



# YORK UNLIMITED

The Campaign for the  
University of York



UNIVERSITY  
*of York*



**A GUIDE TO  
LEAVING A GIFT  
IN YOUR WILL**

# Thank you

Thank you for considering a gift in your will to the University of York. Gifts and legacies of all sizes are helping to transform our University. With your support, we can encourage our talented students and world-class researchers to change the world for the better.

**Together we will make more discoveries and improve lives.**

**Together we will be unlimited.**

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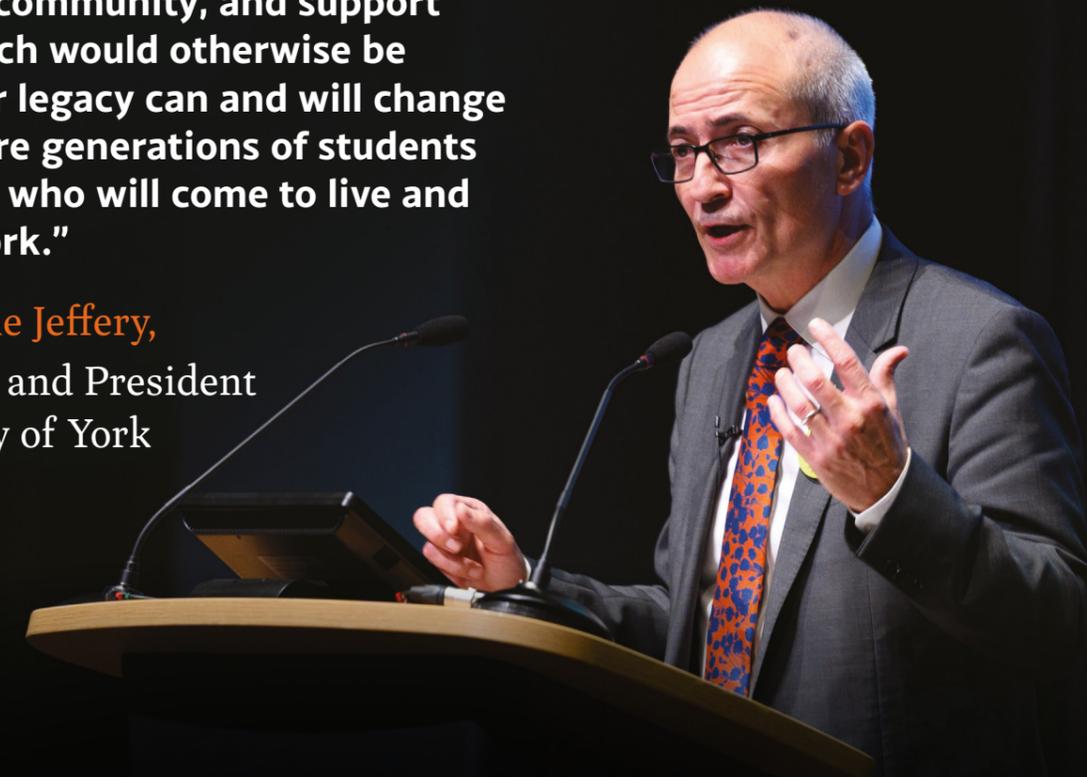
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I am truly humbled by the enduring generosity of the university's philanthropic community. As we look forward, we are committed to ensuring that freedom of exploration, thought and expression is at the centre of our philosophy for teaching and learning. That our research will continue to be driven by curiosity, creativity and innovation. Above all we will be guided by our principles of rigour, integrity, diversity, inclusion, and public good. And our commitment is to act as a community in our shared purpose in pursuit of that public good.

A gift in your will can help shape and drive on our ambitions in teaching and research, strengthen our community, and support endeavours which would otherwise be impossible. Your legacy can and will change the lives of future generations of students and researchers who will come to live and study here at York."

**Professor Charlie Jeffery,**  
Vice-Chancellor and President  
of the University of York



**Understanding the problems of today's world is a challenge; Tackling them is a responsibility. You are the key.**

# Join the HESLINGTON CIRCLE

**W**e are delighted to recognise the generosity of those who pledge their support to the University in their will, through membership of the Heslington Circle. As a member of the Circle you will be invited to an annual reception and other events and be kept informed of developments within the University.



**“**As one of the first undergraduates, I am greatly appreciative of the opportunities that I was afforded and concerned about the costs for present-day students. I would like to think that a modest legacy, combined with some regular giving in the meantime, might go some way to repaying the debt I feel I owe the University and help the present generation of students.”

**David Jennings**, English and Social Science, Heslington Circle Member



**“** I see a university such as ours as a lifeline to the future. The brightest students from all over the world will come to York long after I'm gone to study subjects we haven't yet dreamed of in ways we can't even imagine. It is for these students that I've made a bequest to York in my will.”

**Felicity Riddy**,  
Former Deputy Vice-Chancellor, Heslington Circle Member

# Why a gift in YOUR WILL MATTERS

**Y**ou can make sure that your family and friends are the primary beneficiaries of your will and still make an impact with your legacy gift.

Leaving a gift in your will, large or small, to a charity such as the University of York will make an incredible difference. Just about anyone can give in this way and it is often the greatest donation anyone can make.

A gift in your will can make a lasting contribution for generations - whatever area of the University you are most passionate about supporting.

## HOW YOUR GIFT CAN BE USED

Gifts that allow the flexibility to be used where the need is greatest and are unrestricted, are especially valuable. They allow us to support areas such as:

- Creating a campus for the future
- Ensuring opportunities are open to every student
- Transforming research

Wherever your passions lie, you can choose how your gift will be used to create your lasting legacy.



I look back on my time at York with great affection. For over 15 years I have been trying to give something back. I recently remade my will to share 10% of my estate with York and three other charities. I know this gift will be used to give future generations of students the same wonderful experience I enjoyed."

Jocelyn Abbey, Language, and Linguistics, Heslington Circle Member





# UNLIMITED INNOVATORS

## Creating a campus for the future

**F**rom those early days of college buildings in a green field in Heslington, we have grown to a globally connected community of more than 130,000 alumni, students and staff. We will connect our campus physically and digitally, blending technologies with the physical environment and enhancing the spaces in which our teaching and research takes place.

*You are the key.  
Leave a gift in  
your will.*



**“** We choose to give to the University both as alumni and current staff members because we've seen the impact that it makes to the lives of students receiving scholarships. We also witness some of the exciting things they can do to personally grow and develop through alumni-supported societies. We met at York and so even if we hadn't returned to work here, it's clear the experience would have made a lifelong impact on both of us!”

Sam Bayley, Management  
Charley Bayley, Biology  
Heslington Circle Members



# UNLIMITED AMBITION

Ensuring opportunities  
are open to every student

**T**hrough supporting scholarships you can help students overcome barriers to excel academically and grasp every opportunity offered at the University of York.

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**“** I was extremely fortunate that my job brought me to England, and that the University allowed me to research my D.Phil on a part-time basis over several years. By leaving a legacy gift to the University, I want to open the door for students in science, mathematics, and engineering to study in the USA. I am especially keen to support those who may not have considered looking that far over the horizon. I benefited immensely from my studies at York, and hope to pass on some small portion of that good fortune to generations of students yet to come.”

**Dr Alan Eynon**, Electronics,  
Heslington Circle Member





# UNLIMITED RESEARCHERS

Transforming research

**T**hrough a gift in your will you can drive research either by creating a PhD scholarship or supporting academic researchers to make new discoveries and uncover new opportunities.

*You are the key. Leave a gift in your will.*

## MARIA BOURBOULIS, SOCIOLOGY AND SOCIAL POLICY AND SOCIAL WORK DEPARTMENTS

Having studied Social Work at York, Maria Bourboulis left a legacy gift in her will to support talented postgraduate students in the Department of Sociology or the Department of Social Policy and Social Work.

Originally from Greece, Maria graduated in 1989. She felt strongly that the University gave her a great foundation for the rest of her professional life.

Maria's gift allows many more students to benefit from the opportunities that she had.



The main highlights of my university experience were being awarded this scholarship and receiving an offer letter for my PhD. Both of the stand-out moments of my year are strongly connected to each other, as the scholarship enabled me to focus on my research and to develop further research ideas. Being awarded the Maria Bourboulis Scholarship is a great honour. I am grateful for the financial support, for the precious time I was able to spend studying and engaging in the course, and with the postgraduate community. Thank you for this extraordinary experience!"

*Isabelle Schmuck*, MA in Social Policy and recipient of the Maria Bourboulis scholarship



# The Impact OF LEGACY GIVING

Gifts in wills have helped to transform our university and support our students and researchers.

**Wendy Severs**, Department of Biology

The Cancer Research Unit in the Department of Biology received a gift from the estate of Wendy Severs. This gift will make a difference to solving the complexities of human cancer. Direct donations such as this incur no administrative costs, therefore every penny goes towards the purpose defined by the donor.

**Peter Venables**,  
Department of Psychology

A legacy gift from the estate of Professor Peter H. Venables, founder of the Department of Psychology and former Pro-Vice-Chancellor of the University, has enabled more Psychology students to receive the York Futures scholarships. These scholarships enable undergraduate students to seize career and volunteering opportunities by bridging the gap between student loans and the cost of living.

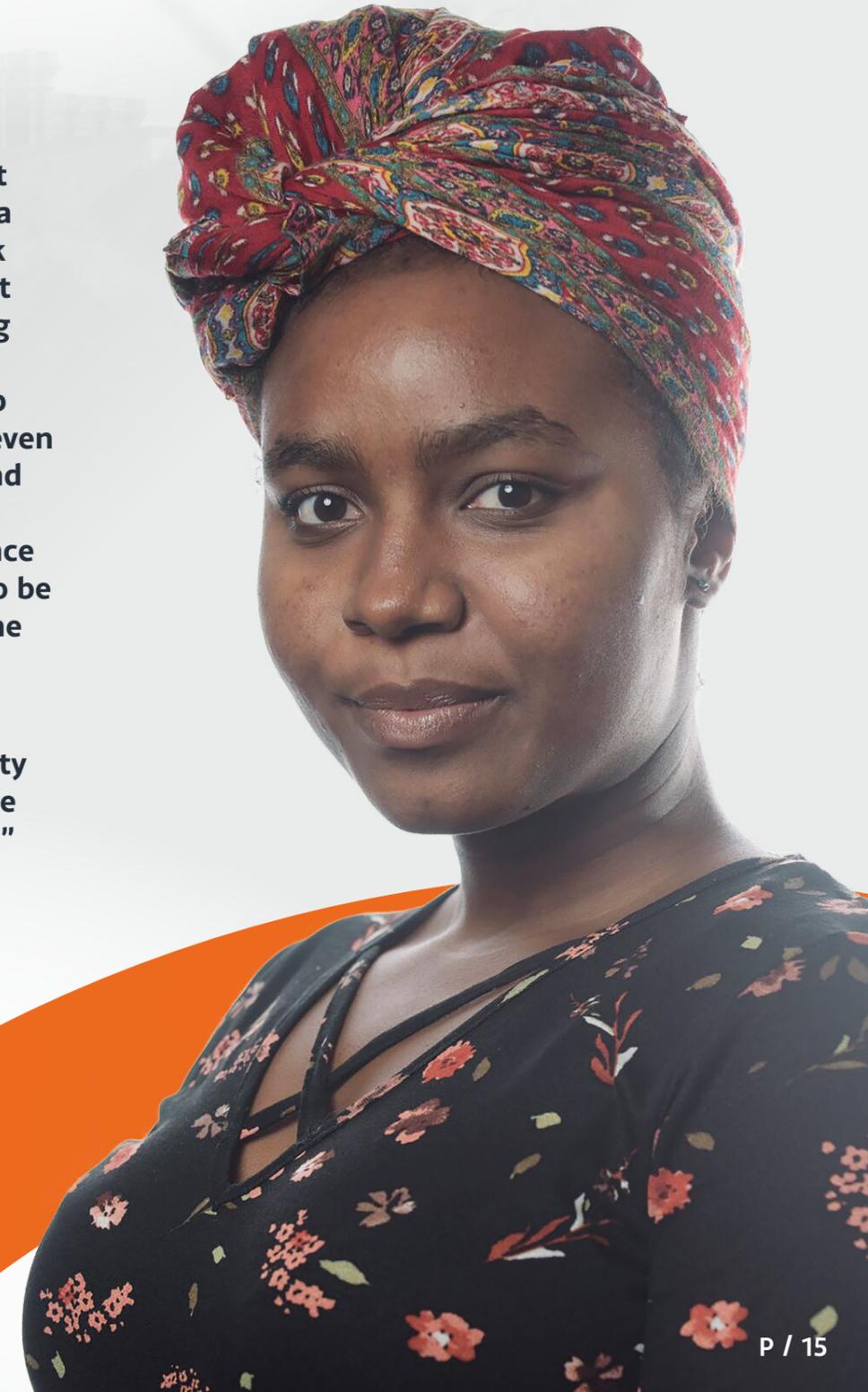
**UNLIMITED INNOVATORS**  
**UNLIMITED RESEARCHERS**  
**UNLIMITED AMBITION**

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“ I would just like to say a huge thank you; the act of donating such a significant sum of your own earnings to help someone you may never even meet is incredibly kind and appreciated. It has really helped boost my experience at university and I hope to be in such a position to do the same in the future.

**Thank you so much for your support. My university experience would not have been the same without it.”**

**Sherry Amponsem**,  
York Futures Scholarship,  
BSc Psychology, Third Year



# Which TYPE OF GIFT?

There are a number of ways in which you can leave a gift in your will.

**Y**our solicitor can advise you on the most appropriate type of gift and the wording of your will. We can provide you with example wording to review with your solicitor.

**These are the most common types of gifts that you can leave in your will:**

## Residuary gift

A percentage of your remaining estate, after fees, outstanding costs and other gifts have been taken care of. The advantage of a residuary legacy gift is that it keeps up with inflation as it is not a fixed sum.

## Pecuniary gift

A fixed sum of money. The value of pecuniary legacies will decrease over time, as the cost of living increases. However, you can link your legacy to the Retail Price Index to ensure that the gift you choose today is worth the same in the future.

## Conditional legacy

This provides for the possibility that if one of your named beneficiaries does not survive you, that part of your estate will be left to the University.

## Pension benefits

Nominating the University as a beneficiary in your pension or SIPP (Self Invested Personal Pension).

## Other gifts

A tax-free gift of land, buildings, personal property (such as antiques or jewellery), shares or securities.

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# Tax Benefits AND OTHER THINGS TO CONSIDER

**United Kingdom:** The University of York is an exempt charity under Schedule 3 of the Charities Act 2011. As such, any gift within your will falls outside of inheritance tax. Giving as part of your will can help to reduce your estate's inheritance tax bill.

If you leave something to charity in your will, then it will not count towards the total taxable value of your estate. This is called leaving a 'charitable legacy'.

You can also cut the Inheritance tax rate on the rest of your estate from 40% to 36%, if you leave at least 10% of your net estate to charity.

**United States:** The University of York in America is a non-profit organisation and a separate legal entity from the University. Donations to the University of York in America are tax-deductible and it is a 501(c)(3) organisation (EIN number: 30-0241333). A bequest to the University of York in America, an organisation exempt from taxes, can reduce your estate tax.

**Canada:** If you are a resident in Canada your bequest could reduce the tax payable on your estate. The University of York has been granted Prescribed University Status with the Canada Revenue Agency.

For information on leaving a gift in your will we recommend that you speak directly with a solicitor or a financial adviser. Should you have any further questions or if you would like to find out how you can support York through a gift in your will, please contact:

**Mary Taylor Lewis,**  
Philanthropy Officer (Legacies)  
mary.taylorlewis@york.ac.uk  
07385430928  
www.york.ac.uk/york-unlimited  
/get-involved/wills/

# Is the University of York **IN YOUR WILL?**

The details of your will are naturally a private matter and we appreciate that you may prefer not to disclose the details to us. However, if you are happy to share your plans, we very much appreciate the opportunity to work with you to agree on how you would like your gift to be used. We will treat any legacy gift in the utmost confidence as requested.

**W**e encourage you to return the enclosed form to our freepost address. This does not commit you in any way, it simply includes us in your current plans and enables us to respond appropriately.

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[www.york.ac.uk/york-unlimited/get-involved/wills/](http://www.york.ac.uk/york-unlimited/get-involved/wills/)



**YORK UNLIMITED**

The Campaign for the University of York

Office of Philanthropic Partnerships and Alumni  
University of York, Heslington, York, YO10 5DD  
United Kingdom +44 (0)1904 321281



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