



LEAVING A LEGACY

You can support the work of Caterham School by leaving a gift in your will. If you already have a will and wish to add a gift for the benefit of the School, you can do this by making a codicil to your will. In every case we recommend that you consult a solicitor when making or updating your will, to ensure that it is legally valid and reflects your intentions.

[CLICK HERE TO FIND A SOLICITOR
ON THE LAW SOCIETY WEBSITE](#)

CATERHAM SCHOOL CHARITY
NUMBER: **1109508**

Inheritance tax

As Caterham School has charitable status, your gift will be exempt from inheritance tax. Tax rules introduced by the government with effect from 6 April 2012 may also mean that if you leave at least 10% of your estate to charity, the inheritance tax rate on the rest of your estate may reduce from 40% to 36%. The rules are complex, however, and you should seek advice from your solicitor or tax advisor on how they may affect you.

Types of legacy gift

There are a number of options you might consider:

A residual bequest

This is a gift of the remainder (or proportion of the remainder) of your estate, after all payments, taxes and other bequests have been made. This option allows you to take care of friends and family first and still make a meaningful donation. We suggest the following wording:

I give ___% / all [please specify] of the residue of my estate to the Trustees of Caterham School (registered charity number 1109508) of Harestone Valley Road, Caterham, Surrey CR3 6YA, to hold on trust for its general charitable purposes.

A pecuniary bequest

This is a fixed sum of money decided by you. We suggest the following wording:

I give the sum of £_____ to the Trustees of Caterham School (registered charity number 1109508) of Harestone Valley Road, Caterham, Surrey CR3 6YA, to hold on trust for its general charitable purposes.

A specific bequest

You can also bequeath specific personal possessions such as property or shares. We suggest the following wording:

I give _____ [description of specific item] to the Trustees of Caterham School (registered charity number 1109508) of Harestone Valley Road, Caterham, Surrey CR3 6YA, to hold on trust for its general charitable purposes.

Further information

For more information please phone Emma Collings, Development Manager, on 01883 335111 or email: development@caterhamschool.co.uk