



INFORMATION FOR UK SUPPORTERS

Please find below information for those writing a will for the first time or updating an existing will. If you already have a will and wish to add St Edmund Hall as a beneficiary, please see the codicil form in this booklet.

BACKGROUND

The College has charitable status as an exempt charity under the Second Schedule to the Charities Act 1993. Our registered charity number is 1137470. Gifts to the College are therefore exempt from inheritance tax and capital gains tax.

Inheritance tax is payable following your death if your estate is worth more than a certain net amount after the deduction of any liabilities. At present, the threshold is £325,000 (or up to £650,000 for married couples or registered civil partners), and anything above that may be taxed at 40%. A gift from you can reduce the amount of any tax payable out of your estate. If you decide to leave 10% or more of your estate to charity the tax payable on the remainder of your estate reduces from 40% to 36%.

The College has the formal title of 'The Principal, Fellows and Scholars of St Edmund Hall in the University of Oxford' and should be so designated in wills and other documents. Those considering making a gift to the College should contact the Development and Alumni Relations Office.

SUGGESTED WORDING

For a Residuary Gift: 'I give the whole (or a share: e.g. one half; one third, or a stated percentage) of the residue of my estate to The Principal, Fellows and Scholars of St Edmund Hall in the University of Oxford'.

For a Cash Gift: 'I give the sum of £ (in figures and words) to The Principal, Fellows and Scholars of St Edmund Hall in the University of Oxford'.

In both cases, there should also be a declaration that 'The receipt of the Principal or other duly authorised officer shall be a full and sufficient discharge to my Executors'.



INFORMATION FOR US AND GLOBAL SUPPORTERS

Please find below information for those writing a will for the first time or updating an existing will. If you already have a will and wish to add St Edmund Hall as a beneficiary, please see the codicil form in this booklet.

US SUPPORTERS

BACKGROUND

In the United States, alumni and friends can take advantage of a number of unique opportunities. Most importantly, you may be able to produce additional lifetime income for yourself or a loved one, reduce your tax liability and pass more money on to your heirs, whilst supporting the Hall.

In order to receive US tax benefits, all gifts, including bequests made to a foreign charity, must be made to an IRS recognized tax-exempt organization. Americans for Oxford, Inc. (AFO) is authorized by the IRS to accept gifts and bequests on behalf of the University of Oxford and its member colleges.

For further information, please contact development.office@seh.ox.ac.uk or visit www.oxford.planyourlegacy.org

SUGGESTED WORDING

For a Residuary Bequest: 'All (or %) of the rest, residue and remainder of my estate which I may own or be entitled to at the time of my death, I give, devise and bequeath to Americans for Oxford for the benefit of The Principal, Fellows and Scholars of St Edmund Hall in the University of Oxford exclusively for its charitable and educational purposes'.

For an Outright Bequest: 'I give and bequeath to Americans for Oxford for the benefit of The Principal, Fellows and Scholars of St Edmund Hall in the University of Oxford the sum of (X) dollars exclusively for its charitable and educational purposes'.

GLOBAL SUPPORTERS

BACKGROUND

A gift from a will to the College may reduce the amount of tax payable from the donor's estate. This varies from country to country so donors should seek advice from solicitors or financial advisors.

SUGGESTED WORDING

For a Residuary Gift: 'I give the whole (or a share: e.g. one half; one third, or a stated percentage) of the residue of my estate to The Principal, Fellows and Scholars of St Edmund Hall in the University of Oxford'.

For a Cash Gift: 'I give the sum of £ (in figures and words) to The Principal, Fellows and Scholars of St Edmund Hall in the University of Oxford'.

There should also be a declaration that 'The receipt of the Principal or other duly authorised officer shall be a full and sufficient discharge to my Executors'.