

January 2010

## THE OLD PORTMUTHIAN CHARITY

(Charity Reg. No. 1016072)

Dear Fellow Old Portmuthian,

### LEGACIES

We hope that you will excuse our writing to you about the Old Portmuthian Charity. You may be aware that it was set up in 1992 to advance education at Portsmouth Grammar School and to provide relief for any person connected with the School who is in need, hardship or distress. The Trustees' current policy is that the bulk of the money distributed should be devoted to bursaries.

The purpose of this letter is simply to ask you, when you are next reviewing your Will, after catering for your family, to bear the School and Charity in mind. There must be many of us who are grateful to PGS for providing us with the education that set us on the road to satisfying and profitable lives and careers. Recently the Charity has received three significant legacies, which have helped it to make the contribution mentioned below, but we would much appreciate any sum, large or small (legacies to charities are not subject to Inheritance Tax). If sufficient numbers of OPs were to remember with gratitude their time at PGS in this way, the Charity would be able, in due course, to help many more pupils in need.

Thanks to the generosity of OPs, the Charity was able, in 2004, to set up an Old Portmuthian Bursary Fund as part of the School Appeal. This is helping to finance some needy pupils through the Sixth Form. More recently, the Charity has provided additional funds for the same purpose, and for 2008 to 2010 it is funding one full-fee Sixth Form Bursary.

Despite the generosity of some OPs, the funds available to the Charity are still small. From figures provided by the School, we estimate that the OP Charity contributes about 1% of the total annual budget for scholarships and bursaries throughout the School. In the Sixth Form alone our contribution usually helps one or two applicants at a time, whereas about 15 apply for financial assistance annually. Clearly we could do much more if we had the necessary funds. We would emphasise that all those we have helped and propose to help must make out a very strong case of need. Some of the circumstances are most distressing.

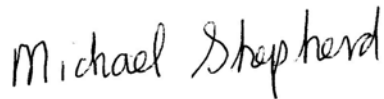
The importance of the availability of bursaries has been heightened by the new rules regarding the charitable status of independent schools. In the past it has been sufficient for such schools simply to provide education in order to satisfy the test of 'public benefit'. This is no longer the case, and the School is now required to report to the Charity Commission through its annual governors' report on the 'public benefit' it provides. The single most important aspect of this for a fee-paying school is the provision of significant bursary support to families who could not otherwise have sent their child to PGS.

Details for communicating with the OP Charity are **c/o: Barry Easton, Trustee, The Old Portmuthian Charity, 7 Spindrift Mews., Bosham, West Sussex, PO18 8LW**

PGS remains a magnificent school. As part of its continued development, the senior management has been enhanced by the appointment of a full time Development Director. The Director is

devoting considerable effort to the future of the School, and this includes the fabric as well as bursaries for pupils. We feel it appropriate that we should draw your attention to the wider opportunity of also considering legacy giving direct to the School, in which case please contact the Development Director at the School (Mr Alasdair Akass 023 9236 4248 or [a.akass@pgs.org.uk](mailto:a.akass@pgs.org.uk)) or the Bursar (Mr Don Kent 023 9236 4213 or [d.kent@pgs.org.uk](mailto:d.kent@pgs.org.uk)).

Thank you for your consideration. We send you our very best wishes.



Michael Shepherd  
(Chairman of the Trustees)



Max Lankester  
(President of the OP Club)

nb The OP Charity is neither qualified nor insured to provide legal advice on will-making.