



CATERHAM  
SCHOOL

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# YOUR LEGACY TO FUTURE GENERATIONS

A guide to leaving a gift to  
Caterham School

Inspiring education for life

## Thank you for considering making a gift to Caterham School in your Will.

With the charitable support of our community, Caterham School has been helping children to reach their potential since 1811. Gifts in Wills make a huge difference. Large or small, these gifts combine to help us to deliver significant projects which otherwise could not happen.

### Transforming lives

Being able to provide open access to talented children regardless of their circumstance is a key objective for our school. In recent years, gifts in Wills have contributed to the School's Bursary Fund. This has allowed us to offer means-tested fee assistance to children from families with limited means. In doing so, we have been able to transform lives.

### Inspiring generations

Many of the buildings that were part of your daily life were made possible by Old Caterhamians and teachers remembering the School. Their names have become part of our fabric in classrooms, halls and buildings around our site. Gifts in Wills

play a crucial part in helping us to develop our academic, sports and co-curricular facilities. We are of course much more than the fabric of our buildings, but it is important to continue to look forward and in doing so to provide an inspiring learning environment that challenges our staff and pupils to be the very best they can be.

### Preserving our spaces

Recent gifts in Wills have also helped preserve our beautiful grounds and woodlands for future generations of pupils and everyone in Caterham to enjoy. In an increasingly congested part of Surrey, preserving the green spaces around our school has become a pressing need.



“Great indeed are our opportunities, great also is our responsibility.”

*William Wilberforce*  
Founding Benefactor, Caterham School

## The John Townsend Society

**We appreciate that making a Will is a sensitive and highly personal matter, but should you decide to leave a gift to the School, we would be delighted to know.**

This will give us the opportunity to thank you and show you how your gift will make a difference to future generations.

We have created a Legacy Society which is named after the School's founder, the Reverend John Townsend. Should you choose to let us know of your intention to leave a gift in your Will, we would be delighted to invite you to join this Society.

Members are invited to special events and, if they wish, are acknowledged on a plaque at the entrance to the School.

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



## What to do if you want to leave a gift in your Will

**To make a Will, or to update an existing Will, we recommend that you contact a solicitor or appropriately qualified Will-writing professional. If you need help finding a solicitor, The Law Society's online listings are one way to find a firm local to you.**

There are a number of different types of gift to consider. Your solicitor will be able to explain these and other examples in more detail, in the context of the plans for your broader estate:

### Pecuniary legacy

This is a gift of a specified sum of money. To preserve the value from inflation, we recommend that you ask your solicitor about tying the gift to the Retail Price Index.

### Specific bequest

The gift of an asset such as property or shares. Such an asset can be left to Caterham School for subsequent sale.

### Residuary gift

The residue of your estate is everything that remains after all the other gifts have been distributed and debts paid. You may want to leave all or a percentage of the residue to Caterham School.

### Reversionary legacy

This allows one beneficiary to use an asset during their lifetime, with the whole or a portion reverting to Caterham School on their death.

A gift in your Will which is unrestricted is always the most helpful, as it allows us to use your gift where there is greatest need at that time. However, if you are considering restricting your legacy gift to a particular area, please do contact us for further information. The following wording can be adapted by your solicitor to suit the type of gift you wish to leave.

*'I give, devise and bequeath to Caterham School, registered charity number 1109508 the sum of £X (X pounds) or the whole (or X share) of my residuary estate or [insert details of other gift] for its general purposes and I declare that the receipt of the Treasurer or a finance officer of Caterham School shall be a sufficient discharge therefore.'*

As a registered charity, a gift to Caterham School in your Will is tax free. If you think your estate might be liable to Inheritance Tax, you can ask your solicitor for further information about making a tax-effective Will. Tax rules may 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. Further guidance and useful information can be found on the following website: [www.gov.uk/donating-to-charity/leaving-gifts-to-charity-in-your-will](http://www.gov.uk/donating-to-charity/leaving-gifts-to-charity-in-your-will)

## Further information

Thank you for considering leaving a gift in your Will to Caterham School. If you would like to know more or if you have a query about anything in this booklet, please get in touch.

**For more information please phone Emma Collings, Development Manager, on 01883 335111 or email: [development@caterhamschool.co.uk](mailto:development@caterhamschool.co.uk)**

Our *Inspiring Education* campaign is making a transformational difference to young lives and the whole school community across three areas:

### inspiring education



UNLOCKING  
POTENTIAL  
WIDENING  
ACCESS



BUILDING  
A CAMPUS  
FOR OUR  
FUTURE



ENRICHING THE  
CURRICULUM  
WITH SPECIAL  
PROJECTS





**Caterham School**  
**Harestone Valley Road**  
**Caterham**  
**Surrey**  
**CR3 6YA**

**[caterhamschool.co.uk/support-us](https://caterhamschool.co.uk/support-us)**

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