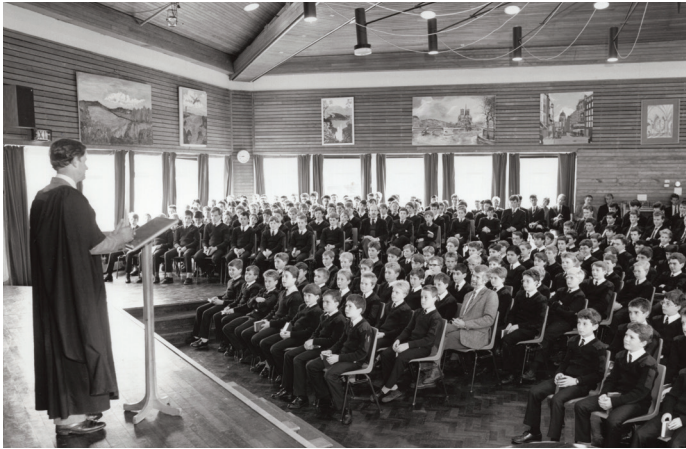




LORD
WANDSWORTH
COLLEGE



LEAVING A LEGACY



FROM THE HEADMASTER

Lord Wandsworth College has an extraordinary history that began, as you know, with the bequest of one generous and visionary man, Baron Sydney James Stern.

Educating Foundationers at LWC remains a guiding principle. Keeping College facilities up to date and delivering excellence in teaching and learning are also essential. As such, LWC continues an exciting period of development, focusing on enhancing both the welfare and education of all our pupils.

Legacy gifts play a crucial role. The College has been fortunate to be able to depend on the generosity of many people. In addition to a handful of large, transformational bequests, we usually receive legacies of all sizes from £500 to £100,000. All are extremely welcome and positively affect the lives of pupils at LWC through Foundation Awards, Sternians Trust Fund grants and improved teaching and learning facilities.

I appreciate there are many demands on your finances that may preclude you from making a gift right now. However, a legacy is an easy, tax-efficient way to leave a final tribute to your old school that will mean so much to those children who follow in your footsteps.

I thank you for considering leaving a gift in this way to safeguard LWC's future.



Adam Williams
Headmaster



"I would not be the person I am today if I hadn't been at LWC – I owe a huge debt of gratitude to the foresight of Sydney Stern and those that followed who made LWC the place it was in my day and is today."

WHY LEAVE A LEGACY

A legacy is a simple and flexible way to give a gift.

Understandably, making provision for our loved ones after we are gone is a priority. However, many Sternians and parents have also decided to set aside something for Lord Wandsworth College.

Leaving clear instructions will ensure the College uses your gift in the manner you intended and there are three distinct options...



FOUNDATIONERS


Registered Charity Number: 1143359-6

The Foundation remains at the heart of LWC today and supports around 50 Foundation pupils at any one time whose lives have been disrupted by the loss of one or both parents, through bereavement, separation or other circumstance. Some are in the care of relatives or living in unsuitable conditions. Others are coping with challenging home circumstances with a grieving parent struggling with daily routines. All benefit from the opportunity to thrive within our vibrant, supportive, boarding-school environment and reach their potential.

Since opening our doors, it has been our pleasure and privilege to welcome over 2,500 Foundationers into the College community both at the original Gosden House and at Long Sutton. Increasing philanthropic income now is vital to enable us to achieve our goal of ensuring our tradition of Foundationers is sustainable for future generations.

"...now I have as much of a future as anyone else, thanks to the LWC Foundation."

MILES MCDUFFUS, FOUNDATIONER & HEAD OF COLLEGE
SCHOOL 2010-2017



"...we cannot thank The Sternians Trust Fund enough for allowing our son to be able to continue this wonderful education..."

LORD WANDSWORTH COLLEGE

Registered Charity Number: 1143359

Your gift could be used to fund a variety of things at LWC e.g. for Capital Projects such as building refurbishments, new sports and music equipment or indeed for the education of Foundationers or other bursary pupils – whatever is deemed by the Governors to be the priority at the time. It is extremely useful to have unrestricted income in this way to provide the College the financial breathing space to afford key priorities.

THE STERNIANS TRUST FUND

Registered Charity Number: 1052004

The Fund aims to ensure that boys and girls do not have their education at LWC taken away from them through adversity. The Fund provides grants to families who are facing overwhelming difficulties that mean meeting the cost of the fees becomes impossible. Parents may have been taken ill, lost their jobs or business – all difficult and unforeseen events. The grants ensure the pupils can continue their education and keep the stabilising influence of the College during difficult times at home. This crucial support can make all the difference.

The Trust Fund is separate from the College and is run by a committee of trustees, most of whom are themselves Sternians. It works closely with LWC staff, and plays a crucial role in supporting pupils.

LEAVE A GIFT

Join us in leaving a gift
in your Will and become
a member of The 1912
Society for legacy pledgers.

Every member of The 1912 Society wants to give something back to the College. However, not all of us are in a position to do so during our lifetime.

Some of us are also concerned about other calls on our finances such as school/university fees, helping our children/grandchildren get onto the first rung of the housing ladder, possible healthcare costs as we get older etc.

Making provision in our Will is a great way to support the College in the future if we cannot commit to giving right now.



JOHN DUDLEY
SUTTON 1946-1951

I had lived in India almost from birth. When my father died, my mother and I had to leave suddenly and I came to England with little more than the clothes we had, contained in two trunks. This included a Meccano set, which was very precious to me. I came to the College when I was eleven years old. The Foundation gave me everything: a home, with all that was necessary; an education; an upbringing and the skills that eventually enabled me to have a good, fulfilling life.

With the financial resources I now enjoy, I would like to make it possible for someone else to benefit, as I did, from the generosity of the Lord Wandsworth Foundation. I have planned to leave a gift in my will to support future Foundationers.



ROBIN POPE
SCHOOL 1953-1961

Like so many children of the immediate post war years, I had experienced a somewhat rocky start to my life. It was an amazing stroke of luck that the Headmaster of my primary school persuaded my mother that Lord Wandsworth College could be just the ticket for me. After passing Brownó's assessment, I went on to benefit from the generosity of Sydney Stern's Foundation for which I will always be grateful.

I left LWC in far better shape than when I arrived! I had been provided with a platform of qualities which enabled me to enjoy a happy and successful life in matters of family and of work.

*"I am eternally in debt to the Foundation and as such
intend to leave a gift in my Will."*

ROBIN POPE



ASHLEY BLOWS

SUMMERFIELD 1977-1984

I have very fond memories of my time at Lord Wandsworth College. My family was fortunate that as I moved to Summerfield my brother, Simon, took my place at Junior House.

Throughout my time at Long Sutton, I particularly loved sports and played for all the teams in the main sports up to the 1st XV/XI. I was privileged to be a College Prefect. I went on to the University of Sheffield and have been working in the banking sector in the City of London ever since. I still have a love of sport and continue to play cricket and coach a local Under 13 team.

I am leaving a gift in my Will as I am highly appreciative of the benefits of the education I received and the experiences I enjoyed.

"I owe LWC everything, so leaving the Foundation money in my Will is the least I can do to say 'thank you'."

SIR PETER COULSON



SIR PETER COULSON

SUTTON 1971-1976

LWC encouraged me to do the things I was good at, thereby giving me a self-confidence and a positive outlook on life which has never left me. John Merriman encouraged a love of drama and literature which means that, even now, I still read a new book every fortnight. Tony Woolstone taught me law and then encouraged me to become a barrister. And Tony Whibley saddled me with a passion for cricket (at which I was and remain hopeless).

But, best of all were the friends I made then; the friends to whom I still turn first in times of joy or crisis. Most were, like me, Foundationers. They have done well in the world's terms but, much more importantly, they are unchanged from the days when they wandered around the CCF camp in Folkestone dismally failing to look like soldiers, or tried to devise clever ways of getting out of the Big Cross Country.



THE 1912 SOCIETY

Keeping The College Informed

If you are comfortable doing so, please let us know if you intend leaving the College a gift in your Will. By telling us, you will become a member of the 1912 Society. Informing us of your intentions does not bind you in any way and you do not need to let us know the size of any potential gift unless you wish to do so.

There is a form at the back of this booklet you can complete. However, if you would like to discuss things further do contact the Philanthropy Office. Rest assured your response and any subsequent correspondence or discussion will be treated in the strictest confidence.

As a member of the 1912 Society you will be invited to an exclusive annual activity as well as receive invitations to other College events throughout the year.

We will also keep you up to date with appropriate news and show you the impact donations have on the education of pupils at LWC.

The Society offers a great way to keep in touch with like minded people and most importantly, gives us the opportunity to thank you for your generosity and forethought.

Current members enjoy being part of this group, knowing that they are all planning to help support the College in the future. They are a lively bunch and there is always plenty of fun when we meet up.



1912 SOCIETY



LEAVING A LEGACY

The most common methods for leaving a gift in your Will are as follows:

A PECUNIARY LEGACY

A gift of a specific sum of money. As the value of a specific sum decreases over time with inflation, this can be index-linked to maintain its current-day value.

A SPECIFIC BEQUEST

A gift of a specific asset e.g. a house, shares, or a piece of art/jewellery.

A RESIDUARY LEGACY

A gift of all, a percentage of, or a share of your estate after expenses, pecuniary and specific bequests. This type of gift cannot be eroded by inflation.

A REVERSIONARY LEGACY

Allows named persons to benefit from your assets until their death, at which time the remaining assets are transferred wholly or partly to the College.

A SUBSTITUTIONAL LEGACY

A gift of your estate to other persons which reverts to the College if they predecease you.



Altering an Existing Will

If you have already made a Will, but you want to leave a legacy to a charity you can make an addition or change it without re-writing your current Will. This addition is called a codicil.

Lord Wandsworth College suggests that you seek advice from a solicitor before making or updating your will.



TAX-EFFICIENT GIVING

An up-to-date, professionally written Will is an incredibly important document. It is the only way to ensure your wishes are carried out in the way that you want them to be.

Inheritance tax will need to be paid at 40% on any part of your estate that is greater than the “tax free threshold” set by the government, currently £325,000 per person.

However, gifts in Wills to charities are deducted from your estate before the inheritance tax is calculated. Also, if you leave 10% or more of your chargeable net estate to charity, the inheritance tax rate drops to 36%.

Please speak to a solicitor or financial adviser for advice on your particular situation.



	Without Legacy	With <10% Legacy	With 10% Legacy
Total Estate	£500,000	£500,000	£500,000
Tax Free Threshold	£325,000	£325,000	£325,000
Net Estate	£175,000	£175,000	£175,000
Charitable Donation	£0	£10,000	£17,500
Taxable Estate	£175,000	£165,000	£157,500
Inheritance Tax	@40% £70,000	@40% £66,000	@36% £56,700
Estate available for Distribution	£430,000	£434,000	£443,300
		£424,000 plus £10,000 to charity	£425,800 plus £17,500 to charity

(all figures correct at September 2023)

“The Foundation gave me the education, opportunities and a start in life I could never have hoped for. I feel truly fortunate. Thank you.”

IMRAN SROYA, FOUNDATIONER
SUTTON 1985-1992



LORD
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COLLEGE

01256 860297 | philanthropy@lordwandsworth.org | www.lordwandsworth.org/support-us

Long Sutton, Hook, Hampshire, RG29 1TB | Registered Charity No. 1143359

