



**BIRKENHEAD SCHOOL**  
**Foundation Trust**  
**Donation Form**

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## BIRKENHEAD SCHOOL FOUNDATION TRUST

Thank you for taking the time to read this brief document. For many decades, children from Birkenhead and Wirral have benefited from the outstanding all-round education available at Birkenhead School, with many of them going on to the best universities and, from there, taking up responsible positions in society. They were able to do this irrespective of social status or parental means during the era of “assisted places” which is now long gone.

There remains the opportunity for the School, thanks to generous benefactors, to support attendance for those who would otherwise find the fees prohibitive. Many give recognising the opportunities that opened up for them through attendance at Birkenhead School, some recognising financial assistance from which they benefitted and/or just keen to enable other children to have the best possible educational foundations and opportunities.

The School welcomes all gifts to the Foundation Trust, which will be used to provide support to those students who will benefit most from it.

### HOW CONTRIBUTIONS WILL BE USED

Since its inception in 1998, the Foundation Trust has supported students to a value in excess of £1,000,000 and there are currently around 90 students in School receiving some support from the Foundation Trust. The majority of the fund is managed by Rathbone Investment Management. The Trustees include the Governors of the School, the Headmaster, the Head of Prep and a representative of The Old Birkonian Society.

All donations are gratefully received and will be put to good use. Gifts or bequests of £10,000 or more, 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 in enabling students to access the type of education offered by Birkenhead School.

By way of illustration, at the time of writing, if 30 donors were able to give £35 per month over the next 7 years, this would enable a full “Access Scholarship” for a ten year old to attend the School through to the end of the Sixth Form, setting them up for life.

In carrying out their duties, the Trustees will exercise due diligence in the way they invest and use donors’ money to the benefit of children at the School. You are invited to make a donation to general funds or to restricted funds which will be used for a specific purpose. Please indicate your preference below:

- My donation is to be used at the discretion of the Trustees (general fund)
- Please ensure my entire donation goes toward funding talented students (restricted fund)
- Please ensure my entire donation goes toward buildings and facilities (restricted fund)
- Please use my donation as indicated below (e.g. music, sports, Sixth Form):

## NOTES

### GIFT-AID

As you consider giving, it is worthwhile thinking about whether your gift can be made tax efficient. Under current tax law, the Birkenhead School Foundation Trust is able to increase the size of donations from UK taxpayers at no additional cost to the donor through the Gift Aid scheme.

Since 2000, Gift Aid has been the predominant tax-efficient method of giving to charity in the UK. Since its introduction, the system has been simplified and all a donor is required to do now is complete a Gift Aid declaration (available as part of this document). If you are a higher rate tax payer, you can claim further tax relief through your tax returns.

Please inform the School if you:

- Want to cancel the Gift Aid declaration
- Change your name or home address
- No Longer pay sufficient tax on your income and/or capital gains

(Further information on charitable giving and taxation can be found on the HMRC website, [www.hmrc.gov.uk](http://www.hmrc.gov.uk).)

### STANDING ORDER VERSUS CHEQUE / DIRECT PAYMENT

Standing Orders are perhaps the most advantageous to the Trust as they bring in regular income, which allows the Trust to both plan ahead and to streamline its administrative processes, thus reducing the cost of running the Trust.

If you wish to make a single contribution, Gift Aid can still be claimed (on any size of donation). Please complete the Gift Aid and cheque declarations (available as part of this document).

### LEGACIES

Legacies, made as part of a Will, can be made to the Birkenhead School Foundation Trust and are exempt from Inheritance Tax. Please contact the Bursar.

### MATCHING GIFTS

Many large companies run gift-matching programmes, effectively doubling their employees' charitable contributions. If you think your company may run such a scheme and would like help finding out how you can assist the Trust in this way, please contact the Bursar.

### SHARES AND SECURITIES

Individuals and companies may gift shares and securities to the Trust, and tax relief can be claimed when calculating their income and profit for tax purposes.

Please return this form to:

For more information, contact:

**The Headmaster,  
Birkenhead School  
The Lodge  
58 Beresford Road  
Wirral  
CH43 2JD**

**Carol Keegan**                      0151 651 3004  
**The Bursar, Mark Turner**      0151 652 4014

## 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 which will enable the Trust to reclaim basic tax you have already paid and it won't cost you any more than you have chosen to donate.

### DONOR DETAILS

Title	
First Name(s)	
Surname	
Address	
Postcode	

### Tax Payers' Declaration

*I want to Gift Aid my donation declared herein and any donations I make in the future or have made in the past 4 years to the Birkenhead School Foundation Trust (charity no. 1068650). I am a UK taxpayer and understand that, if I pay less Income Tax and/or Capital Gains Tax than the amount of Gift Aid claimed on all my donations in that tax year it is my responsibility to pay any difference.*

Signed	
Date	

### STANDING ORDER

I have set up an electronic standing order payment to the account below yes / no  
 (if yes, the remainder of this section does not need to be completed)

To the Manager of (name of bank)	
Address of bank	
Account Number	
Sort Code	

Please pay from the above account to:

**National Westminster Bank PLC, Birkenhead (Charing Cross) Branch, 6 Grange Road, Birkenhead, CH41 4DF**

**Account No. 36833061, Sort Code 60-05-07**

The sum of:

£..... (figures) ..... (words)

To be paid:

**Monthly / Quarterly / Annually (delete as appropriate)**

for a period of ..... years / until further notice (delete as appropriate)

The first payment to be made on ..... (day) ..... (month) ..... (year)

Signed	
Date	

### CHEQUE DECLARATION

I enclose a cheque, made payable to the **Birkenhead School Foundation Trust** for £ ....., or have made a direct credit (for this amount with the reference:.....)