

THANK YOU FOR YOUR SUPPORT

University of Bristol
Beacon House
Queens Road
Bristol BS8 1QU

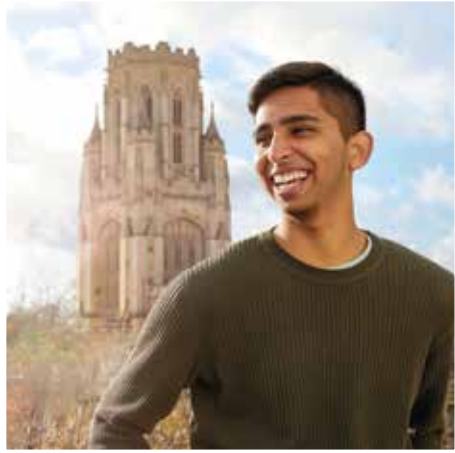
Exempt Charity No. X1121

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**LEAVING
A GIFT IN
YOUR WILL**

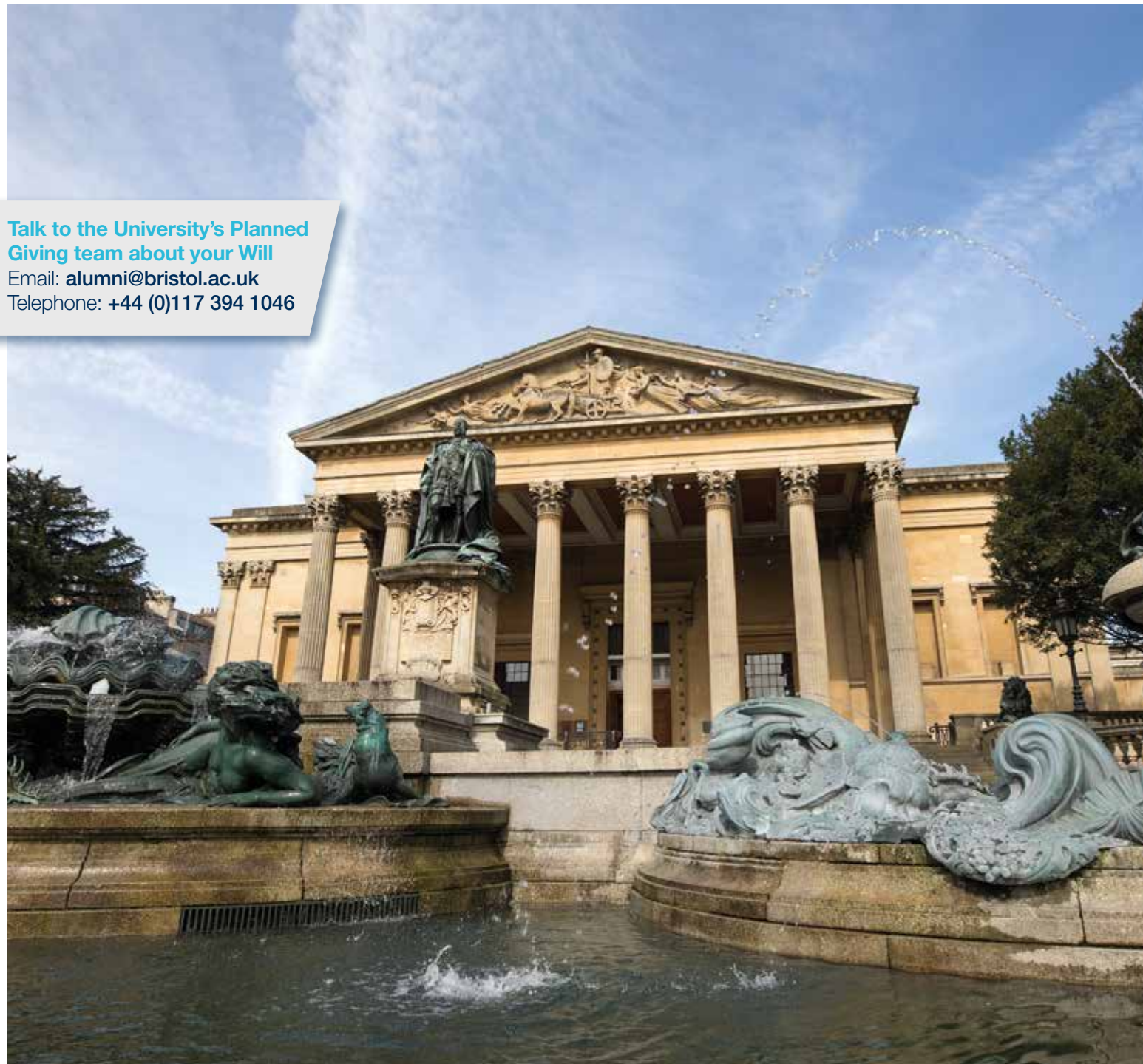


GIFTS IN WILLS AT THE UNIVERSITY OF BRISTOL

Thank you for considering leaving a gift in your Will to the University of Bristol. Legacies are vital to ensure we can continue to offer excellence in education and pursue groundbreaking research well into the future. Much of the work Bristol has done in the past has been made possible by legacies from our generous alumni, friends and staff.

CONTENTS

Legal information	3
Exempt Charity Number	
Official address to include in Will	
Inheritance Tax	
Ways to support	4
Types of legacy gifts	6
Sample Will wording	8
The impact your legacy gift can have	10



Talk to the University's Planned Giving team about your Will

Email: alumni@bristol.ac.uk

Telephone: +44 (0)117 394 1046

LEGAL INFORMATION

The details you need to include in your Will

- The University of Bristol will need to be named as a beneficiary in your Will
- Official University address:
University of Bristol, Beacon House,
Queens Road, Bristol BS8 1QU
- Exempt Charity Number X1121

Gifts in Wills are administered by the Planned Giving team (Global Engagement Division)

Inheritance Tax

If you leave charitable legacies in your Will you may be able to reduce the Inheritance Tax liability of your estate. As the University is an Exempt Charity, gifts to us can generally be free from Inheritance Tax. We recommend that you seek professional advice if you wish to minimise the tax burden on your estate.

Legal advice

Although we cannot offer legal or financial advice, we would be delighted to talk to you about what you would like your eventual gift to achieve. After that, we advise you to consult a solicitor before drafting your Will or updating an existing one. Do get in touch with us using the details below, for the attention of the Planned Giving team.

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WAYS TO SUPPORT THE UNIVERSITY OF BRISTOL THROUGH A GIFT IN YOUR WILL

You may be considering writing – or rewriting – your Will. Alongside ensuring that your loved ones are taken care of, you can contribute to the University of Bristol's future success by including a gift to Bristol in your Will.

Anybody can leave a legacy

This is something that anyone can do, with a gift of whatever value feels possible. One of the most joyful things about the spirit of collective giving is that anybody can leave a legacy to Bristol. We are incredibly grateful for the legacy gifts, both large and small, that we receive. All gifts help support the future of our University and keep Bristol a brilliant place to be for our students and researchers.

You can of course leave a gift for a particular area or purpose, such as

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supporting students in financial need; libraries and laboratories; a department or specific field of study; an area of research or a professorship or PhD scholarships. You can also leave your gift in memory of someone, and we are always happy to discuss options with you. But perhaps the greatest legacy you can leave is to



request that your gift be **unrestricted**, so it can be used to support an area of greatest need at the time of its receipt. As the University is constantly evolving to keep pace with our rapidly changing world, its needs and priorities change. Choosing to leave an **unrestricted gift** to support the general purposes of the University will enable implementation of the most pressing priorities at the time.

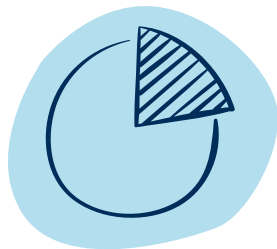
Endowment

If you are interested in leaving a gift to establish an endowment to the University, you might find it helpful to get in touch with the Planned Giving team to discuss your wishes. We can help you clarify what you would like to achieve with your gift. We are ready and waiting to speak to you in confidence.

The University of Bristol continues to have an insatiable quest for knowledge, a determination to be excellent, and a drive to make society a better place for all of us. **You can ensure this vision lives on by making a gift in your Will today.**

TYPES OF LEGACY GIFTS

There are several ways that you can leave a legacy gift to the University. We are always happy to talk to you about the options to best achieve your ultimate wishes.



RESIDUARY

The whole or a specific portion or percentage of an estate left over after making other specified legacies (typically to family members, friends and other charitable causes). This type of legacy has the greatest value and impact as it is inflation proof.



PECUNIARY

The gift of a specific sum of money. It is possible to index link the sum of money in order to preserve its value despite inflation. Your solicitor will be able to advise you on which wording to use to achieve this.



SPECIFIC

The gift of a specific item which might be used by the University as it is (such as fine art or rare books), or which could be sold (property, land, shares, or financial products such as life insurances and pensions), with the proceeds supporting the University. We encourage you to speak to the Planned Giving team in the first instance if you are thinking of leaving specific items.



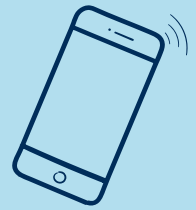
REVERSIONARY

A residuary, pecuniary or specific gift which is left to another beneficiary in the first instance, and which will revert to the University absolutely, usually after the initial beneficiary has died. This is a common type of gift that couples or parents consider, and your solicitor can advise on the benefits of setting this up.



CONTINGENT

A gift dependent upon the occurrence of an event which may or may not happen. For instance, a legacy which only applies if other beneficiaries named in the Will die before the person who made the Will.



GET IN TOUCH

The Planned Giving team would be delighted to chat to you about any queries you have regarding your Will and your wishes for your future legacy. Do get in touch with us on the details below.

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SAMPLE WILL WORDING

The following are examples of Will wording for guidance. Please ask your regional or international solicitor for advice on other geographical areas if you are outside England and Wales, and we recommend that you always consult your solicitor about Will wording. Do get in touch with us, and we can suggest bespoke sample wording for restricted legacies where you want to direct your gift to a specific project or purpose.

Sample wording for an unrestricted legacy of a percentage of your residuary estate

I give... % of the residue of my estate (before the deduction of Inheritance Tax, if any is payable) to the University of Bristol, Beacon House, Queens Road, Bristol, BS8 1QU (Exempt Charity Number X1121) as an unrestricted legacy. It is my wish that it shall be applied for the benefit of said University wherever the University considers the funds could be best used at the time of their receipt. On realisation of the bequest a receipt from the Registrar or other authorised officer shall be sufficient discharge for my Executors.

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Sample wording for an unrestricted gift of a specific sum of money or specific item

I give [the sum of £...] [insert details of specific item] free of tax to the University of Bristol, [insert full address and Exempt Charity Number] as an unrestricted legacy. It is my wish... etc as before.



Sample wording for a restricted legacy of a percentage of your residuary estate

I give... % of the residue of my estate (before the deduction of Inheritance Tax, if any is payable) to the University of Bristol, [insert full address and Exempt Charity Number] to support [insert specific project, direction or purpose of legacy]. If at my death this area is fully funded, or if it is no longer an area in which the University is actively involved, I wish that my gift is used to support activities that are as close as possible to my original intentions at the discretion of the University of Bristol. On realisation of the bequest a receipt from the Registrar or other authorised officer shall be sufficient discharge for my Executors.

Sample wording for a restricted gift of a specific sum of money or specific item

I give [the sum of £...] [insert details of specific item] free of tax to the University of Bristol, [insert full address and charity number] to support [insert specific project, direction or purpose of legacy]. If at my death... etc as before.

In the case of a legacy of a fixed sum of money, you may wish to include the following

The legacy referred to in clause... shall be index-linked, so that the actual amount given shall be the figure which bears the same proportion to the sum stated as the index figure in the Retail Price Index (the 'Index') for the month in which my death occurs bears to the index figure in the Index for the month in which this Will is executed.

THE AMAZING IMPACT THAT LEAVING A GIFT IN A WILL CAN HAVE

A legacy gift of any size has a significant and lasting impact on the University of Bristol's work in education and research. From the sciences to the arts, your support will really make a difference. Read about just some of the ways in which legacies are supporting Bristol.

ENABLING NEW EXPLORATION IN PHYSICS PhDs

'My research in biophysics has implications in diseases such as Alzheimer's and has a massive crossover with medicine. I'm proud to be just one of many researchers who will benefit from legacy gifts left in the name of H H Potter (BSc 1919), which will fund physics PhDs in perpetuity.'

Ellen Carrick (right)
PhD student in Soft Matter



SUPPORTING DISCOVERIES IN ARTS AND CULTURE

'With the help of a bequest from Anthony John Edwards, who studied History at Bristol in the 1950s, the library was able to acquire a very special manuscript fragment, a leaf from the 'Glastonbury Bible' (pictured), probably written in nearby Glastonbury Abbey in the thirteenth century.'

As the leaf shows, medieval scribes turned handwriting and book design into an art form. We are now using it to teach students on our MA in Medieval Studies how to read medieval manuscripts.'

Professor Ad Putter, FBA
Department of English



GIVING BACK AND PLEDGING TO THE FUTURE

'We have pledged an unrestricted gift in our Will to the University of Bristol. We believe in Bristol and so we wanted our gift to be allocated to the greatest area of need, and we encourage others to do the same.'

David and Claire Goddard (below)
Legacy supporters



HELPING UNDERGRADUATE STUDENTS MAKE THE MOST OF BRISTOL

'Donations from unrestricted legacies have a great impact on University of Bristol students, particularly those who may be struggling. A gift in your Will could help a bright student from a disadvantaged background to choose Bristol and thrive during their time here.'

I see firsthand the difference that scholarships can make for undergraduate students and it's wonderful to know that legacies from Bristol alumni and friends are contributing that success.'

Laura Frude (above left with student Omolola Funsho)
Bristol Futures Scholarships Coordinator