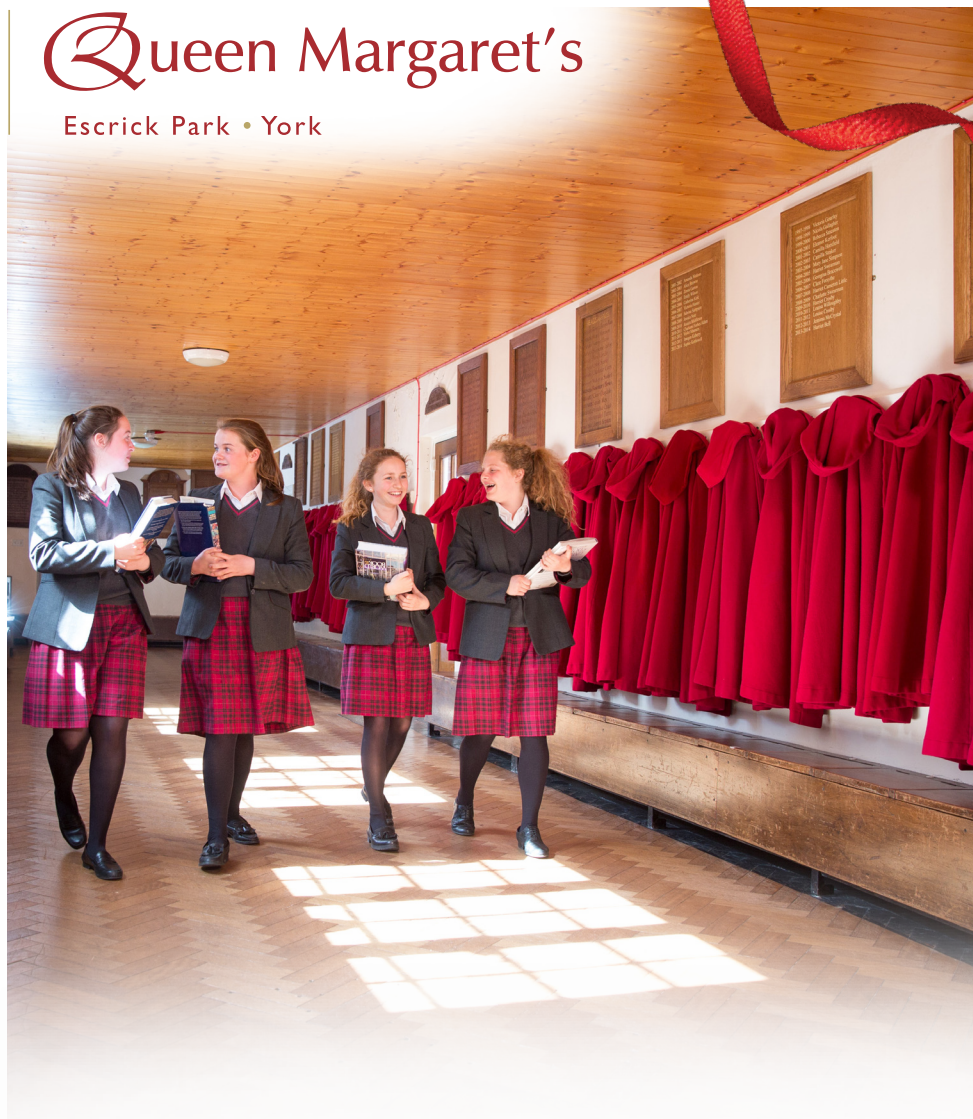


# Queen Margaret's

Escrick Park • York



*A Lasting Gift*

A LEGACY FOR **THE FUTURE**

# The Difference A Legacy Can Make

Queen Margaret's has a unique and proud history going back well over 100 years. The School may have relocated from Scarborough to Pitlochry and Castle Howard before settling in the beautiful Escrick Park but throughout those years QM has remained a highly successful independent school for independent girls.

With a reputation for academic excellence and outstanding pastoral care, a QM education continues to be an exciting, challenging and fulfilling experience. Our girls are part of a community of people who care for each other and grow as individuals. They develop a wealth of skills for use in their own lives and shape their values to assist them in making a difference in society.

Over the past 20 years the School has enjoyed a period of dramatic expansion, investing almost £10 million in new and improved facilities. It is important that we do not lose this momentum.

I hope that some of you who had the advantage of a QM education will feel that you would now like to give something back in acknowledgement of the start in life it gave you and help ensure the School's continued success.

Many people use their will as a way to provide for those closest to them but also to help causes they support and to acknowledge the positive influences that have shaped their lives. We are asking the QM Family for such support. A legacy gift from you, large or small, will help ensure that future generations of talented girls can benefit from a QM education.

*Emma Peart*

**Emma Peart**

Chair of The QM Foundation



# Generations Providing For Future Generations

Queen Margaret's is ambitious for its future. We understand the constant need to develop and to invest wisely for the coming generations. Generations before have also recognised this and many of the outstanding facilities enjoyed by students today have been made possible through their generosity.

We continually seek support for QM in the form of regular giving, gifts and funding for bursaries and capital projects is a constant priority. Our hope, for the long term prosperity of the School, lies with legacies. By remembering QM in your will, you will be helping to ensure that the School can continue to move forward with confidence. We realise that it is not practical for many of the QM Family to offer the School financial support during their lifetime but many do feel able to do so out of their estate.

Of course, when writing a will, it is our family and those closest to us who come to mind first. However, we hope you may consider how much your life has been influenced for the better by QM and by the generosity of previous generations of benefactors. If you then feel that you could do a little to help future generations, we would be delighted to hear from you.



## Why A Legacy Is Tax Efficient

Queen Margaret's is recognised as a charity by HM Revenue & Customs (Charity Commission number: 517523). As such, the School is not liable to pay tax on gifts received to support its aims during your lifetime or on your death. This means that if you leave a legacy to QM, the School will benefit from the full value it receives. In addition, if you choose to make a charitable gift in this way, you may reduce the overall tax liability of your estate.

When you leave a gift to QM in your will, your donation will either be taken off the value of your estate before inheritance tax is calculated or, if more than 10% of your estate is left to charity, then a reduced rate of inheritance tax is charged; this reduced rate is currently 36% compared to the full rate of 40%\*.

\* Based on current rates at 2019/20. Please check with HM Revenue & Customs for further information and current rates.

## Next Steps

There are several different types of gifts you can leave in your will which your Solicitor will be able to advise you on. Your legacy to QM will help ensure that the School continues to move forward into the future with confidence.

- It is relatively straightforward to make a legacy pledge to QM. It can be done in consultation with your Solicitor either when writing a will or by adding a codicil to an existing will.
- If you have already made a will naming QM as a beneficiary but have not told us about it, please let us know by completing the Legacy Pledge Form which is enclosed and returning it to us in the Freepost envelope provided.
- A legacy pledge has no legal status. However, it would be regarded as an encouraging sign to the School of your support. It would also help us further with our planning if you were prepared to give some indication as to the value of your gift.
- If you have already made your will and just want to make an alteration to it in the form of a legacy for QM, please contact your Solicitor or get in touch with the School.
- A legacy made for the general purposes of QM provides maximum flexibility. However, if you prefer, you can ask for your legacy to be used for a specific purpose - bursaries, a capital project or an area of personal interest. Please do let us know your wishes.

## The Agnes Body Legacy Society

Providing for QM in your will demonstrates an enormous commitment on your part, one that we think should be acknowledged during your lifetime. It signifies your belief in all that QM stands for and creates an enduring testimony beyond your death.

We have established ***The Agnes Body Legacy Society*** as a way to thank, and recognise in their lifetime, those who remember Queen Margaret's.

Miss Agnes Body became the first Headmistress of Queen Margaret's when it was founded in 1901. Her vision and integrity inspired the highest standards. She built up the School from seven girls in the first term to 69 the year after and also chose the name, Queen Margaret's, due to her special affection and veneration for the saintly Queen. The creation of ***The Agnes Body Legacy Society***, built on a remarkable and inspirational woman's values, is an exciting way of securing and shaping the School's future.

Membership of ***The Agnes Body Legacy Society*** is granted to all those who have indicated an intention to make a bequest to QM. ***The Agnes Body Legacy Society*** members are invited to an annual luncheon and other QM receptions and events throughout the year.



# Legacy Pledge Form

It would be very useful if you could let us know your present intentions. Information of this nature will help Queen Margaret's long-term planning. Any information you do give will be treated in the strictest confidence.

Please tick the relevant box(es):

- I have already made provision for QM in my will. **OR**  I intend to make a bequest to QM.  
It would be helpful if you felt able to give some indication of the value of your legacy. This is, of course, entirely optional and in no sense binding as a Legacy Pledge has no legal status. Any such information will be treated in strict confidence.

Estimated value of legacy: \_\_\_\_\_

- I am content for my bequest to be used for the general purposes of the School.
- I would like my bequest to be used for: \_\_\_\_\_
- Legacy donors are automatically included in *The Agnes Body Legacy Society* and receive an invitation to an annual luncheon and other events throughout the year. However, if you would prefer not to be contacted about this, please tick the box.
- I would like my pledge to remain anonymous.
- I would like to discuss my bequest with you. Please contact me.

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

Print Name: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_ Email: \_\_\_\_\_

Please return to: The Development Team, Queen Margaret's, in the Freepost envelope provided.

CONFIDENTIAL







To discuss legacies in more detail please contact: the **QM Development Team:**  
Tel: 01904 727638 | Email: [development@queenmargarets.com](mailto:development@queenmargarets.com)



SECURING A FUTURE  
*journey*

01904 727600

[QUEENMARGARETS.COM](http://QUEENMARGARETS.COM)

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