

## **'I Believe in Epworth' Trust**

In the 21st century, one of the challenges that faces the Epworth community is the sustainability of our School. You can help contribute to the prosperity of our School and preserve the Epworth you know and love by investing in the future and making a donation or bequest to the 'I Believe in Epworth' Trust.

The 'I Believe in Epworth' Trust was formed:

**1. To establish an educational fund for the purpose of receiving donations for:**

- the carrying out of educational activities
- the provision, maintenance or improvement of facilities
- the acquisition or development of land, purchase of movables, the erection of buildings
- the repayment of any loan utilised.

**2. To use and apply the income and/or the Capital of the Fund for the following purposes:**

- To facilitate the reduction of school fees payable by fee-payers of the School
- To facilitate the provision of bursaries granted to pupils by the School
- To defray any expenditure directly incurred in providing educational and training facilities for the benefit of the School.

**3. To provide funds for Epworth School.**

- In giving to the 'I Believe in Epworth' Trust you will be in a position to make use of the tax and estate duty benefits provided by current legislation. As the 'I Believe In Epworth Trust' is a registered Public Benefit Organisation (PBO) and Non-Profit Organisation (NPO), when making a donation or bequest to the Trust you receive a deduction from your taxable income or a reduction in your estate duty. This is definitely a beneficial situation for the donor and recipient.
- All members of the Board of Governors make a donation to the 'I Believe in Epworth' Trust to show their commitment to Epworth.
- Should you be in a position to show your support, you may do this by making a donation or a bequest.

We would appreciate it if you would consider the following:

**1. Donation (annual / quarterly / monthly / once-off lump sum)**

By making a donation you receive a donation tax certificate which allows you to claim a deduction from your taxable income and which subsequently reduces taxes payable. If you wish to make a donation, please complete and return the pledge form together with your donation and/or bank details.

**2. Codicil to your Will / Bequest**

Money left to a registered Non-Profit Organisation in your Will is not only exempt from donations tax, but because it is subtracted from the net value of your estate before tax is calculated, can reduce the tax liability overall. Money which would otherwise go to the Receiver of Revenue will be used instead to support the 'I Believe in Epworth' Trust.

If you want to add a bequest to an existing will, this can usually be done by means of a codicil, which is simply an additional form read in conjunction with the will. Like the will itself, the codicil needs to be correctly worded and witnessed by two people, neither of whom stand to benefit from either the will or the codicil.

Under no circumstances should you write additional instructions onto the original will or cross anything out as you may invalidate the entire document.

If you wish to add a bequest to the 'I Believe in Epworth' Trust by means of a codicil, a form is available for you to download and print and / or is attached.

Once you have drawn up your bequest please inform us that you have benefited the 'I Believe In Epworth' Trust in your will. We would greatly appreciate it as having this information helps us to plan for the future.

Any and all contributions, no matter the size, would be greatly appreciated.