



WILLIAM ELLIS SCHOOL
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Leave a legacy to the BIRKBECK AND WILLIAM ELLIS SCHOOLS TRUST to carry on the work of our founder, the 19th century educational visionary and philanthropist, William Ellis (charity number 1102334). William Ellis, valued the development of thinking, reason and preparing young people to be happy adults and responsible citizens. This holds true to this day.

Making a Will is the only way to ensure that your affairs are left in order and your family will be provided for after you're gone. It is also an opportunity to make a contribution to a cause you believe in.

There are two ways to leave a legacy to the **Birkbeck and William Ellis Schools Trust**. You can create a Will, including the details of your gift, or you can add a codicil to an existing Will. A codicil is a document which adds or makes a change to your existing Will without the need to rewrite it.

What your will should say (English Will)

If you have an English Will, we suggest that your Will or codicil should use the following wording according to whether you wish to leave a specific legacy or a percentage of your estate:

The Birkbeck and William Ellis Schools Trust is unable to provide any direct legal advice and recommend that all aspects of your Will should be discussed with a legal professional.

Specific Legacy

'I give to the Birkbeck and William Ellis Schools Trust (charity number 1102334) having its registered office at Fredericks Ltd, 106 Charter Avenue, Ilford, Essex 1G2 7AD the sum of _____. A receipt of any officer of the charity shall be a sufficient discharge.'

Percentage of your estate

'I leave to the Birkbeck and William Ellis Schools Trust (charity number 1102334) having its registered office at Fredericks Ltd, 106 Charter Avenue, Ilford, Essex 1G2 7AD ____% of the residue of my estate wherever situated. A receipt of any officer of the charity shall be a sufficient discharge.'

If you think your estate may be subject to UK inheritance tax and you leave a percentage of your estate to charity and a percentage to family members, the allocation of inheritance tax can become quite complex. We recommend that you take advice from a solicitor or a tax advisor in these circumstances.

Inheritance tax information

The Birkbeck and William Ellis Schools Trust is a registered charity (charity number 1102334) and all donations left to us are charitable for UK tax purposes and are therefore exempt from UK inheritance tax. Gifts made to charity in your Will can also reduce the overall amount of tax that will be payable on your estate. It is important to note that not everyone will have to pay Inheritance Tax. It is only due if your estate - including any assets held in trust and gifts made within seven years prior to death - is valued over £325,000. Inheritance Tax is payable on the amount above the threshold of £325,000 at a rate of 40%. However, if you leave a charitable legacy of at least 10% of your estate, then this rate is reduced to 36%.