Confidential Pledge Form

I intend to include/ have included a legacy to Lady Manners School in my will.

|  |  |
| --- | --- |
| Name  |  |
| Address  |  |
|  |  |
|  |  |
| Postcode  |  | Email |  |

|  |  |
| --- | --- |
| Telephone  |  |
| Type (see over for definitions) and value of legacy (optional) |  |

This form should be returned to:

Janet Snell

Business Manager

Lady Manners School

Shutts Lane

Bakewell

Derbyshire

DE45 1JA

Alternatively, by email to: janet.snell@ladymanners.derbyshire.sch.uk

Types of Legacy

* A **Specific Legacy** is where a specific item, such as a piece of furniture or a painting, is left to the school. It is possible to leave gifts in the form of shares or even property. The school could then sell the asset and utilise the proceeds as the Trustees of the school think appropriate. This could be an attractive option where the asset has appreciated in value over the years and where a capital gains tax liability exists.
* A **Pecuniary Legacy** is where a specific sum of money is left to the school. You may wish to express your desire as to how that money should be used, for example as an endowed prize, or alternatively you may direct that the use of the money be at the discretion of the Trustees of the school.
* A **Residuary Legacy** is expressed as a percentage or fraction of your estate after all debts and other bequests have been settled. This type of legacy enables you to provide for your close relatives, dependents and friends and then divide the remaining part of your estate amongst your other chosen beneficiaries. Unlike a pecuniary legacy where the value of the gift can be eroded over time the residuary legacy is one way in which you can protect the relative worth of your gift.
* A **Reversionary Legacy (Life Interest)** allows you to leave items, money or your estate (or percentage of it) to Lady Manners School, however such items, money or your estate will be enjoyed by your spouse or chosen beneficiary during their lifetime at the end of which the bequest reverts to Lady Manners School.