



CAMPBELL
COLLEGE

Est 1894

Legacy Giving

Make your legacy
part of our future





Introduction

Campbell College Belfast was established in 1894 thanks to a legacy bequest from linen merchant, Henry James Campbell. Over one hundred and twenty-five years later and the College is now home to 1,200 pupils aged three to 18, including a boarding cohort of 150 boarders from 30 different countries.

The Board of Governors is committed to building on this legacy; preserving our heritage for the benefit of everyone, whilst developing our facilities to deliver the very best educational environment for the next one hundred and twenty-five years.

As a College which started with a legacy we recognise the vital role legacy gifts will play in our future. We understand that it is not always possible or practical for many of our friends to offer financial support during their lifetime and sometimes a legacy bequest may be easier or more appropriate to individual circumstances. Gifts left for Campbell College in a bequest are highly tax efficient and will help secure the long-term future of the College.

We hope that memories of your time at Campbell are fond ones and that you might consider **making your legacy part of our future.**

Types of legacy

There are several different types of gift you can leave in your will. The most common are described here. If you are considering leaving a gift to the College in your will, our Development Director will be happy to talk to you in confidence about your wishes. Whilst we cannot offer any legal or financial advice, we are happy to answer any questions you may have.

Residuary Legacy

A Residuary Legacy is a gift of all or a percentage of your remaining estate, after all fees, outstanding costs and other bequests have been taken care of. The advantage of a Residuary Legacy Gift is that it keeps pace with inflation as it is not a fixed sum.

Pecuniary Legacy

A Pecuniary Legacy is a gift of a fixed sum of money. The value of Pecuniary Legacies will decrease over time, as the cost of living increases. You can link your Legacy to the Retail Price Index to ensure that the value of the gift you make today is worth the same in the future.

Other types of gifts;

Specific Legacy

You can make a gift of land, buildings, personal property (such as antiques or jewellery), shares or securities tax free to Campbell College and as a registered charity we do not pay stamp duty on receipt of outright gifts of land or buildings.

Reversionary Legacy

A Reversionary Bequest is one which allows named persons to benefit from assets during their lifetimes, after which the assets are transferred to the ultimate beneficiary.

Substitution Legacy

Testators can provide for the eventuality that their named dependants do not survive them by making a conditional bequest to other beneficiaries, perhaps including Campbell College.

Deed of Variation

If you become a beneficiary of someone else's will, you may wish to consider transferring the whole or part of that inheritance to Campbell College using a Deed of Variation. The value thus transferred would be exempt of the Inheritance Tax which would otherwise have been payable out of the estate in respect of the value transferred.

How do I make a legacy gift?

The decision to leave a legacy is a very personal one and we fully understand if you prefer to keep your intentions private. However, if you do wish to let us know about a legacy gift for the College, we will be able to thank you personally and keep you up to date about the impact your gift will make.

Making a pledge... It is relatively straightforward to make Legacy Pledge to Campbell. It can be done in consultation with your solicitor, either when making a will for the first time, or by adding a codicil to an existing will.

Letting us know... If you have already made a will naming Campbell College as a beneficiary, but have not told us about it and would like to, you can do so by completing the Legacy Pledge Form on our website and return it to – [Campbell College, Development Office, Belmont Road, Belfast, BT4 2ND](#) or via email to lmckeown667@c2kni.net.

This Legacy Pledge Form has no legal status. However, it would be regarded as an encouraging sign to the College of your support. It would also help us further with our planning if you were happy to give some indication of the value of your gift. There is no obligation to complete this form.

Changing your will... If you have already made your will and just want to make an alteration to it in the form of a legacy for Campbell, you should complete a codicil form in consultation with your solicitor.

An example can be found on our website. Again, if you are happy to let us know of your intentions you can send a copy of this Codicil Form for our records to [Campbell College, Development Office, Belmont Road, Belfast, BT4 2ND](#) or via email to lmckeown667@c2kni.net. There is no obligation to do so.

Of course, we strongly advise that you seek professional legal advice when drafting or amending your will.

Tax benefits

Why a legacy to Campbell College is tax efficient?

Campbell College is recognised as a charity by HM Revenue & Customs. It pays no tax on gifts of money during your lifetime or on your death. All legacies to Campbell are free from Capital Gains Tax and Inheritance Tax. If you choose to make a charitable gift in this way, you will reduce the total tax liability of your estate to your family.

We would strongly advise that you consult with a professional financial advisor regarding all tax and financial matters and check with HMRC for the latest details.

Making a difference

Thank -you for taking the time to understand more about legacy giving and should you wish to talk further please do not hesitate to get in touch **with Laura McKeown, Development Director via lmckeown667@c2kni.net or by telephone 00 44 (0) 2890 763076.**

Your support is vital, and every penny will truly make a difference for the future of the College and our pupils.

*Make your legacy
part of our future.*





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If you have any questions, or would like to discuss your plans in confidence, please contact Laura McKeown, Development Director.

T. 00 44 (0) 2890763076

E. lmckeown667@c2kni.net