



INFORMATION ON LEAVING A LEGACY TO MALVERN ST JAMES

Some of our donors choose to leave a gift in their Will. We understand that decisions such as this are very personal, and that the interests of your dependants must always be considered first. However, we hope it is still possible for you to include Malvern St James in some form in your Will. It need not entail making a new Will; you can simply add a codicil to include Malvern St James (Charity No. 527513).

There are several types of legacy which you may wish to discuss with your legal adviser. Each of these has tax advantages for both you and the School, because all legacies are free of Inheritance Tax, as are gifts of shares and property. These include:

- a pecuniary legacy which specifies the precise amount;
- a residual legacy expressed as a proportion of your estate that remains after other bequests have been honoured;
- a reversionary legacy which passes to the School only after the death of those closest to you;
- a conditional legacy which names the School as the recipient of your estate, should your nominated heirs not survive you;
- alternatively you can leave money to the School in the form of Life Assurance, shares or property.

Your own solicitor will be able to advise you on the best way for you to make a bequest to Malvern St James.

If you feel able to let us know about your legacy, which would help greatly in planning, would you kindly complete the reverse of this Legacy Pledge Card.

Please send this form to
The Development Office, Malvern St James Girls' School,
15 Avenue Road, Malvern, Worcestershire WR14 3BA
Tel: 01684 892288 Email: meredf@malvernstjames.co.uk

Registered Charity No. 527513

Thank you

We recommend that you keep a copy of the completed form for your records.



Leaving a legacy is a private matter, although informing us of your intentions allows us to plan for the School's future.

If you decide to leave a gift to Malvern St James Girls' School in your Will or have done so already, it would be greatly appreciated if you would please complete and return this form to us. This information will be treated in the strictest confidence and does not involve you in any legally binding obligations. It is simply a statement of your present intentions.

Please tick the appropriate box:

- I have already included Malvern St James Girls' School in my Will
- I intend to include Malvern St James Girls' School in my Will
- I would like the Development Office to contact me about leaving a gift in my Will
- I would like my gift to go to
 - The Founders' Awards Bursary Fund
 - Unrestricted: to be allocated at the governors' discretion

Signed _____

Full Name _____

Address _____

Postcode _____ Country _____

Telephone number _____

Email address _____

Are you an Old Girl / Honorary Member / Former Parent / Current Parent / Other (please specify)

Is there any other information you would like to tell us about your gift?
