



BIRKENHEAD SCHOOL

Leaving a Legacy

You can help transform pupils' lives by leaving a legacy in your will to the Birkenhead School Foundation Trust. This can be achieved at comparatively little cost to your estate due to the benefits of tax relief that would be applied to any money you leave.

Legacies are vital to enabling the Foundation Trust to help pupils at Birkenhead School by providing financial support. This support is primarily delivered in the following ways:

Bursaries: These enable pupils to be educated at the School who would not otherwise have had the chance. Any legacy that you make, no matter the size, will help further that objective and enrich future pupils' lives.

General support: In addition to bursaries the Foundation Trust also provide general financial assistance to the School, helping fund particular projects or facilities.

Whilst we would prefer to have the freedom to manage your legacy in the most effective way for the benefit of the School, you have the freedom to direct how your legacy should be used if you wish.

Should you wish to leave a legacy we would strongly recommend you obtain independent legal advice and that you contact us so that we can discuss any wishes you may have. Please contact us at carol.keegan@birkenheadschoo.co.uk

If you are planning to leave a legacy to the Foundation Trust please let us know so that we can thank you and discuss how you would like us to use your gift in due course.

SUGGESTED WORDING

Should you wish to remember the financial support that the Birkenhead School Foundation Trust provides for the School in your will, you might wish to take the following wording suggestions to your solicitor. They will ensure that your wishes are accurately followed:

Residuary bequest

I give ___% of the residue of my real and personal estate which I can dispose of by Will in any manner I think proper to the Birkenhead School Foundation Trust (Registered Charity No.1068650) at Birkenhead School, The Lodge, 58 Beresford Road, Oxton, Wirral, CH43 2JD and the receipt of the Treasurer or Trustee shall be a complete discharge to my Executors.

Pecuniary bequest (a set sum)

I give the sum ofpounds to the Birkenhead School Foundation Trust (Registered Charity No. 1068650) at Birkenhead School, The Lodge, 58 Beresford Road, Oxtou, CH43 2JD and the receipt of the Treasurer or Trustee shall be a complete discharge to my Executors.

It is important to ensure that the following clause is inserted, whichever wording above that you use:

If at my death any charity named as a beneficiary in this Will or any Codicil hereto has changed its name or amalgamated with or transferred its assets to another body then my executors shall give effect to any gift made to such charity as if it had been made (in the first case) to the body in its changed name or (in the second place) to the body which results from such amalgamation or to which such transfer has been made.