



CHARTERHOUSE

Your Legacy, Their Future.



Their Future

Philanthropy has long played a central role in Charterhouse's history, beginning with Thomas Sutton's extraordinary bequest in 1611.

Sutton's vision has been enhanced by further bequests since then, from people who have embraced our conviction in the power and opportunity of a Charterhouse education to shape young peoples' lives for the better.

The legacy of their generosity is the School we know today and countless Carthusians have benefitted from their foresight over generations. Through your support we can continue to provide opportunities for future Carthusians to join our community, alongside caring for and maintaining our historic School.

Charterhouse has always encouraged our pupils to broaden their thinking and develop entrepreneurial and leadership skills. We empower them to explore their own paths, in order to prepare for the professional workplace and thrive within our global society. Using their foundation of knowledge, values and experiences from Charterhouse, we equip pupils to embrace opportunities to guide their future.

Your Legacy

An education at Charterhouse is a transformative experience, and one that ensures a lifelong community, wherever you end up in the world. As many Old Carthusians will attest to, our Beaks are passionate about preparing our pupils for both academic success, as well as developing foundations for professional and personal fulfilment.

Throughout the School's history, values as well as knowledge have been central to our teaching. Responsibility, duty and service are at the very heart of our ethos and we aim to equip all pupils with the self-awareness, resilience and flexibility to carry them into later life.

Bestowing a legacy is one of the most significant ways of leaving a lasting imprint on the School. It costs you nothing in your lifetime but provides future generations with the impact of your support. Bequests have always been at the heart of Charterhouse's story, and we hope you will continue this tradition.

Legacy support is vitally important to us as it helps to provide additional funds to support the School's bursary programme and masterplan. We welcome legacy gifts of any size as the collective impact of legacies makes a huge difference. It's easy to pledge a legacy to Charterhouse and as a registered charity all bequests to us from UK taxpayers are free of inheritance tax and can also help to reduce the overall tax liability on your estate.

Thank you for your interest in the value of the education we provide and we hope that you will consider supporting the School through a legacy.

1980s Swimming Baths



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In hindsight my time at Charterhouse feels like the “glory days”. Whilst challenging and a test of character at times, my time at the School taught me the true value in approaching every opportunity with a fierce work ethic and an open-mind. From developing friendships for life to achieving academic grades I'd never dreamed possible, the School gave me a platform to fulfil my potential.

Above all it has not only broadened my mindset in terms of the opportunities available to me but also given me the tools to pursue them with confidence. Without bursary support, the chance to attend such a prestigious School would never have been possible. I still remember the day we found out I'd received the award, my mother crying with joy and my late grandfather with the proudest of smiles – it was an award for us all.

I think it's hard to repay anyone for such generosity, I suppose thank you is a great start. This will never be enough in my eyes as the bursary truly has changed the trajectory of my life, personally and professionally. I'm extremely grateful and will forever feel a sense of gratitude but also a responsibility to one day give back to society and the School.

After finding myself the fortunate beneficiary of donations to support my bursary, I can honestly say without hesitation that it has been life changing. I think after enjoying my time at Charterhouse and subsequently the OC football club, I've come to realise that giving back to the School is what makes Charterhouse so special.

James Garrard (F18)

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“ My time at Charterhouse was full of formative experiences in which I was exposed to the many different facets of school life – academia, sport, theatre and music – to name but a few – along with meeting like-minded people in these pursuits. I have felt incredibly privileged to have been taught, coached and inspired by top level educationalists across the whole sphere of activities at the School and many of these teachings and ideas I carry with me to this day.

The great thing is that everything doesn't stop when you leave the School, as you are ushered into the OC world with all the huge benefits that it can bring.

These two paragraphs hardly do justice to my time during and after leaving the School. I would urge anyone who has benefitted from their experiences at Charterhouse in any way to help ensure the future of the School by making a bequest or remembering the School in their Will.

Richard Johnson (P86)
Thomas Sutton Society Member

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Science class

1960s

A gift that endures

What happens to your bequest is a matter of personal choice. Areas of consideration include whether you have a specific purpose in mind, and whether you would prefer the School to spend the funds for the benefit of the current generation or endow them in perpetuity.

Leaving
Chapel

1970s

UNRESTRICTED LEGACY gives the School the flexibility to use its discretion in directing your bequest to wherever the need is greatest for maximum impact. This enables the School to make sure that your gift truly leaves a lasting legacy.

RESTRICTED LEGACY can reflect your wishes by directing your support towards a specific area of Charterhouse's activities such as our bursary programme, social outreach or our campus development programme. If you would like to make a restricted legacy, we would be delighted to discuss this with you to ensure that the School is able to honour and fulfil your wishes.

Tax Efficient Giving

Pledging a legacy to Charterhouse is a tax efficient way to support our current and future work. We are a registered charity (312054) and are exempt from Inheritance and Capital Gains Tax.

Different types of legacies

Residuary Legacy is a gift of all or a percentage of your estate after specific gifts to family and friends have been made. Residuary legacies increase with the value of the estate and will not be eroded by inflation.

Pecuniary Legacy is a bequest of a specific sum. They can be index-linked to ensure that the final amount gifted to the School keeps pace with inflation.

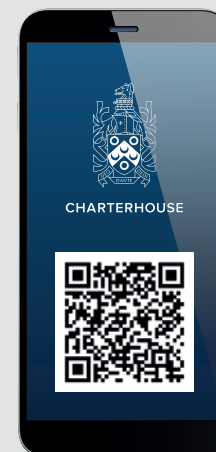
Specific Legacy relates to a bequest of stocks and shares, property, artworks or other objects. It is important that if you intend to leave a specific gift, you let us know so we can ensure we are able to meet your wishes.

Reversionary Legacy is a bequest that becomes payable to the School after the death of those who have been specifically named to benefit from the assets you leave.

Conditional Legacy requires a particular event to occur in order for Charterhouse to receive your bequest and is most common when you outlive all of the beneficiaries in your Will.

If you find yourself beneficiary of a Will, you may be interested to know that it is possible to transfer the whole or part of an inheritance to Charterhouse using a deed of variation. Bequests that are transferred in this way become free of Inheritance Tax and can be an effective way to support the School during your lifetime.

It is also possible for UK donors with Charities Aid Foundation (CAF) accounts to nominate Charterhouse as a beneficiary through the CAF's Expression of Wishes Form.



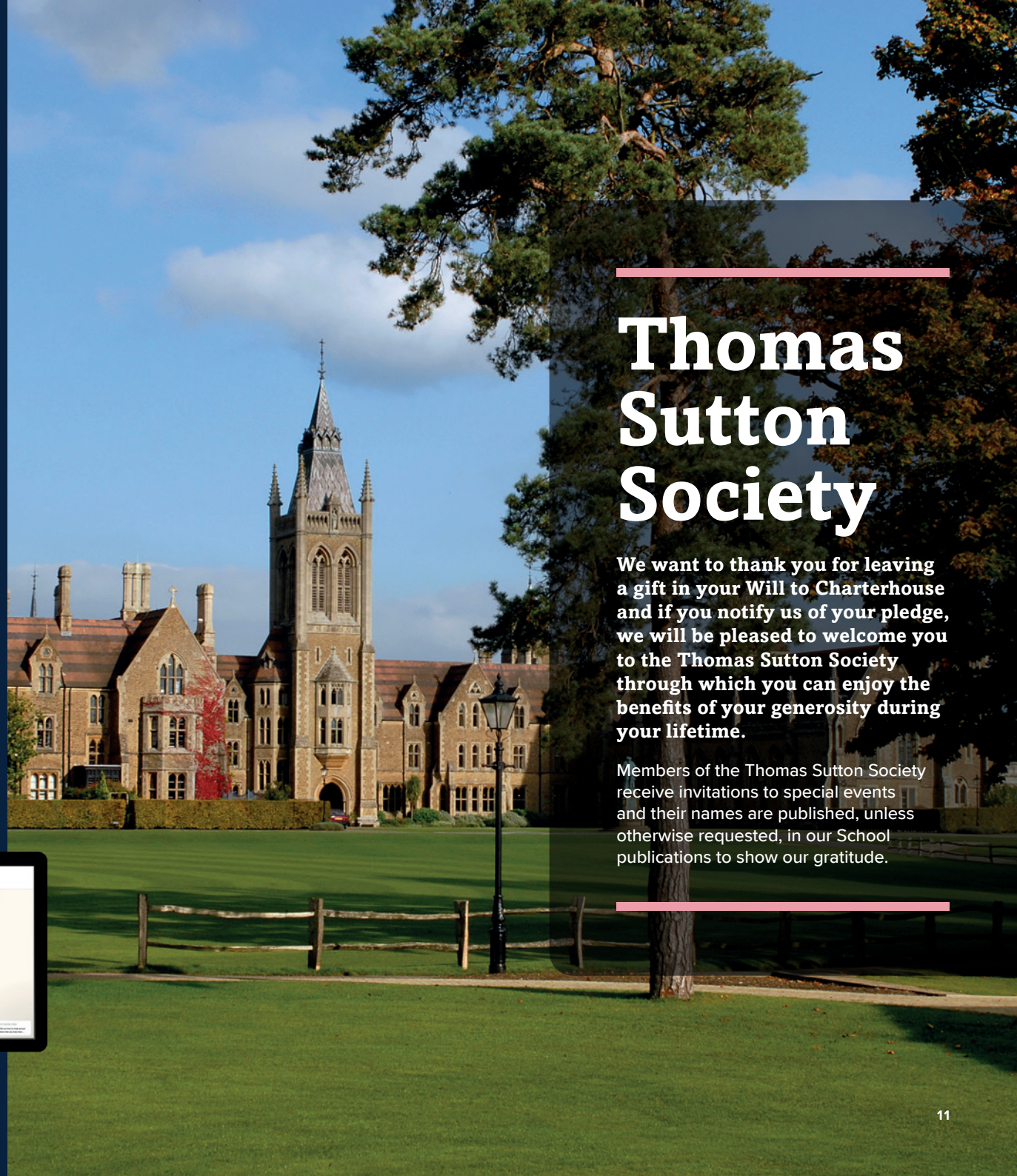
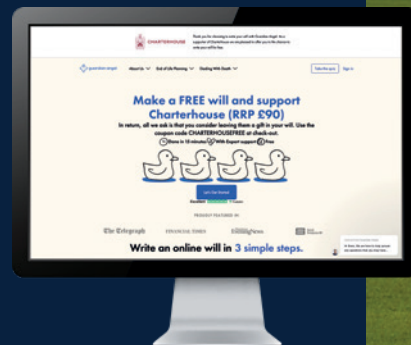
Making or updating your Will

You can make provision for Charterhouse by establishing a Will naming the School as a beneficiary, or by amending an existing Will using a codicil.

We recommend that you seek qualified legal advice when drafting or amending your Will. A bequest to Charterhouse should refer to the School by its full legal title: The Governing Body of Charterhouse School (Registered Charity 312054).

If you would like to leave a restricted legacy, we would be pleased to discuss this with you, to offer guidance about possible options that will ensure your wishes can be honoured in full.

If you are yet to create a Will and would like to support Charterhouse, you can do so for free via Guardian Angels. gawill.uk/charterhouse



Thomas Sutton Society

We want to thank you for leaving a gift in your Will to Charterhouse and if you notify us of your pledge, we will be pleased to welcome you to the Thomas Sutton Society through which you can enjoy the benefits of your generosity during your lifetime.

Members of the Thomas Sutton Society receive invitations to special events and their names are published, unless otherwise requested, in our School publications to show our gratitude.



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