

To include us in your will, simply give your solicitor or will writer the following details:

Charity name: Bank Workers Charity

Charity address: 35 Great St. Helens, London, EC3A 6AP

Charity Number: 313080 (England and Wales)

If you already have a will, you can change it at any time by using a codicil – a legal document that should be signed by you and witnessed by two people.

For more information on wills see: www.gov.uk/make-will

Write your will for free with us

We've partnered with estate planning experts Octopus Legacy to make writing your will simple – and free.

You can do it online, over the phone, by video call or in person – whatever suits you best. It's easier than you might think, and Octopus Legacy will guide you through the process step by step.

Write your will for free here: <https://octopuslegacy.com/online-will>

Our legacy promise

We believe in making a difference.

Your generosity will help us to support more people within the banking community and their families.

We care.

A gift from you will be handled sensitively and respectfully.

We're here.

If you have any questions about your legacy gift or how we support the banking community, you can always get in touch with us.



“I couldn’t speak more highly of the support I received from the Bank Workers Charity.”

Have any questions?

For further information about Bank Workers Charity please call Marie on 0203 148 6593 or email via legacy@bwcharity.org.uk



**REMEMBER US IN
YOUR WILL**
Help our work live on...



Registered with
**FUNDRAISING
REGULATOR**

Supporting the banking community past and present.

The Bank Workers Charity is the working name of the Bankers Benevolent Fund, a company limited by guarantee in England (No. 19366) and a charity registered in England (No. 313080). Registered office: 35 Great St. Helens, London, EC3A 6AP.