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SOCIETY



YOUR LEGACY



Investing in the future



UNIVERSITY OF
PLYMOUTH



A NOTE OF THANKS FROM OUR VICE-CHANCELLOR

I want to thank you for considering supporting the University of Plymouth in this special and lasting way. A legacy is a sign of an exceptional relationship with the University, and I am delighted to welcome you into a close circle of supporters and friends.

Gifts through legacies make so much possible at the University. Ever since the founding of the University in 1862, gifts in Wills have provided a source of vital funds – supporting students, medical research, and the very buildings themselves.

The University of Plymouth transforms lives through its education and research, and your generosity will help to ensure that this tradition continues.

Thank you for the important role that you are playing at the University of Plymouth.

Professor Judith Petts CBE, Vice-Chancellor

1. and 2. Plymouth School of Navigation, formed in 1862

3. Our £19m Marine Building, home to the COAST Laboratory

4. Spectacular graduation ceremonies, held on Plymouth's historic Hoe

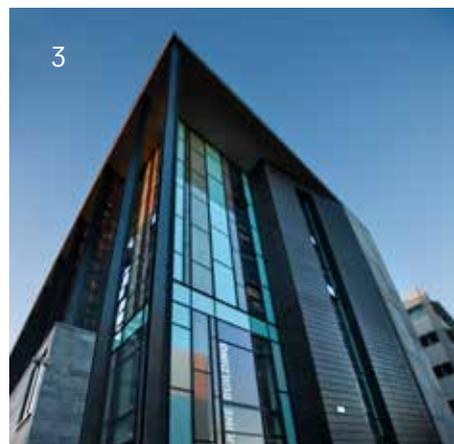
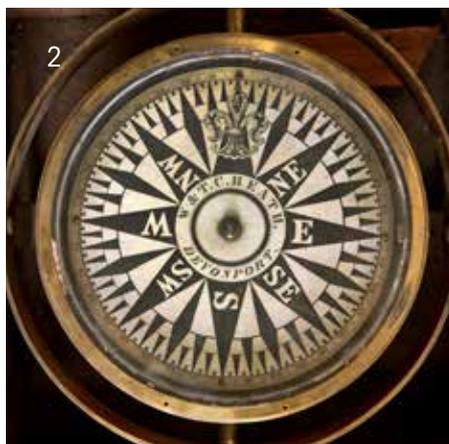
5. Our prestigious Derriford Research Facility, opened by HRH The Princess Royal in 2018. The new headquarters of the Institute of Translational and Stratified Medicine.

6. Smeaton's Tower on Plymouth Hoe

LEAVING A LEGACY

For many people, a gift in your Will is a way to make a significant and lasting contribution. It may cost nothing in your lifetime, yet provide much satisfaction and peace of mind.

As the University of Plymouth is a registered charity, a legacy will normally reduce the tax payable on your estate.





“Receiving an engineering scholarship has really boosted my confidence, I’ve noticed a difference in my leadership abilities and I feel ready to go out of my comfort zone.”

Lisa Jacob, MEng Civil Engineering

TYPES OF LEGACY

Amending your Will to include a legacy gift is simple, although we always recommend that you seek advice from a solicitor.

Here is some suggested wording to use, depending on the type of gift you want to leave. We have also included a Codicil form in this booklet, which can be added to an existing Will.

1. Leave a share of your estate

A **residuary legacy** is a gift of all or a specified percentage of your estate after expenses and all other gifts have been taken care of. The benefit of a residuary bequest is the real value it retains, regardless of inflation.

One suggested wording: I give to the University of Plymouth, charity number XN80875, all (or a percentage or share) of my residuary estate to be used to support (area of your choice or where the need is greatest).

I declare that the receipt of the Registrar and Secretary or other authorised officer for the time being of the University shall be good and sufficient discharge to my Executors.

2. Leave a specific amount

A **pecuniary legacy** is a gift of a fixed sum of money. This fixed amount legacy is very welcome, however, the disadvantage is that the value of the donation does decrease over time.

Wording: I give to the University of Plymouth, charity number XN80875 the sum of (in figures and words) £ _____ free from all taxes and duties, to be applied to (the area of your choice or where the need is greatest).

I declare that the receipt of the Registrar and Secretary or other authorised officer for the time being of the University shall be good and sufficient discharge to my Executors.

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EVERYONE WHO MAKES A PLEDGE IN THEIR WILL IS INVITED TO JOIN THE 1862 SOCIETY

We would like to recognise and thank everyone who chooses to remember the University by pledging a legacy. We recognise that leaving a gift in your Will is a personal decision, but if you choose to inform us of your intentions you will be invited to join the 1862 Society, named after the founding year of the University.

As a member of our 1862 Society, you are a friend of the University. As such we will send you updates from the University as well as inviting you to special events including our graduation ceremonies.

The difference you can make

Leaving a donation to the University of Plymouth allows us to support the area of greatest need now and in the future. However, you may have a particular area you wish your legacy to support.

We are happy to discuss this with you and have included some options below:

- 1. Support teaching and research in a particular faculty or school:**
 - Arts and Humanities
 - Health and Human Sciences
 - Science and Engineering
 - Business
 - Medicine and Dentistry
- 2. Support students through bursaries and scholarships**
- 3. Support world-leading medical research**
- 4. Support the University Library**



“Over the years, each time I have visited this Medical School I come away uplifted and also reassured that there are, in this difficult world, people of such vision, determination and skill who are making this contribution to science, medicine and dentistry and, all importantly, training and passing on their values and wisdom to the coming generation of professionals.

I think the future of the developing generations is safe in these hands.

Even if I only help in a small way, that is what I would like to do by leaving a legacy gift to the Medical School.”

Nicola Davies, Legacy Pledger and Member of 1862 Society



“As an alumnus of Plymouth, the University holds a special place in my heart. A legacy will ensure that the brightest and best students can benefit from the University of Plymouth’s first-class teaching, whatever their circumstances, by providing scholarships, grants and awards for academic excellence. A gift in my Will means I can have a transformative impact on the students and staff for generations to come.”

Mark Taylor, Legacy Pledger and Member of 1862 Society



MAKING AN ADDITION TO AN EXISTING WILL

We've provided a form here that you can complete and then send on to your solicitor. Two people should witness your signature, neither of whom should be related to you or mentioned in your Will. It is also recommended that the witnesses are not members of staff at the University of Plymouth.

Please send on to whoever holds your Will, for them to store along with your Will.

Image: Davy Building, 1967



Codicil form

NAME (in full):

ADDRESS

POSTCODE

I DECLARE THIS TO BE A CODICIL OF MY WILL, (date in words)

WHICH IS LOGGED WITH (name of solicitor/bank)

In addition to any legacies given in my said Will, I give to the University of Plymouth, Drake Circus, Plymouth (a charity and a company limited by guarantee, registration number XN80875) the sum of (in numbers and words)

£

Or a ____% share of my residuary estate, to be used in the area of: greatest need (or please state specific area)

Signed

Date

As Codicil of his/her Will

Witnessed by the following persons who have signed their names in the presence of each other and or the person named above:

1. Name

Occupation

Address

Signed

Date

2. Name

Occupation

Address

Signed

Date

DATA PROTECTION

We take your privacy very seriously. We will use your data to administer your pledge. For full details on how we use your data, please see our privacy policy here: www.plymouth.ac.uk/data-protection



LEGACY GIFT PLEDGE

Thank you for remembering the University of Plymouth and joining the 1862 Society. By declaring your intentions to us, you allow the University a degree of forward planning. This does not commit you to a particular course of action or limit your freedom to change your Will at any time.

To find out more or tell us about an existing legacy, please complete the form below and return to:

FREEPOST RTHY-YEKH-ZTGK, Development Office, 101 Hepworth House, University of Plymouth, Drake Circus, Plymouth, PL4 8AA

Legacy gift pledge form

YOUR NAME

ADDRESS

POSTCODE

COUNTRY

Email address

Dates of your study at the University of Plymouth

Course name

I am considering including the University of Plymouth in my Will and wish to speak to a member of staff

Telephone number

Best time to call

I have already included the University of Plymouth in my Will

If you are happy to, please inform us of your intentions using the space below

I would like to direct my gift to:

I wish for my gift to remain anonymous

DATA PROTECTION

We take your privacy very seriously. We will use your data to administer your pledge. For full details on how we use your data, please see our privacy policy here: www.plymouth.ac.uk/data-protection



SOCIETY

We hope you are inspired to invest in our future as we continue to drive the change we want to see in the world, as we have been trusted to do since 1862.

Whatever your reason for wanting to support the University of Plymouth, we would be delighted to hear from you and discuss your wishes. Please do contact us to discuss leaving a legacy, areas of the University you would like to support, or naming and recognition opportunities.

CONTACT US

 www.plymouth.ac.uk/giving

@ giving@plymouth.ac.uk

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