

Making a Gift in your Will to Monkton: Notification



If you decide to include a gift to Monkton in your Will, or have already done so, we would be so grateful if you could let us know. We want to ensure we understand your wishes and are able to use your bequest in the best way possible. We also want to thank you during your lifetime, and celebrate your generosity. Your intention will be treated in the strictest confidence. We acknowledge that it is simply a statement of your present intentions.

I intend to include/have included in my Will a legacy to Monkton Combe School.

Name

Affiliation to School (tick box as appropriate):

OM OC Parent (past/present)

Family/Personal Connection to Monkton Staff (past/present)

Governor (past/present) Other:

Address

Postcode

Telephone

Email

Type of Legacy:

Residual Pecuniary Specific Reversionary Conditional

It would be extremely helpful to the School if you could estimate the value of your proposed gift £

If you wish your legacy to be used for the benefit of a particular aspect or area of the School, please indicate this here. If you prefer your legacy to be used in one of our Bursary schemes please indicate this to us. If you do not specify a preference, your legacy will be used at the discretion of the Principal and Governors. Please ensure you have had a conversation with the School before making a specific bequest to ensure we are able to use your gift appropriately.



“ I loved my time at Monkton, I made friends for life and I found a faith. Academically my journey at the start was a failure, 5 attempts at O level English but I was taught to persevere and think outside the box at Monkton which has allowed me to achieve not only in my profession but also in a global context too. I wish to give back to the institution I value. I cannot take my earthly winnings with me so I am happy to pledge a gift to my old school.”
Professor Michael Keighley,
President of the 1868 Society



MONKTON

Thinks Differently

Making a Gift in your Will to Monkton

Please send the completed form in confidence to:

Becki Mckinlay, Director of External Relations
Monkton Combe School, Monkton Combe, Bath BA2 7HG

Tel: 01225 721201

Email: mckinlayb@monkton.org.uk

Thank you for your generosity



Making a Gift in your Will to Monkton

Monkton has always benefited from the loyalty and generosity of the people whose lives it has touched and transformed. The **1868 Society** has been established to acknowledge the support of individuals who have agreed to help the School by leaving a gift in their Will.

A legacy to Monkton is one of the most meaningful and enduring gifts you can give to Monkton. All legacies, whatever their size, will directly benefit the School, its pupils and its teaching staff. Pupils of today, as has been the case in the past, are the beneficiaries of previous generosity and now, over 150 years on in Monkton's history, it is our responsibility to ensure that the children and young people of tomorrow are equally provided for to ensure that Monkton retains its place as one of the leading Christian boarding schools in the country.

If you are considering or have left a gift to Monkton in your Will, please do contact us. We want to ensure we understand your wishes and are able to use your bequest in the best way possible. We also want to thank you during your lifetime, and celebrate your generosity.

We hope that the following information will be useful to you. Please do work with your Solicitor and Tax advisor, and don't hesitate to pick up the phone to share your ideas and views.

Thank you for thinking of Monkton at this important time, and we look forward to discussing your bequest in due course.

Further Information

Background

Monkton Combe School was founded in 1868. The Prep School was founded in 1888 and the Pre-Prep in 1929. Thousands of boys and girls have been educated at Monkton over the years. Some have become leaders in the Church, in business, in the military, in academia, the arts and media – in all walks of life. Whether leaders or not, all have been shaped by their formative years at Monkton and the Christian values and virtues that the School tries to instil. Monktonians have had an enormous influence on families, communities and societies at home and abroad. Leaving a legacy is a wonderful way to continue this impact and to give back in gratitude and appreciation.



What is the money used for?

The school sustains itself from school fees which cover all running costs, bursaries and minor improvements. However, major improvements are only possible with the generosity of donors. In addition, there is always the desire to extend our bursary support. Legacies will be used for these two main areas: new developments and bursaries.

Can I choose what my money goes towards?

The School encourages donors not to restrict their donations, since this gives greater flexibility to apply the funds to areas of greatest need or strategic importance. Funds will not go into general school funds; on receipt they will be allocated either to the current development project or campaign, or to various forms of bursary support. If you wish to make a bequest for a specific purpose, we encourage you to check with the school first.

The 1868 Society

The 1868 Society comprises all those who have included Monkton in their Will. You will be invited to an annual lunch hosted by the School as a way of thanking you and keeping you informed of developments. Please do let us know if you would like to be included in the Society.

How do I leave a gift in my Will?

It is best to speak to your solicitor when drawing up or making changes to your Will. Legacies can be arranged in the following ways:

- **Residual Legacy:** Normally a percentage of your taxable estate
- **Pecuniary Legacy:** A specific sum which could be index-linked
- **Specific Legacy:** Specific property, shares, works of art or objects
- **Reversionary Legacy:** Made payable after the death of another named person, such as your spouse.
- **Conditional Legacy:** Made payable after the conclusion of something else, such as the education of one's grandchildren.

