



THE POWER OF A LASTING LEGACY

A guide to remembering
Univ in your will



SUPPORTING TOMORROW'S LEADERS

Legacy gifts have a transformative impact on the future generations of students at Univ. They open doors to education by funding scholarships and bursaries for gifted students, help fund academic posts and provide new facilities and resources for the College.

Your support will inspire and enable students to reach their full potential, providing them with the resources, facilities, and exceptional teaching that will shape their future. Once you have provided for your loved ones, leaving a legacy is a powerful way to invest directly in the lives and ambitions of tomorrow's leaders.

WHAT IMPACT WILL MY LEGACY MAKE?

By remembering University College in your will, you will be supporting our mission to provide our talented and diverse students with a superb environment for learning.

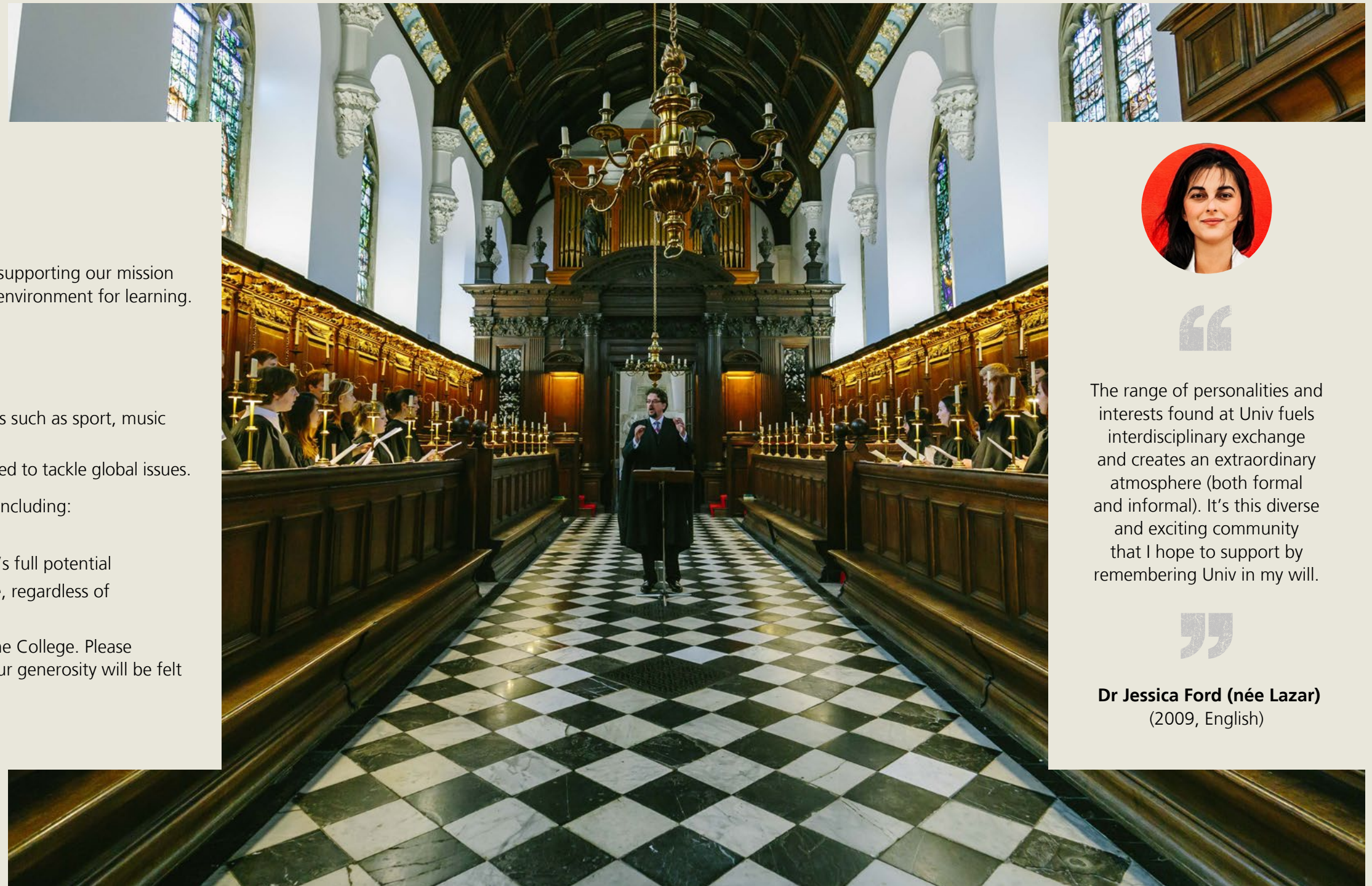
Legacies help us to:

- maintain tutorial teaching in College
- provide financial help to students who need it
- offer high-quality opportunities for non-academic activities such as sport, music and theatre
- equip future leaders with the knowledge and skills they need to tackle global issues.

In recent years, legacy donations have fuelled vital projects including:

- the College's new development at Univ North
- pastoral and support services to help unlock each student's full potential
- access initiatives to provide opportunities to young people, regardless of background.

Leaving a legacy is a powerful and lasting way to support the College. Please consider including Univ in your will today. The impact of your generosity will be felt for generations to come.



“

The range of personalities and interests found at Univ fuels interdisciplinary exchange and creates an extraordinary atmosphere (both formal and informal). It's this diverse and exciting community that I hope to support by remembering Univ in my will.

”

Dr Jessica Ford (née Lazar)
(2009, English)

WHY LEAVE A GIFT IN YOUR WILL TO UNIV?

Unrestricted legacies support all aspects of College life. Whether our students go on to address inequalities of opportunity or become leaders in solving the challenges facing our world, your legacy gift will have lasting and far-reaching benefits.

Legacy gifts keep on giving, long into the future. By pledging a legacy gift, you are enabling Univ to plan ahead and become more financially sustainable.

Legacy gifts are tax free. A legacy gift to University College is free of tax and may reduce the inheritance tax liabilities on your estate.

Non-monetary gifts. If you would like to leave non-monetary gifts, for example shares or items of property, we would be grateful if you could discuss these with the College in advance.

You can get in touch at legacies@univ.ox.ac.uk



We understand that the contents of your will are a private matter. However, should you wish to let us know of your intention to leave a gift to Univ, we would be delighted, as we would then be able to thank you for your kind support.

To show our appreciation, we invite those who have pledged a gift in their will to join our William of Durham Club.

Members are invited each year to a luncheon with the Master in College, with a guest speaker, and a concert or a performance by the Univ Players. It is a popular event, often attended by current and Emeritus Fellows as well as Old Members and friends.





MAKING YOUR PLEDGE

After providing for your family and friends, it is possible to leave to Univ either a capital amount (pecuniary gift) or a share of the residue of your estate (residuary gift). Please note that an advantage of a residuary legacy is that its value will not be eroded by inflation. Whether £1,000 or £100,000, or from 1% of your estate to 100%, your legacy gift will make a significant difference.

Once you have included a legacy gift in your will, you can let the College know by emailing us at legacies@univ.ox.ac.uk or call us on **+44 (0)1865 276 958**. We will then be in touch to check that you have everything you need, and – if you wish – to discuss your legacy in more detail.

We suggest using the following wording in your will:

I bequeath to the Master and Fellows of the College of the Great Hall of the University commonly called University College in the University of Oxford (Registered Charity Number 1141259) [the residue of my estate] / [_____ % of the residue of my estate] / [the sum of £ _____] free of tax for the general

purposes of the College and I further direct that full receipt of the Bursar or other authorised officer of the College shall be a full and sufficient discharge to my Executors and Trustees.

By making your gift unrestricted, you will provide the College with maximum flexibility to use the funds as it sees fit at the time.

Planned giving for USA residents

Old Members and friends of the College in the United States who wish to leave a gift in their will may do so through the College directly, or through AFUCO (American Friends of University College, Oxford), in consultation with their solicitors.

Please see the AFUCO legacies bequest guide for further details, including suggested wording, on the AFUCO website www.afuco.org

AFUCO is a registered 501(c)(3) tax-exempt organisation under the Internal Revenue Code and can manage living and legacy donations from US residents on behalf of the College.

YOUR LEGACY AND TAX

Legacies can benefit your estate as well as the College.

- A legacy gift to a charity such as University College is exempt from Inheritance and Capital Gains Tax in the UK. University College has charitable status under the Second Schedule to the Charities Act 1993.
- If you leave at least 10% of your taxable estate to charity, the Inheritance Tax rate for the rest of your estate may decrease from 40% to 36%. In effect, you may be able to leave more to charity while reducing the impact on your loved ones' inheritance. Please visit www.gov.uk/inheritance-tax-reduced-rate-calculator to find out more.

You might also wish to look at <https://inheritancetaxzero.co.uk> to find out how you can maximise the philanthropic impact of your will.

For further information on Inheritance Tax please visit www.gov.uk/inheritance-tax. We recommend that you seek professional financial advice if your estate is likely to be liable for Inheritance Tax.



“

Univ gave me what I needed to embark on a fascinating and successful career. That is why I decided to give something back through a legacy to this marvellous institution, where I spent three very happy years.

”

Alun Evans, CMG
(1958, History)



MAKE A WILL ONLINE

We have partnered with an organisation called “Make A Will Online” to offer all UK-based Univ Old Members access to an online will-writing service. Making your will online through the portal is easy and substantially discounted (£60 per will) and every will is checked by a fully qualified UK solicitor. If you have any legal questions in the process of writing your will, these can be answered too. Scan the QR code below to be taken to the “Make a Will Online” website or visit bit.ly/UnivMAWO.



Protecting your wishes

When you use our will service with “Make a Will Online”, you will also be given access to Capacity Vault through the platform, free of charge. Please see the “Make A Will Online” web pages for details of this service.

Make a will face to face

If you already have a solicitor or if you would rather speak to a solicitor face to face, you should, of course, do so. Also, if you have a large estate above the Inheritance Tax threshold (see the guide to inheritance tax on www.moneyhelper.org.uk), or if you have a complex estate (e.g. trusts or foreign assets) you should also speak with a solicitor. You can find one here using the Law Society website (<https://solicitors.lawsociety.org.uk/>). And finally, where there is any worry related to testamentary capacity, we always suggest speaking with a solicitor face to face.

When you discuss your bequest to Univ with your solicitor, please ensure you use these details:

- Full name: University College in the University of Oxford
- UK Registered Charity Number: 1141259
- Registered address: University College, High Street, Oxford OX1 4BH



Two things you can do for Univ: one of those is to give, even a small amount, and stand up and be counted; and the second thing everybody can do is put Univ in their will. It costs nothing and I think it’s one of the easiest ways to make a real difference.



William Reeve
(1991, Engineering,
Economics & Management)



GET IN TOUCH

We are here to help. If you have any questions about your legacy gift to Univ, our legacies team would be pleased to talk with you.

legacies@univ.ox.ac.uk

Or call:

Martha Cass

*Senior Philanthropy Manager and
Head of Campaign*

Office: +44 (0)1865 276 958

M: +44 (0)7387 022 196

Grace Lane

Philanthropy Manager
Office: 44 (0)1865 276 799

University College, Oxford OX1 4BH
www.univ.ox.ac.uk/giving/gifts-in-wills

A large print version of this
brochure is available on request



UNIV
UNIVERSITY COLLEGE OXFORD