



Egerton Society – FAQs

What is the Egerton Society?

All those who advise us of their intention to leave a gift to Bloxham School in their Will are invited to join the Egerton Society. Membership of the Society provides the School with an opportunity to thank legators for their gift, recognise their support and acknowledge the significance of philanthropy to the School. Members of The Egerton Society will receive, amongst other things, regular news updates, invitations to an annual Society lunch and selected School functions as the honoured guests of the Headmaster and Governors.

What do I need to do to become a member of the Society?

To receive an invitation to join the Egerton Society, all that is required is the completion of a Legacy Pledge Form outlining your intention to leave a gift to the School in your Will. This is a confidential document and is not legally binding. Advising us of your legacy, helps the School to plan for the future and allows us to thank you in your lifetime. The Legacy Pledge Form also advises the School how you would like your gift to be used.

Why leave a legacy to Bloxham?

Philanthropic gifts, particularly legacies, facilitate the growth and development of the School and help to facilitate transformational change. Central to the School's vision is that Bloxham should remain open to families from all backgrounds through the provision of means-tested bursaries. It is our goal to build a considerable endowment from which to fund a significant proportion of the School's fee remissions in future years. Leaving a legacy to Bloxham School not only acknowledge the part the School has played in your life, but also involves you in its future and the lives of future generations of Bloxhamists.

A legacy is a tax-efficient way to make a charitable gift of a size often not possible in one's lifetime and an opportunity to make a real and lasting impact.

In what way is a legacy tax-efficient?

Any gifts you make to a registered charity in your Will, are deducted from your estate before inheritance tax is calculated and can therefore reduce the tax liability on your estate. Bloxham School is a registered charity (Charity Number 1076484) and consequently all legacies made to the School are exempt from UK Inheritance Tax (IHT). Under current rules, if you leave 10% or more of your net estate to charity, the IHT rate on the whole of your taxable estate is reduced from 40% to 36%. The net value of your estate is the sum of all the assets after deducting any debts, liabilities, reliefs, exemptions and nil-rate band.

Where should I direct my legacy?

We encourage Egerton Society members to bequeath legacy gifts to The Bloxham School Endowment Fund where the capital will be invested and the income which arises on the invested capital will be used for accessibility, buildings and academic endeavour, with accessibility being the priority for this fund. Our goal is to build an endowment fund to provide the School with a sustainable and dependable funding stream on which it can rely. Legacy gifts to the Endowment Fund help to safeguard and grow the School's bursary provision, making it possible for more students to benefit in the future. It is a wonderful way too for Egerton Society members to leave an ongoing living legacy at Bloxham.

We recognise, however, that legacy gifts are highly personal and there are other options to consider if the endowment fund is not a preferred choice. If you are considering making a gift to Bloxham School in your Will, our Head of Development, Rachel Graves (r.graves@bloxhamschool.com), will be happy to discuss your wishes and intentions.