

Birkenhead School Foundation Trust



**DONATION
FORM**

GIVING TO BIRKENHEAD SCHOOL

The School welcomes all gifts to the Foundation trust but, if you are considering giving, it may be worthwhile thinking about whether your gift can be made tax efficient.

Tax-Efficient Methods of Giving

Under current tax law, the Birkenhead School Foundation Trust is able to increase the size of many donations from the UK taxpayer at no extra cost to the giver, principally through Gift Aid.

Gift Aid

Since the Budget of March 2000, Gift Aid is now the predominant tax-efficient method of giving to charity in the UK. The system has been simplified. All the donor has to do is fill out the Gift Aid declaration (opposite) and decide on the preferred method of payment.

Banker's Orders vs. Cheque

Banker's Orders are perhaps the most advantageous to the Foundation Trust because they bring in regular amounts for which tax can be reclaimed annually. For example, a Banker's order of £100 per year over 4 years will yield to the Trust £512.82 (assuming a 22% basic rate of tax). This kind of gift is obviously particularly welcome as it reduces administration costs of soliciting donations on an annual basis and provides a guaranteed income, which means the trustees are able to plan ahead. If you wish to make a single contribution, Gift Aid can now be claimed on any size of donation. Please complete the Gift Aid and cheque declarations.

Legacies

Legacies made to the Birkenhead School Foundation Trust in a Will are exempt from Inheritance Tax. Please contact the Headmaster on 0151 651 3009, if you would like further information.

Matching Gifts

Many large companies run matching gift programmes, effectively doubling their employees' charitable contributions. If you think your company may run such a scheme and you would like help finding out how to take advantage of it, please contact the Headmaster on 0151 651 3009.

Gifts of Shares and Securities

From April 2000 individuals and companies have been able to get tax relief for gifts of listed shares and securities to charities when calculating their income or profit for tax purposes. The new tax relief will apply to disposals by individuals on or after 6th April 2000, or by companies on or after 1st April 2000.

Please complete the Gift Aid declaration (see guidance notes overleaf)

Donation Form

Please complete this form if you wish to make a donation to the Birkenhead School Foundation Trust. If you are a tax payer, please sign the declaration section too. This will enable the Foundation Trust to reclaim the basic tax you have already paid and it won't cost you a penny. If you pay tax at the higher rate, you will be able to reclaim tax relief yourself via your annual tax return.

Details of Donor

Title:

First Name(s):

Surname:

Address:

.....

Postcode:

Tax payers

I want Birkenhead School Foundation Trust (Charity No. 36833061) to treat all donations I make from the date of this declaration as Gift Aid donations, until I notify you otherwise.

Signed:

Date:

Please complete the Banker's Order **OR** Cheque Declaration

Banker's Order

To the Manager, Name of Bank:

The full address of your bank:

.....

Account Number: **Sort Code:**

Please pay from the above account to - National Westminster Bank plc, Birkenhead Charing Cross Branch, 6 Grange Road, Charing Cross, Birkenhead, CH41 4DF (sort code 60-05-07), account number 36833061

The sum of £ **and in words**

To be paid **monthly/quarterly/annually** for a period of **Years/ until further notice.** (please delete as appropriate). **The first payment to be made on...** **(day).....(month).....(year).**

Signed: **Date:**

Name (in CAPITALS):

Full Address:

..... **Postcode:**

Cheque Declaration

I enclose a cheque payable to the *Birkenhead School Foundation Trust* for £

Notes

If your declaration covers donations you may make in future:

1. If you change your name and address and the declaration is still in force, please notify the School.
2. You may cancel the declaration at any time by writing to the School – the declaration will not then apply to donations you make on or after the date of cancellation, or such later date as you specify.
3. You must pay an amount of income tax and/or capital gains tax at least equal to the tax that the Foundation Trust reclaims on your donations in the tax year. In other words, if you donate £15 to the Trust, we can reclaim an additional £3.75 from the Inland revenue, BUT you need to have paid at least £3.75 to the tax man first!
4. If your circumstances change in the future and you no longer pay tax on your income or capital gains equal to the tax the Trust reclaims on your gift, you can cancel your declaration. Simply inform the Trust c/o the School that your declaration is no longer valid.

You can ask your local tax office for leaflet IR113 Gift Aid which explains charitable giving in more detail or access the information online on the HM Revenue and Customs website www.hmrc.gov.uk.

How your contributions will be used

Since its inception in 1998 the Foundation Trust has supported students to the total value of £1,000,000 and there are currently c. 50 students in School receiving some support from the Foundation Trust. The Fund itself is managed by Rensberg Sheppards Investment Management Ltd in Liverpool. The Trustees include Governors of the School, the Headmaster, the Headmistress of the Prep and the Chairman of the Old Birkenian Society.

Gifts or bequests of more than £10,000, with the donor's or executor's permission, will be acknowledged on the Benefactors' Board in Bushell Hall. The Trustees wish to extend their warmest thanks to all benefactors and to stress the importance of the Fund now that the Government's Assisted Place Scheme has been completely phased out.

Please indicate by ticking the relevant box below how you would like to see your donation used:

Please ensure my entire donation goes to funding able and talented pupils

Please ensure my entire donation goes towards buildings and facilities

My donation is to be used at the discretion of the Trustees

Other (e.g. Music, Sports, Sixth Form) Please specify

Please return the form to:

**The Headmaster,
Birkenhead School,
Freepost LV6493,
Oxton,
Wirral
CH43 2JD**