



THE SIR THOMAS COOKES LEGACY SOCIETY

LEADING THE WAY FOR THE NEXT
GENERATION OF BROMSGROVIANS



There are powerful reasons why all those with a connection to Bromsgrove should remember the School in their will.

This is your opportunity to make a difference to the lives of generations to come and take your place among the School's most distinguished benefactors.



All those who have pledged a legacy to Bromsgrove in their will are invited to join The Sir Thomas Cookes Society, an association which is held in deep respect and affection by everyone at Bromsgrove.

Sir Thomas Cookes re-founded the School in 1693 and provided the financial endowment that would see the School begin to flourish on its current site.

Members of The Sir Thomas Cookes Society are invited to an annual lunch with the Headmaster and the Chair of the Foundation, and their names will be recorded on a plaque.



Bromsgrove School and its Foundation are registered charities, which means that bequests are deductible for estate tax purposes, subject to their country of residence.

UNITED KINGDOM

Legacy gifts to Bromsgrove are exempt from Inheritance Tax. The value of the legacy gift is deducted from the total value of the estate (money, possessions and property) before Inheritance Tax is worked out. Inheritance Tax is due if the estate, including any assets held in trust, is valued at over the current Inheritance Tax threshold. The latest information about Inheritance Tax can be found on the GOV.UK website.

Website: www.gov.uk/inheritance-tax/overview



USA

US Taxpayers can make tax effective bequests through the British Schools and Universities Foundation (BSUF). The BSUF has been determined by the U.S. Internal Revenue Service to qualify under Sections 501(c)(3) and 509(a) of the Internal Revenue Code as a tax-exempt public charity. Donors must request their preference for their bequest be used for the benefit of Bromsgrove School.

Website: www.bsuf.org/DonorInfo.html

EUROPEAN UNION

Certain EU Taxpayers can make tax effective bequests by making their legacy gift through Transnational Giving Europe (TGE). TGE is a partnership of leading foundations in fourteen countries that facilitates tax-efficient cross-border giving within Europe.

Website: www.transnationalgiving.eu/tge/



If you have already made a will, the simplest way to leave a legacy to Bromsgrove is by means of a codicil.

We strongly advise that you consult your legal advisor before drafting a new will or updating an existing one.

There are a number of different types of legacy:

A RESIDUARY LEGACY

This allows you to leave all or a percentage share of your estate after debts, other legacies and liabilities have been met. This has the advantage of automatically keeping up with inflation.

A MONETARY LEGACY

You can also choose to leave a sum of money, also known as a pecuniary legacy, which you can arrange to be increased in line with inflation.



A SPECIFIC LEGACY

This is the gift of something valuable like a property, a piece of jewellery or stocks and shares. The form of wording is the same as a pecuniary gift, except that the gift is specified instead of a cash sum.

A REVERSIONARY LEGACY

This enables dependents to be put first as beneficiaries of the will. They enjoy the assets during their lifetime then the legacy reverts to Bromsgrove upon their death. Your solicitor or legal advisor will be able to provide you with wording for this form of legacy.



The Next Steps... if you wish to inform us of your intended legacy in favour of Bromsgrove School, please complete the reply form opposite.

This will ensure that we record you as a member of the legacy society and invite you to future events.

Should you have any questions, please do not hesitate to contact us.

Bromsgrove School Foundation
Worcester Road
Bromsgrove
B61 7DU
+44 (0)1527 579679
foundation@bromsgrove-school.co.uk

CONFIDENTIAL REPLY FORM - LEGACIES (PART 1)

Please write your full name and home address, including postcode:

Title:

First Name:

Surname:

Address:

Telephone:

Email:

Years at School: Start -

End -

House:

Now please turn over and complete part two of this form.

Data Protection: Your data is held securely and maintained by the School and Foundation for administrative purposes only and will not be shared with any other parties.

Bromsgrove School Foundation is a company limited by guarantee and registered in England
Company No. 6084879. Registered Charity No. 1118435.

CONFIDENTIAL REPLY FORM - LEGACIES (PART 2)

Thank you for informing us of your intention to leave a legacy to Bromsgrove in your will. This is your opportunity to make a difference to the lives of generations to come and take your place among the School's most distinguished benefactors.

I would like my legacy to support:

- Scholarships and Bursaries
- Learning facilities/department/school
- A House
- Another area
- Please tick this box if you wish your legacy to be anonymous
- If you would like to inform us of the approximate value of your intended legacy, please use the space below

Please detach and return the completed form to:

**Bromsgrove School Foundation
Worcester Road
Bromsgrove
Worcestershire
B61 7DU
United Kingdom**

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Registered Charity Number 1118435

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