



LEGACY SAMPLE WORDING CANADIAN TAXPAYERS

For Canadian taxpayers, a bequest made to the University of Oxford Development Trust Fund (which will forward gifts directly to Univ) is deductible for estate tax purposes, and there is no limit on the amount of the estate tax charitable deduction. You can make a bequest to the University of Oxford Development Trust Fund by creating a new Will, adding a codicil to your current Will, designating the University of Oxford Development Trust Fund as a beneficiary of your retirement plan, or including the University of Oxford Development Trust Fund in your revocable trust or other estate plan.

The following examples may be tailored to best suit your interests. Please note that for legal reasons, the Trustees of the University of Oxford Development Trust Fund may not be bound by your request – but they have in every case to date been able to honour donors' requests for direction of funds.

To create a bequest for immediate use, the preferred phrase is: "I direct my Estate Trustee to transfer as a gift to the University of Oxford Development Trust Fund (an educational institution specifically designated for charitable donations under the Income Taxes Act (Canada) and Regulations [Section 3505] thereto) (the sum of \$____) (____% of my estate) (residue of my estate), to be used for the benefit of University College, Oxford."

To create a bequest to establish an endowment fund, the preferred phrase is: "I direct my Estate Trustee to transfer as a gift to the University of Oxford Development Trust Fund (an educational institution specifically designated for charitable donations under the Income Taxes Act (Canada) and Regulations [Section 3505] thereto) (the sum of \$____) (____% of my estate) (residue of my estate). I request that upon receipt by the Master and Fellows of University College Oxford, this fund should be held in trust and kept invested and the income from which shall be used for such purposes in connection with the work of University College, Oxford as the Master and Fellows of the College may from time to time determine."

Please contact the Development Team for further details on +44 (0)1865 276674 or
E-mail: development@univ.ox.ac.uk

The contact address for the University of Oxford Development Trust is: University of Oxford, Development Office, Oxenford House, Magdalen Street, Oxford OX1 3AB, England. Please also advise your Estate to notify the Univ Development Office of any legacy settlement.