



MONMOUTH SCHOOL
FUND 400
Assisted Places and Bursary Fund for Monmouth School

William Jones, Benefactor and Merchant Haberdasher



Monmouth School,
yesterday, today, tomorrow...

Introducing

FUND 400

Assisted Places and Bursary Fund for Monmouth School

Supporting boys of ability from low-income
backgrounds to benefit from a Monmouth School
education



HEADMASTER
Dr Steven Connors
*Member of the
Headmasters' and
Headmistresses'
Conference (HMC)*

The opportunity to celebrate 400 years of learning at Monmouth School encourages us all to reflect on the past and look forward to the future. Leading this famous School as it embarks on the next 400 years poses real challenges. I passionately believe in the founding principal of open access that was a core part of the original vision of William Jones; Monmouth was founded as a 'Fre Schole' after all. However, with no help from government and with ever spiralling demands for the best facilities to attract the highest calibre of pupils and teaching staff, the capacity to offer a large number of Assisted Places and Bursaries is becoming more and more threatened.

Whether you are in a position to fund a whole place, half a place, a small percentage of a place or just a few days of a place, all is helpful as we endeavour to keep our commitment to the founding principles of William Jones and attract those with potential to do well, whether academically, in music or sport, as previous generations have done, regardless of their parents' wealth.



Introducing the Monmouth Schools' Charitable Trust

The Monmouth Schools' Charitable Trust has been established to coincide with the 400th Anniversary of Monmouth School, to enhance and substantially support means-tested places and capital improvements over and above the income received from the endowment (the William Jones's Schools Foundation). The Trustees of the newly formed charity are largely made up of former pupils who have been successful in law, business and academia.

The Charitable Trust has been formed to cover all the schools in the Monmouth group but initially its focus will be on Monmouth School and will give a clear message to all constituent groups (Old Monmothians, current and former parents, current and former staff and current and former Governors) that a new chapter in the history of the School has begun in time to mark the 400th Anniversary in 2014. Fundraising efforts will be focused with the launch of Fund 400, the Assisted Places and Bursary Fund for Monmouth School and the launch of the 1614 Society.

The first Board of Trustees has been selected by the Headmaster of Monmouth School from the breadth of available talent in the current parent and Old Monmothian community. We are grateful to the parents and Old Monmothians who are supporting the work of the Trust.

First Board of Trustees

CHAIRMAN: David Hitchcock

MD at JP Morgan, Old Monmothian and major donor to Monmouth School

Dr Steven Connors

Headmaster, Monmouth School

Richard Booth QC

London-based Barrister, Old Monmothian and current parent

Eddie Butler

BBC Sports Commentator, Old Monmothian and current parent

Professor Richard Carwardine

President of Corpus Christi College Oxford, Old Monmothian

Sir Frank Davies CBE, OStJ

Former Chairman of The Health and Safety Commission, Old Monmothian

Warren East

Former CEO of ARM Holdings plc, Old Monmothian

Noel Manns

Principal & Founder Partner of Europa Capital, Old Monmothian

The Lord Moynihan

Former Chairman of the British Olympic Association, Old Monmothian

Chris Nott

Managing Partner at Capital Law, current parent

Sheridan Swallow

Chairman of Governors

Murray Kerr

Chairman of MS Committee

Martin Anderson

Chairman of HMSG Committee



**MONMOUTH
SCHOOL**

A SCHOOL OF THE HABERDASHERS' COMPANY

1614 - 2014

400 YEARS
OF EDUCATIONAL EXCELLENCE

Building for
the future



Fund 400 – Assisted Places and Bursary Fund to celebrate the 400th Anniversary

Whilst around 200 boys in the School currently receive means-tested financial assistance this number will steadily decrease over the next few years as Monmouth School also tries to update and improve teaching and learning facilities. For the first time this year, we have seen talented boys, from low-income families, unable to take up a place at Monmouth School because we were just unable to offer enough financial support. With your help, we can halt this trend and continue to retain the social and economic mix which is at the heart of a Monmouth School education.

“2 in 7 boys at Monmouth School currently receive some sort of means-tested financial assistance.”

In the past, a Monmouth School education for boys from low-income families was always a given. Generations of boys, whether their parents could afford full fees or none, have been educated to the highest standard and gone on to play their part locally and nationally in business, academia, the Armed Forces, the arts and sport. The Direct Grant system (operated between 1944 and 1979) and the Government Assisted Places Scheme (operated between 1979 and 1997) were examples of state funding that enabled poorer families to send their sons to Monmouth and a large proportion of current Old Monmothians benefited from these two schemes.

The creation of Fund 400 enables former pupils, many of whom have benefited from financial support in the past, to say 'thank you' in a tangible way. Contributing to Fund 400 will help the next generation of boys gain access to a Monmouth School education and ensure this tradition survives.

“I feel strongly that, without the William Jones Scholarship, my life would have been very different. It is important for me to repay, as best I can, the help I was given.”

David Hitchcock, Old Monmothian 1974 - 1981, (New House)

How you can help

A day place at Monmouth School currently costs around **£13,800** per year equivalent to **£4,372** per term or **£386** per week. Please consider giving as much as you can on a regular basis.

One of the best ways to help Monmouth School is by making regular monthly or quarterly donations by direct debit. Donations given in this way provide a reliable, predictable income for The Assisted Places and Bursary Fund and allows the School to plan for the future.

Tax efficient giving

Completing the 'Gift Aid' section enables the Trust, as a registered charity, to augment donations by reclaiming tax from the Government and also allows higher-rate tax payers to claim tax relief via their tax return.

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“

Monmouth School has provided me with a multitude of amazing experiences and friends for life.

”

*Mike Bird, 74 - 81
Old Monmothian
(Tudor House)*



Giving from Overseas

United States

Monmouth School has, for many years, offered alumni who live in the US and/or pay US taxes the opportunity to make tax efficient gifts.

Monmouth School is a member institution of the British Schools and Universities Foundation Inc (BSUF) This is a charitable organisation recognised by the US Internal Revenue Service under Section 501 (c) (3) of their Codes. The BSUF's Federal ID Number is 13-616-1189 and gifts to Monmouth School made through BSUF allow the US donor to claim tax relief. Please see the BSUF website: www.bsuf.org for further details



For further information please contact:
development@monmouthschool.org

FUND 400

Development Office
Monmouth School
Almshouse Street
Monmouth
NP25 3XP
T: 01600 713143
development@monmouthschool.org

Fund 400 the Assisted Places and Bursary Fund for Monmouth Schools' Charitable Trust
Registered Charity Number: 1151698





MONMOUTH SCHOOL FUND 400

Please complete using BLOCK CAPITALS, return using the pre-paid envelope provided or by hand to Monmouth School reception.

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| Name: | | | |
| Title: | | Honours: | |
| Address: | | | |
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| Former Pupil | <input type="checkbox"/> | Former Parent | <input type="checkbox"/> | Former Staff Member | <input type="checkbox"/> | Current Parent | <input type="checkbox"/> |
| Governor | <input type="checkbox"/> | Friend | <input type="checkbox"/> | Current Staff Member | <input type="checkbox"/> | Former Governor | <input type="checkbox"/> |

I would like my gift to be allocated to an:

Assisted Place bursary (Headmaster's choice) ☐ Assisted Place bursary (academic) ☐

Assisted Place bursary (music) ☐ Assisted Place bursary (sport) ☐

With a sporting preference for _____

We will guarantee that your gift will be allocated into one of the four areas listed and will endeavour to channel a sports award to the sport of your choice.

I am a UK Tax payer and would like Monmouth Schools' Charitable Trust to treat this and all future donations I make to the Charity, as Gift Aid donations. I note I must have paid an amount of income tax or capital gains tax that at least equals the tax reclaimed on this donation

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Signature _____ Date _____

Please return your completed form to:

Mrs Clare Anning, Development Director, Monmouth Schools' Charitable Trust, Monmouth School, Almshouse Street, Monmouth NP25 3XP Tel: 01600 713143 Fax: 01600 772701 development@monmouthschool.org



MONMOUTH SCHOOL FUND 400

I would like to support an Assisted Bursary Place by making a donation of £

PAYMENT METHODS

I would like to pay by cheque

☐

I would like to pay by BACS transfer

☐

Lloyds Bank

Sort Code xx xx xx Account: xxxxxxxx

I would like to pay by credit/debit card

Mastercard

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Visa

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Visa Debit

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Switch

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Card Number:

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Instruction to your Bank or Building
Society to pay by Direct Debit



Please fill in the whole form using a ballpoint pen and send it

The School Accountant, Monmouth Schools' Charitable Trust, Almshouse Street, Monmouth, NP25 3XP

Reference Number:

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I would like to make a regular donation of £

I would like to set-up a Direct Debit

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Name of your Bank/Building Society

To the Manager

Address

Postcode

Branch Sort Code

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Please make the payment on the 1st of

month

/

year

And then, the amount £

annually

☐

quarterly

☐

monthly

☐

• Please pay Monmouth Schools' Charitable Trust direct debit from the account detailed in this instruction subject to the safeguards assured by the Direct Debit guarantee. I understand that this instruction may remain with Monmouth Schools' Charitable Trust and details passed electronically to my Bank/Building Society.

• The amount above is to be taken from my **account, annually, quarterly or monthly** as indicated, until I instruct you otherwise.

Signature

Date

This Guarantee should be detached and retained by the payer:

The Direct Debit Guarantee

- This Guarantee is offered by all banks and building societies that accept instructions to pay Direct Debits
- If there are any changes to the amount, date or frequency of your Direct Debit Monmouth Schools' Charitable Trust will notify you 14 working days in advance of your account being debited or as otherwise agreed. If you request Monmouth Schools' Charitable Trust to collect a payment, confirmation of the amount and date will be given to you at the time of the request
- If an error is made in the payment of your Direct Debit, by Monmouth Schools' Charitable Trust or your bank or building society, you are entitled to a full and immediate refund of the amount paid from your bank or building society - If you receive a refund you are not entitled to, you must pay it back when Monmouth Schools' Charitable Trust asks you to.
- You can cancel a Direct Debit at any time by simply contacting your bank or building society. Written confirmation may be required. Please also notify us.