

# PLANNED GIVING TO SUPPORT THE UNIVERSITY OF BRISTOL FOUNDATION



**Andrew Monk**  
Executive Director  
of Global Engagement

Thank you for considering a planned gift to the University of Bristol Foundation Inc. Gifts like these are vital to ensure we can continue to offer excellence in education and pursue groundbreaking research well into the future. Much of the work the Foundation has supported at Bristol in the past has been made possible by planned gifts from our generous alumni, friends and staff, from all across the globe including North America.

There are many areas you could support with your planned gift, or, like me, you can request that your gift be unrestricted and used to

support an area of greatest need at the time of its receipt. I found it really helpful to talk through my thoughts with Nicola and our Planned Giving team, to clarify what I wanted to achieve with my gift. Nicola is ready and waiting to speak to you in confidence, and without commitment. The Foundation in partnership with the University of Bristol continues to have an insatiable quest for knowledge and a drive to make society a better place for all of us. You can ensure this vision lives on by choosing to support us today.

**THANK YOU  
FOR YOUR  
SUPPORT**

# WAYS TO SUPPORT THE UNIVERSITY OF BRISTOL FOUNDATION 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 our future success by including a bequest in your Will.

### Anybody can leave a bequest

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 bequest to Bristol, with a gift of whatever value feels possible. We are incredibly grateful for the 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 **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.



## TYPES OF PLANNED GIFT

There are several ways that you can leave a planned gift to the University of Bristol Foundation Inc. We are always happy to talk to you about the options to best achieve your ultimate wishes. We encourage you to speak to your legal or financial planner in the first instance if you are thinking of any of these planned gifts.

### RESIDUARY BEQUEST

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

### PECUNIARY BEQUEST

The gift of a specific sum of money. It is possible to preserve the value of your gift despite inflation. Your lawyer will be able to advise you on which wording to use to achieve this.

### SPECIFIC BEQUEST

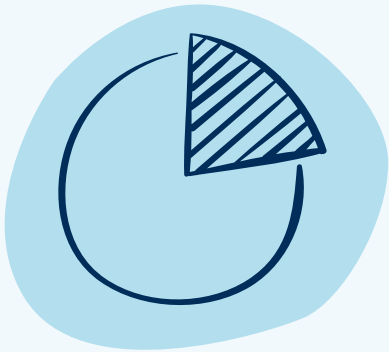
The gift of a specific item which might be used as it is (such as fine art or rare books), or which could be sold (property, land, or shares). We encourage you to speak to the Planned Giving team in the first instance if you are thinking of leaving specific items.

### CHARITABLE GIFT ANNUITY

You can purchase a Charitable Gift Annuity which will benefit you during life with the remainder going to the University of Bristol Foundation Inc. You should consult with your financial adviser on options available.

### CHARITABLE LEAD TRUST

Arrange an income for the Foundation with the remainder designated to you or someone else.



### CHARITABLE REMAINDER TRUST

Arrange an income for yourself or a loved one now with the remainder designated to the University of Bristol Foundation Inc.

### IRA ROLLOVER

This is a gift of your Required Minimum Distribution (RMD) amount designated directly from your IRA plan to the University of Bristol Foundation Inc.

### 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 planned gift. Do get in touch with us on the details below.

Email: [nicola.giblin@bristol.ac.uk](mailto:nicola.giblin@bristol.ac.uk)  
Telephone: **+44 (0)117 455 1832**



## SAMPLE WILL WORDING

**We recommend that you always consult your lawyer about Will wording. If you get in touch with us we can suggest bespoke sample wording for restricted bequests, where you want to direct your gift to a specific project or purpose, which your lawyer can then advise on.**

I bequeath to the University of Bristol Foundation Inc, which is tax exempt under Section 501 (c)(3) of the US Internal Revenue Code and a United States Corporation organized in Massachusetts (EIN 04-3129036) with the business address of 1350 Avenue of the Americas, Floor 2, Suite 266, New York NY 10019 the sum of (the sum of \$...) / (...% of my estate) / (residue of my estate) to be used exclusively for charitable purposes. However, if the University of Bristol Foundation Inc is not a 501 (c)(3) tax exempt organisation, then to the University of Bristol, Exempt Charity Number X1121.

### You may then like to add:

It is my hope that these funds will be utilized for the support of...  
(a specific purpose or general area can be inserted here).

**Talk to Nicola Giblin, Planned Giving Manager, about your planned gift**  
Email: [nicola.giblin@bristol.ac.uk](mailto:nicola.giblin@bristol.ac.uk)  
Telephone: **+44 (0)117 455 1832**





## LEGAL INFORMATION

### The details you need to include in your Will

- The University of Bristol Foundation Inc will need to be named as a beneficiary of these gifts.
- Official University of Bristol Foundation Inc address:  
**University of Bristol Foundation Inc**  
**1350 Avenue of the Americas**  
**Floor 2, Suite 266**  
**New York, NY 10019**
- The University of Bristol Foundation Inc is tax exempt under Section 501 (c)(3) of the US Internal Revenue Code, and a United States Corporation organized in Massachusetts.
- EIN 04-3129036

### 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, you should take the advice of legal and tax experts before making a planned gift. Do get in touch with us using the details below.

**Talk to Nicola Giblin, Planned Giving Manager, about your planned gift**

Email: [nicola.giblin@bristol.ac.uk](mailto:nicola.giblin@bristol.ac.uk)  
Telephone: +44 (0)117 455 1832

## THE AMAZING IMPACT THAT LEAVING A BEQUEST CAN HAVE

A bequest 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.

### BEQUEST ENABLES 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 bequests left in the name of H H Potter (BSc 1919), which will fund physics PhDs in perpetuity.'

**Ellen Carrick**

PhD student in Soft Matter

### GIVING BACK AND PLEDGING TO THE FUTURE



'I was an undergraduate at the University of Michigan and had the opportunity to take a year of study abroad. I chose the University of Bristol, where I took courses in History, Political Science and Economics. The experience changed my life in so many positive ways and I still think fondly of my time there. I have seen the University of Bristol change and grow and give so much to society. My wish is that my bequest will be a way of giving back and saying 'thank you' for my great Bristol experience.'

**Dr Kate Hecht** (1966),

Expert in Education Research and Programme Evaluation