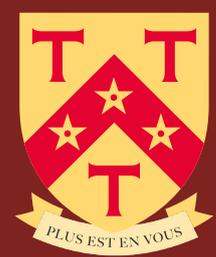


# LEGACY GIVING AT ST ANTONY'S

Shaping a global future



St Antony's  
College  
UNIVERSITY OF OXFORD



## A message from the Warden

Over the centuries, legacies and gifts (large and small) have been instrumental in enabling schools, colleges and universities to develop and flourish.

Indeed, St Antony's owes its very existence to a generous gift that enabled it to create a welcoming, intellectually-stimulating, truly international and multicultural environment where our students thrive. We are committed to sustaining our position as a global leading centre for the study of modern history, international relations, economics, development studies, politics, and anthropology, and to continue to provide opportunities for talented and highly motivated students from around the world, regardless of their background or financial circumstances, for generations to come. Leaving a legacy or a planned gift to St Antony's is therefore one of the most meaningful investments into our College's future.

With that in mind, nominating 'General Charitable Purposes' Endowment' as the designation for your gift will protect St Antony's financial future, and give the College's Governing Body flexibility to direct the funds to the areas in greatest need of support. St Antony's income comes from a number of sources, including conferences and summer schools, donations, and, critically, the annual return from its endowment. A strong endowment serves as an independent source of income, which underpins the College's financial security, and legacies play a vital part in that objective. By making a bequest in support of the College's endowment, you will directly contribute to St Antony's future and guarantee its financial security and independence in perpetuity. If, on the other hand, you would prefer to support the College's 'sinking' Greatest Need Fund, nominating 'General Charitable Purposes' as the designation for your gift would allow the College to fund the areas of greatest need as they arise. To this end, you can support any aspect of College life with which you have a particular affinity.

Either way, every legacy gift, of any size, makes a huge difference to the College's everyday life. Whether an endowment gift, or a donation for the here and now, all legacy gifts have a lasting impact.

For the first time in the University of Oxford's history, the institution now has more graduate students than undergraduates, and the quality of the institution's research is recognised and celebrated across the world. This, of course, is a wonderful testament to the University and its Colleges. However, many of those offered places at Oxford have to decline their offers due to financial reasons, and provision for academic and extracurricular support in general is far from sufficient.

Your generous support will help us to continue our Founder's legacy, and ensure that St Antony's will be able to continue to provide a world-class education while preserving its core values in perpetuity.

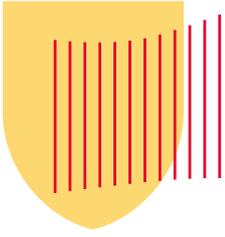
We are enormously grateful to everyone who remembers St Antony's in their Will. If you, too, are considering supporting the College in this way, and thereby joining me and many others who have done so already, we would be delighted to hear from you.

Thank you, as ever, for your support.

A handwritten signature in blue ink that reads "Roger Goodman". The signature is written in a cursive style and is followed by a horizontal line that tapers to a point on the right.

**Professor Roger Goodman CBE**

Warden of St Antony's  
College



## Leaving a gift in your Will

It is simple to include a legacy to the College in your Will. It can be done at the time when you make your Will, or, if you have already drawn up a Will, you can revise it when you next update it.

There are two most common types of legacies:

**A Residuary Legacy**, which enables legators to leave the College all of their estate, or a percentage of it after all other beneficiaries have been paid. This type of legacy ensures that the value of the legator's gift is unaffected by inflation and evolves in line with the value of their estate.

**A Pecuniary Legacy**, which allows legators to leave the College a fixed sum of money, the value of which may decrease over time.

If you choose to remember the College in your Will, please let us know by emailing [alumni.office@sant.ox.ac.uk](mailto:alumni.office@sant.ox.ac.uk) so that we can ensure that all aspects of your plans are fully understood and so that we can acknowledge your generosity appropriately.

For substantial legacies, naming opportunities may also be available, and we would be delighted to arrange a confidential call or a meeting with you to discuss the details.

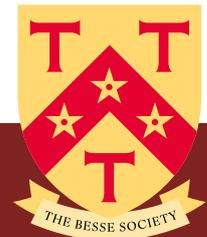
We recommend that when drafting and concluding your Will, you discuss your plans with your family and legal professionals with expertise in the area.

### Contact the Development Office

[www.sant.ox.ac.uk](http://www.sant.ox.ac.uk)

+44(0)1865 284700

[alumni.office@sant.ox.ac.uk](mailto:alumni.office@sant.ox.ac.uk)



## The Besse Society

The Besse Society recognises donors who have made bequests to the College. It bears the name of the College's Founder – and its first ever Benefactor. Members will receive the Society's lapel pin badge and be invited to exclusive members-only events. Please contact the Development Office for more information.



## Tax-efficient giving

### UK

St Antony's College is a registered charity (number 1141293), and as such, legacy gifts to the College are exempt from both inheritance and capital gains tax in the UK. Additionally, if you leave charitable gifts in your Will that amount to 10% or more of your chargeable net estate, the inheritance tax rate on the estate may be reduced from 40% to 36%. Please consult your financial adviser, who will be able to discuss your personal situation.

### USA

Planned giving tax benefits apply to bequests made by our supporters who are US taxpayers. If you would like to know more about leaving a bequest from the USA, please contact the Development Office.

### Canada

The University of Oxford and its Colleges are deemed to be a 'prescribed University outside Canada' by the Canada Revenue Agency. This status allows individuals and trusts to claim a non-refundable tax credit for Canadian income tax purposes in respect of donations made to St Antony's College. The bequest will result in a tax credit on your final income tax return.

### Germany

Legacy gifts made via German Friends of Oxford University are treated in the same way as lifetime donations for the purposes of inheritance and gift tax in Germany. If you are a German taxpayer and wish to leave a gift in your Will to St Antony's College, please contact the organisation's Chair, Dr J Willisch, at [germtax@gmail.com](mailto:germtax@gmail.com). For details, please scan this QR code.



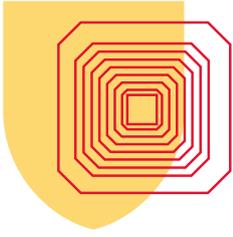
### Switzerland

As of January 2023, a major update to Swiss inheritance law has liberalised the 'forced heirship' rules and thus has made it easier for Swiss citizens and Swiss residents to make testamentary dispositions under Swiss law to remember charities such as Swiss Friends of Oxford University in their Wills. If you are a Swiss taxpayer and wish to leave a gift in your Will to St Antony's College, please scan this QR code.



### Other parts of the World

There could also be tax benefits associated with legacies made by taxpayers in other countries. If you are a taxpayer outside the regions listed here, please contact the Development Office to discuss the options.



## Suggested wording for your Will

Whether making a new Will or amending your existing one, please consult your legal adviser. The Development Office can offer additional guidance.

### In the UK

#### *A Pecuniary Gift*

'I give the sum of £ \_\_\_\_\_ (in figures and words) to St Antony's College in the University of Oxford (Registered Charity No. 1141293), to be used for its General Charitable Purposes' Endowment / General Charitable Purposes / a specific project (name/description). I declare that the receipt of the Warden or other duly authorised officer shall be a full and sufficient discharge of my Executors.'

#### *A Residuary Gift*

'I give the whole (or a \_\_\_\_\_ share) of the residue of my estate to St Antony's College in the University of Oxford (Registered Charity No. 1141293), to be used for its General Charitable Purposes' Endowment / General Charitable Purposes / a specific project (name/ description). I declare that the receipt of the Warden or other duly authorised officer shall be a full and sufficient discharge of my Executors.'

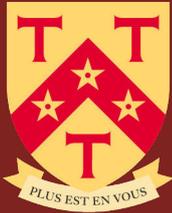
### In the USA

'I give (\$\_\_\_/\_\_\_% / all of the residue of my estate) to Americans for Oxford, Inc. (AFO), an independent 501(c)(3) tax-exempt entity recognised by the U.S. Internal Revenue Service, with the recommendation for it to benefit St Antony's College in the University of Oxford, Great Britain (For project-specific bequests, please state the details here.)'

### Other parts of the World

Please contact the Development Office to discuss the options.





# St Antony's College

UNIVERSITY OF OXFORD

Registered Charity Number: 1141293  
Main Charity Name: St Antony's  
College in the University of Oxford

Development Office  
St Antony's College  
62 Woodstock Road  
Oxford  
OX2 6JF  
Great  
Britain

[www.sant.ox.ac.uk](http://www.sant.ox.ac.uk)

+44(0)1865 284700

[alumni.office@sant.ox.ac.uk](mailto:alumni.office@sant.ox.ac.uk)

k



Registered with  
**FUNDRAISING  
REGULATOR**

