



The Egerton Society

Leaving a Legacy for the Future



The Egerton Society

Throughout its history, Bloxham has benefitted from the generosity of so many, and their legacies live on today. The Egerton Society exists to celebrate and recognise the support that members of the Bloxham community provide to the School by leaving gifts in their Wills.

We are deeply grateful to those who have left a gift, or plan to leave a legacy gift, to the School and they are invited to join The Egerton Society so that the School can ensure that the gift is recognised by all.

By leaving legacy gifts, members can help the School to thrive for many years to come and ensure that future generations of Bloxhamists can benefit from all that the School has to offer. Our primary goal is to build an endowment fund that will enable legacy gifts to provide a long-term source of funding, particularly for assistance with fees for pupils who need it. 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. Whatever option they choose, for many members leaving a legacy is a way to become involved in securing the future of the school they hold dear, a lasting gift that will benefit a whole community for generations to come. It can also be highly tax-efficient.

Egerton Society membership simply requires confirmation to the School (by completing the legacy pledge form) that you have included Bloxham in your Will. Beyond that, you will be invited to Society events, receive special communications from the School and, upon receipt of your gift, your name will be added to the Bloxham Book of Benefaction in the Egerton Library.

The Egerton Society provides a unique way for alumni and supporters of Bloxham to stay connected with the School and ensure that the spirit of Bloxham lives on from generation to generation.

Please read on and consider if you would like to join us.



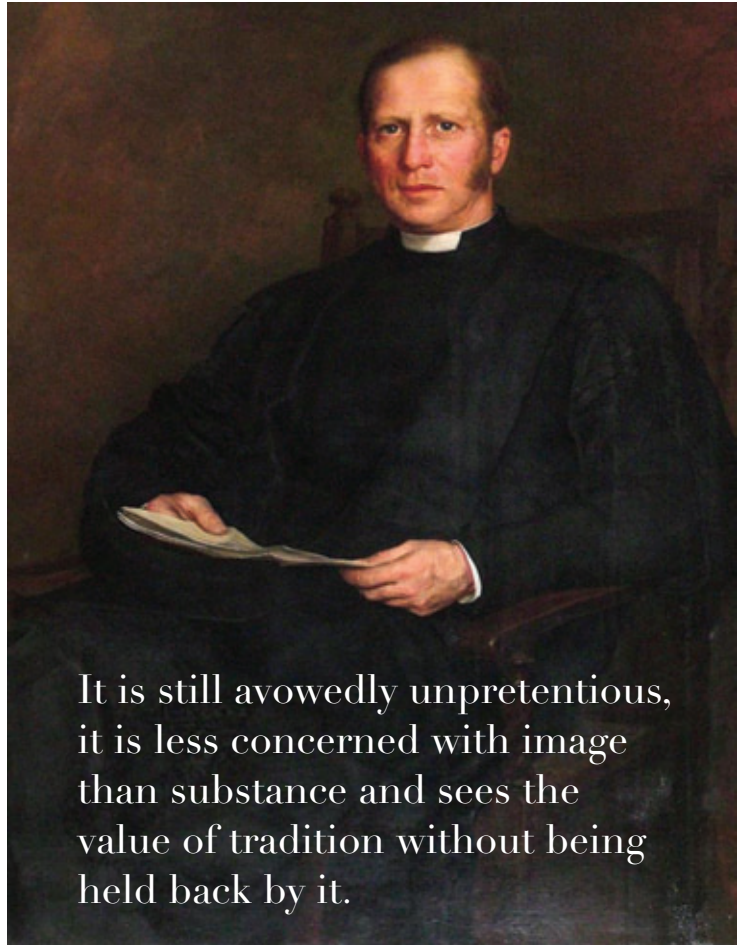
Paul Sanderson
Headmaster



A Bloxham Legacy

Much has changed since Philip Reginald Egerton opened the School in 1860, but in a number of important ways it has remained true to its roots. It is still avowedly unpretentious, it is less concerned with image than substance and sees the value of tradition without being held back by it.

It focuses on preparing pupils for the 'business of life' and in working with, and for, the benefit of others. These founding values and characteristics will, no doubt, help the School to thrive for generations to come. In 2010, on the 150th anniversary of the School's foundation, The Egerton Society was established to support Egerton's vision of providing an accessible and affordable education through legacy giving.



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VALUABLE
**SCHOOL, SCHOOL HOUSE,
BUILDINGS, AND LAND,
SITUATE AT BLOXHAM, OXON,
THREE MILES FROM THE TOWN OF BANBURY.**

To be Sold by Auction,
BY MR. JAMES HALL,
AT THE RED LION INN, BLOXHAM,
On WEDNESDAY, the 27th day of APRIL, 1859, at Three o'clock in the Afternoon,
By Order of the Assignees of the Reverend John William Hewitt, an Incumbent,
ALL THOSE NEW AND VERY SUBSTANTIALLY-BUILT PREMISES,
CALLED OR KNOWN BY THE NAME OF
ALL SAINTS SCHOOL,
Situate at Bloxham aforesaid, and fronting the Turnpike Road leading to Banbury. The School includes a Porter's Lodge, with Sitting Room and Sleeping Room; Dining Room, 33 feet by 15; Masters' Rooms, and Bed Rooms adjoining; Singing Room, 27 feet by 17 and 14 feet high; 2 Dormitories, 70 feet by 22 feet each, with Clothes Rooms, 22 feet by 9 feet adjoining; Washing Room, supplied with soft water, 21 feet by 16 feet; 3 Water Closets, fitted-up on the newest and best principle; and large Bed Room.

The above, which is in the Gothic style of Architecture, was built in 1855, in a substantial manner, with Native Stone and Bath Stone dressings. The walls, at the ground level, are 3 feet 4 inches in thickness.

ALSO,
A SUBSTANTIAL DWELLING HOUSE
Adjoining, lately occupied by the Head Master, with Entrance Hall; good Drawing and Dining Rooms; best Bed Room and Dressing Room; 3 other Bed Rooms; Servants' Room; 2 good Attics; 2 Kitchens, one fitted-up with a large Flavell's Range Copper and Furnace; Stone-arched Cellar; Water Closet and Pump.

Also, a DETACHED BUILDING, lately used as a SCHOOL ROOM, 60 feet by 19; also ANOTHER DETACHED BUILDING, used as a TEMPORARY CHAPEL, together with an UNFINISHED CHAPEL.

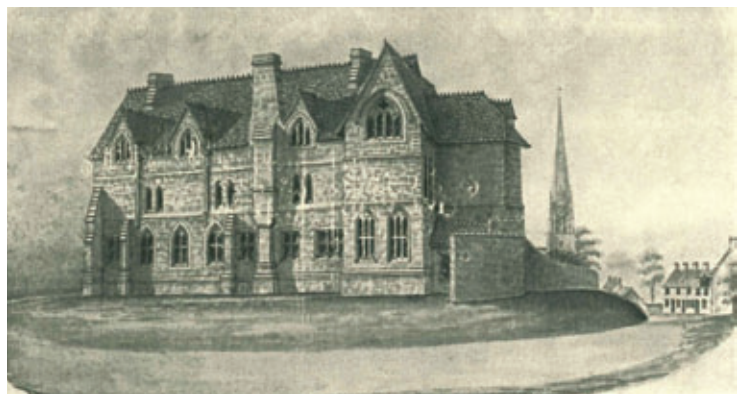
The above stands on over 3 Acres of Land, and was planted with choice Shrubs, by the late Proprietor, at an expense of nearly £200. It has a frontage to the Turnpike Road of 450 feet.

LOT 2.—ALL THAT PIECE OF LAND,
Adjoining the above Premises, on the North, and now Let in Garden Allotments.

**LOT 3.—ALL THOSE TWO SUBSTANTIALLY STONE-BUILT
COTTAGES**
Adjoining, having a frontage of 84 feet to the Main Street in Bloxham. Each Cottage contains 3 upstairs and 2 downstairs Rooms, with Pantry, Garden, and other conveniences complete.

All the above Premises are Copyhold of Inheritance of the Manors of Bloxham, Beauchamp, and Bloxham Finesse, in the County of Oxford, and are in every respect equal in value to Property of Freehold Tenure, there being no fines or heriots.

Lot 1 is subject to an Annual Quit Rent of 1s. 10d.; Lot 2, to 1s.; and Lot 3, to 3d.;



Bloxham Today

Bloxham today is a busy, diverse and happy place. It is polished but not pretentious; proud but unassuming. For over 160 years the School has delivered an outstanding education and today a Bloxham education is founded on five pillars which reflect Egerton's vision.

Bloxham pupils achieve great success in public examinations but also develop skills, experiences and values to succeed in their lives – however they define success. The School's goal is to develop confident, grounded young people, who work and communicate well with others, who have curious and creative minds, strong ethics, and the ambition to make the world a better place. Old Bloxhamists are living proof of this and, for a great many, their stories and achievements are a testament to their time at Bloxham.

“Pupils develop into happy, mature, confident individuals with a highly developed sense of responsibility for self and others.”

Independent Schools Inspectorate
(2017)

Five hallmarks of a Bloxham education

- 1 A Passion for Learning
- 2 A Balanced Curriculum
- 3 A Gold Standard of Pastoral Care
- 4 Development of Character
- 5 Christian Values



Bloxham Tomorrow – and the importance of accessibility

Social diversity and accessibility will remain vitally important parts of Bloxham's offering and community. The Headmaster and Governors are determined to ensure that a Bloxham education remains as accessible and affordable as possible to all those pupils who would benefit from it, regardless of financial circumstances. This means substantially increasing the amount of means-tested funding available.

Typically, about 30% of pupils receive some financial assistance and this equates to about 10% of our income. But this level of support is not enough. **Every year we receive many applications for means-tested assistance with fees that we are not able to accommodate; we simply do not have enough funds.** Demand is consistently greater than our ability to support and we expect that it will increase further in years to come.

The Governors therefore established the Bloxham School Endowment Funds to assist with this and to encourage philanthropic support in the form of gifts and legacies. Our goal is to raise many millions of pounds to ensure that means-tested support is available to as many deserving pupils as possible now and in the future. We hope that the Egerton Society will help us to do this.



“I was awarded the bursary following my father's diagnosis with cancer. The Bloxham house system provided a consistent, caring environment in an already turbulent time which could have been made much worse if I had had to move schools and start without the close friendships I had already made. It meant that I was supported throughout by my friends and provided with stability at a tough time. These school years provide such a crucial time in growing up and I do not think I would be the same person I am today if it were not for Bloxham.

Being able to stay at Bloxham also developed me personally. When I arrived at Bloxham I was disorganised and unfocused; by the time I left, I knew I was interested in pursuing a career in science and had both the academic and personal tools to do so.”

Rose Smith (Ry 13-17)

“Only when you leave Bloxham to go away to University or start working do you realise what an amazing place and environment it is for learning, playing sport and forming strong friendships. My bursary gave me the chance to be a part of this. Being chosen for a bursary was an incredible privilege and it gave me the opportunity to spend some of the most happy, well-balanced, and motivated years of my life at Bloxham. The combination of the highest level of both academic and sporting teaching on offer gave me the perfect platform to transition into life after school and particularly at University, so I owe a lot to the programme and the generous benefactors who enable it.”

Joe Cooper (Sy 05-10)





The Egerton Society

We would like to encourage members of the Bloxham community to help ensure that Bloxham continues to thrive in the future by leaving a gift to the School in their Will. Gifts of all sizes are most welcome, and options exist to help you determine how you would like your gift to be used.

We recognise that all circumstances are different and may change over time. All we ask is that our supporters leave a gift in their Will of a size and form that is right for them. Anyone who notifies the School that they have done this will be invited to join The Egerton Society – a society for all our legators.

When legacy gifts have been received, the name of the legator will be added to the Bloxham Book of Benefaction which will be kept in the Egerton Library so that future generations will be able to recognise, remember and hopefully be inspired by, the generosity of those who came before them.

Tax benefits

Legacy giving can be highly tax efficient. As a registered charity, under current legislation all gifts you leave to the School will be exempt from UK Inheritance Tax. In addition, by remembering the School in your Will, you may be able to reduce the taxable value of your remaining assets and the amount of Inheritance Tax on your estate. Please see the example provided in the enclosed forms. We recommend that you contact your accountant or solicitor about the most up to date information on the tax benefits of leaving a legacy gift to charity.

How will my gift be managed?

The Bloxham School Development Board is a small committee of senior staff, governors and donors that oversees all fundraising income and allocations on behalf of the Governors. They will also oversee the management of legacy gifts on behalf of the Governors, ensuring that funds are used as per the legator's wishes. The use of any 'unrestricted' legacy gift that is left to the School will be determined by the Governors on the advice of the Development Board.

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.



How could my gift support Bloxham?

Our priority is to build long-term funding to support accessibility, but a number of options exist for legacy gifts and are described here. It is important to make your wishes clear when writing your Will and guidance can be found in the enclosed forms.

Accessibility - The Gift of a Bloxham Education

For many pupils, a Bloxham education can be life-changing – transformational – and we want to ensure that more pupils can benefit from Bloxham, irrespective of financial background. This is the Egerton legacy and our priority for The Egerton Society. Legacy gifts to support bursaries and accessibility can provide:

- much needed funds to help pupils who would benefit from attending Bloxham and bring great qualities to the School, but whose families cannot afford the full fees;
- funds to provide bursary pupils with financial support above and beyond fees for essential items such as uniform, trips, additional lessons; and,
- assistance with School fees for current pupils whose family experience unexpected financial challenges through no fault of their own, thus ensuring that no child has to leave Bloxham due to an 'unfair blow' to their circumstances.

Buildings - A Gift to the Entire School

Legacy gifts may be used for the purposes of providing future buildings and facilities, or restoring historic School buildings, thus providing an enduring gift for many generations of Bloxhamists. Many Old Bloxhamists fondly remember buildings such as the Egerton Library, the Memorial Arch and the Dewey Sports Centre. All are wonderful examples of how gifts can contribute to the benefit of many thousands of pupils:

- First class facilities not only support exceptional teaching but also ensure that the School is competitive and attracts first class staff as well as bright, ambitious pupils; and,
- Historic buildings are the beating heart of the School and their long-term maintenance and ongoing upkeep help to maintain tradition and ensure that the Spirit of Bloxham thrives.

“From day one at Bloxham you make life-long friends and acquaintances; people who support you personally and professionally. Since 1945 many generations of my family have been fortunate to attend Bloxham and have benefited from a Bloxham education and the Bloxham community. By leaving a gift to the School in my Will, I hope that pupils of future generations, irrespective of financial means, will be able to have this wonderful experience. I encourage others to join The Egerton Society to support this great cause.”

Michael Deeley (Wn 52-56)

Academic Endeavour – A Gift to the Wider Community

Legacy gifts used to support academic endeavour will enable the School to maintain its first-class teaching and to introduce new subjects, teach new skills and deliver wide experiences. We must ensure that our curriculum develops and evolves to meet the needs of future Bloxhamists so that they, in turn, can maintain the Bloxham tradition of succeeding in the 'business of life' and working with, and for, the benefit of others.

What type of gift can I leave?

An Endowed Gift

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 from 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 reliable funding stream on which it can rely. It is also a wonderful way for Egerton Society members to leave an ongoing legacy to Bloxham.

More information about the Bloxham Endowment Funds can be found in the enclosed forms.

A Restricted Gift – Your Personal Gift

If you would prefer your bequest to be applied to a specific purpose rather than to the Bloxham School Endowment Fund, please contact the Development Office to discuss this before finalising the details, so that the wishes can be considered, discussed and agreed.

An Unrestricted Gift – The Most Flexible Gift

While the inclination to dedicate a gift to a specific purpose is understood, and while the Bloxham School Endowment Fund targets gifts towards the School's current key development goals, gifts which are made on an unconditional (unrestricted) basis are valued highly by the School as they provide flexibility to address the needs, as yet unknown, at the time of receipt.



Naming Rights

The names of all legators will be added to the Bloxham Book of Benefaction when the gift is received by the School. In addition, a range of named opportunities is available for the most substantial legacies.

A Gift In Your Lifetime

If you would like to make a gift to the School during your lifetime, so that you can see the benefits that it will provide, please contact the Development Office for a confidential conversation.

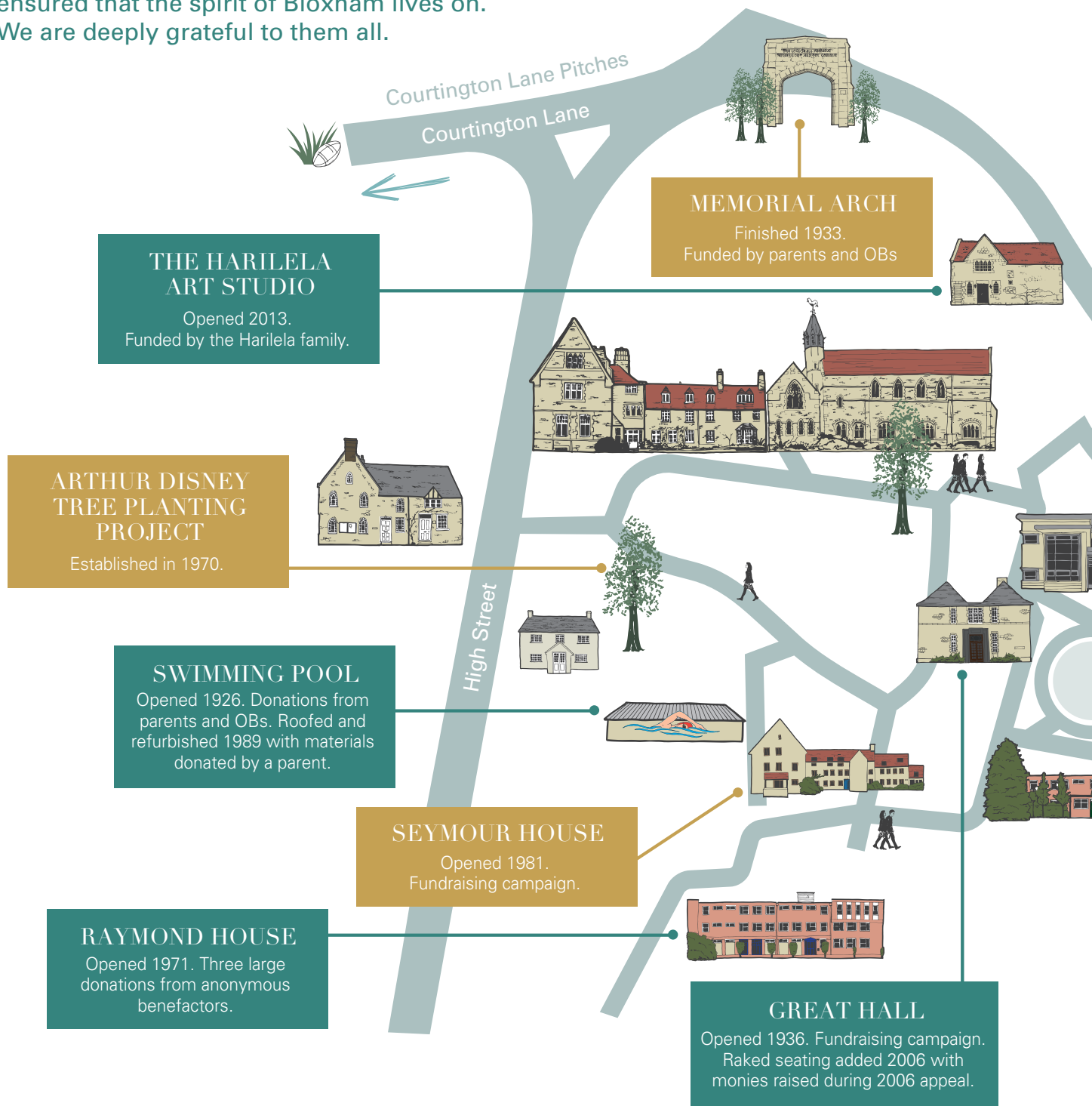


“Throughout my life I have really appreciated both the education and pastoral care I received from Bloxham - and the sacrifices my parents made to enable me to have a Bloxham education. I want as many young people as possible to benefit from a Bloxham education, which is why a significant proportion of my estate will come to Bloxham on the later of my and my wife's death.”

Miles Hedges (Cr 69-74)

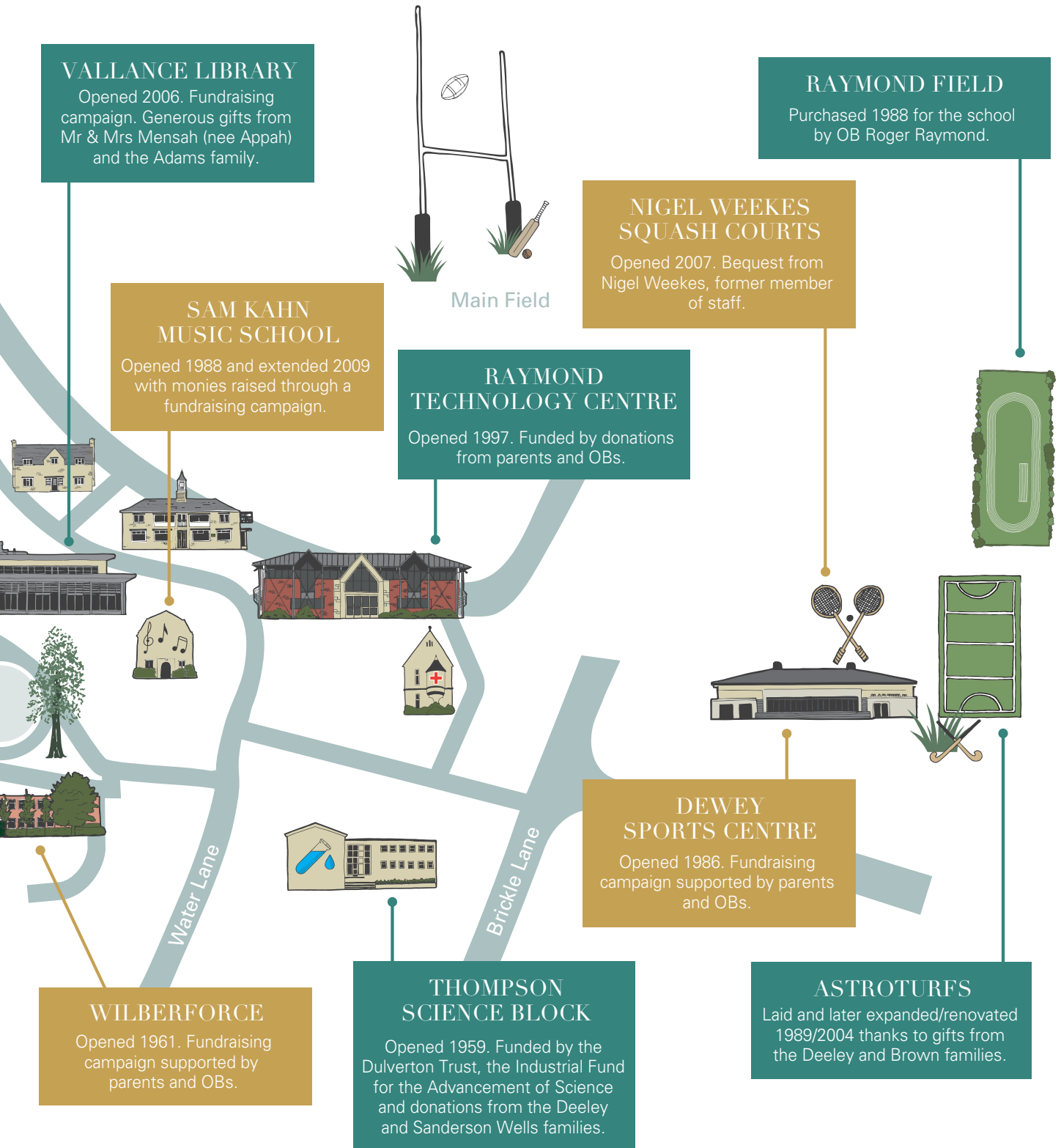
A History of Giving at Bloxham

Philanthropy has long been part of the Bloxham story. Our bursary and hardship funds, along with much of our campus owe a great deal to the generosity of our well-wishers. So much has been made possible by gifts from Old Bloxhamists, parents, grant-making trusts and others whose support has ensured that the spirit of Bloxham lives on. We are deeply grateful to them all.



The Power of Legacies

Legacy gifts have been particularly important to the School and can deliver transformational and long-lasting benefits. Significant six-figure gifts from Arthur Disney (Cr 43-45) and Mr and Mrs Pullinger are wonderful examples of this. Bloxham's beautiful grounds would be far poorer without its wonderful trees; the work of Arthur Disney's tree project over many years and now supported by a legacy of £100,000 from him. Henry and Jacqueline Pullinger both taught at Bloxham in the 1950s and 1960s and left the School a very generous unrestricted gift of over £250,000. Both are legacies that will provide ongoing benefit to the School and its pupils for many generations to come.



How to leave a legacy to Bloxham

What do I need to do?

There are a number of different ways to leave a gift to Bloxham in your Will. A specific amount of money, a percentage of your estate or a specific asset are all examples of such gifts. These are described in the enclosed forms, along with suggested wording to provide to your solicitor.

In most cases the process of including Bloxham in your Will should be simple and straightforward. We do, however, recognise that every estate is different, so we strongly recommend that you seek independent legal advice (including tax advice) before drawing up or making any changes to your Will.

How to join The Egerton Society

Please let us know about your gift to Bloxham by completing and returning the legacy pledge form enclosed with this brochure. This will enable us to fully understand your wishes and to seek clarification if required. We will then be able to thank you for your support by welcoming you as a member of The Egerton Society.

Contact details

Rachel Graves
Head of Development
The Development Office
Bloxham School
Bloxham
Oxfordshire OX15 4PE

Email: development@bloxhamschool.com
Tel: 01295 724386

Registered Charity No: 1076484

Thank you



Mr and Mrs H LI Pullinger, members of staff





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Leaving a Legacy for the Future



Bloxham School, Banbury Road, Bloxham, Oxfordshire OX15 4PE

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