



**St Anne's
College**
University of Oxford



Your legacy to St Anne's:
Leaving a lasting impact



Many of our alumnae want to recognise the positive impact of their time at St Anne's on their lives, and the opportunities it afforded them. One way of doing this is by choosing to leave a gift in your will - one of the most personalised ways you can support your College.

Since our earliest days, legacies have made a vital contribution to students at St Anne's College, with the support of earlier generations creating an enduring foundation for the success of future students. Without the legacy of Amy Hartland, the now-iconic Hartland House, our first purpose-built building, would not exist. More recently, bequests to St Anne's have accounted for more than half the income donated to the College over the last decade. Between 2014 and 2020, close to £4.8m was received in legacy gifts, financially supporting undergraduates and postgraduates, endowing teaching posts, and contributing to our library and other building projects. Each bequest, however big or small, makes a lasting impact.

By leaving a gift to St Anne's in your will, you help to provide a range of opportunities for students and the wider college community, securing our future for generations to come. Because St Anne's is a registered charity, there are also considerable tax benefits to leaving bequests to us.

Should you want to leave us something in your will, we hope that this brochure gives you the information you need to proceed but, if you have questions or would like to discuss a particular area of support, we would be delighted to help you find out more about how to plan your gift to St Anne's.

We recognise that you may prefer not to tell us your intentions, but if you let us know your wishes, you will automatically become a member of the Plumer Society which was founded to recognise and thank those generous alumnae and friends who have chosen to remember the College in their will. You can read more here: <https://www.st-annes.ox.ac.uk/alumnae/our-alumnae/remembering-st-annes-in-your-will/>

Edwin Drummond
Director of Development

Why do I need a will?

No matter how old you are, having a will is important. By signing a will, you make things a lot easier for your family. You can use your will to determine who should be responsible for your estate administration and where property and assets will go in the future, as well as helping your family to understand things such as your funeral wishes and your intentions for any children.

Signing your will means you decide what happens

If you pass away without signing a will you are *intestate*, which means your estate may not be distributed as you would want.



Why leave a legacy to St Anne's?

Your legacy gift gives you the chance to:



leave a lasting impression on your College and its buildings



educate tomorrow's brightest minds



remove financial barriers for the most talented students



support world-leading teaching and research to help us understand the world and change it for the better



give something back to the community of St Anne's

Gifts to charities such as St Anne's are exempt from Inheritance Tax

All legacies and bequests to the College are free of UK Inheritance Tax, by virtue of the College's charitable status. The inheritance tax threshold for your whole estate is reduced from 40% to 36% if you choose to leave 10% or more of your estate to charity. (We recommend that you seek your own tax/estate planning advice.)

When you have made arrangements for your family and friends, we would be most grateful if you might consider remembering St Anne's in your will.

Why I chose to include St Anne's in my will

My husband and I wrote our wills in 2021 when we moved house. It was our third house and we already had four children, but we finally felt ready to do proper grown-uping. I wanted to make sure that our children would be provided for (or maybe their children – I plan to live a long time!) but also to give something back to a place that I love and which gave so much to me. I studied at St Anne's for four years, and went back to work there in my mid-twenties for another five. The wonderful people who make up St Anne's supported me growing up, and helped me become the person I am now. While I'd love to be able to thank them all individually, from Brendan the night porter to Baroness Ruth Deech, I feel that giving back to St Anne's the institution is a way to do that. I already give a regular monthly gift but leaving a legacy to College allows me to give more than I can afford at any one time. A good friend once taught me the concept of paying it forward, and giving to College is just that – enabling future generations of students to experience the wonderfulness of St Anne's.



Ele Crichton (Hunter) 1996

How your legacy could make a difference:



After reading Chemistry at St Anne's, **Pauline Enticknap (Meadow), 1948** had an illustrious career in academia, researching and teaching including at Guy's Hospital Medical School in London, University College Hospital (UCH) Medical School and University College, London. She was Editor in Chief of the Journal of General Microbiology, the first woman to hold this office; and served on the boards of various hospitals and health authorities.

Shortly after Pauline passed away aged 91 in 2021, her stepson Alasdair got in touch to let us know that Pauline had left money to three charities in her will, including an extremely generous £100,000 to St Anne's. Pauline had never given to St Anne's in her lifetime, and never mentioned her plans to give anything to the College in her will, so this news was a total surprise – albeit a very welcome one! Sadly, we didn't have the opportunity to talk to her about her wishes or to thank her in person for her generosity.

We encourage people where possible to make unrestricted gifts so that we can put them towards our area of greatest need at the time, and Pauline chose to do this. We put many of our legacy gifts to student support, but the family felt that Pauline would want to support something permanent on which she could make a real mark. So with their agreement, we decided to put the donation towards our Bevington Road regeneration project. This regeneration will be St Anne's biggest ever capital campaign and Pauline's gift will make a real difference to our ability to deliver this project, providing beautiful but robust homes away from home for our students, for generations to come. For more info about this campaign, please see www.transformingbevingtonroad.co.uk.

Rosemary Pountney left a legacy to St Anne's which allowed us to fund the Rosemary Pountney Junior Research Fellowship. The most recent postholder, Hannah Simpson, writes:

"The Fellowship allowed me to continue my work on three main theatre research projects. The first is a monograph on the staging of physical pain by post-WWII Francophone playwrights. The second is a monograph on Samuel Beckett and contemporary disability performance. The third is a new project, looking at the forgotten or 'unexpected' plays of modernist authors we more typically consider novelists: Virginia Woolf, E. M. Forster, George Orwell, Flann O'Brien, James Joyce, and Elizabeth Bowen. As an early-career researcher in the present job market, the opportunity to work on these large-scale projects is invaluable. At a moment when we're seeing English and Theatre departments cut across the country, to the detriment of students and scholarship alike, the Rosemary Pountney Fellowship testifies to the value of continued and properly supported theatre research and teaching."





Thanking you for your *generosity*

Wherever possible and in accordance with your wishes, St Anne's would like to acknowledge the generosity of your bequest. Fellowships, bursaries, scholarships and physical spaces could be named in recognition of your gift. We would be pleased to discuss options with you.

The Plumer Society

If we know that you plan to give us something in your will, you will automatically become part of our Plumer Society (unless you let us know that you prefer not to be). We hold regular events available exclusively or with priority access to Plumer Society members, to give us plenty of opportunities to say thank you to you for your generosity.

The Ship

We also like to include the names of our legators in *The Ship* (with permission) as both a thank you and an opportunity to encourage others to consider us in this way.

FAQs

I would like to leave a gift to St Anne's in my will.

What wording should I use?

We suggest keeping your wording as broad as possible to ensure that we can use it in the way it is needed most at the relevant time.

"I give the whole or a %..... share of the residue of my estate/or free of tax the sum of £..... (in figures and words) to St Anne's College in the University of Oxford (Charity No. 1142660), to be used for its general charitable purposes or a specific project* and I declare that the receipt of the Principal or other duly authorised officer shall be a full and sufficient discharge of my Executors."*

* Delete as appropriate

What is a residuary legacy?

A **Residuary** legacy is a gift of all or part of your net estate (what remains after all taxes, specific gifts and the cost of administering the estate have been paid). This type of legacy should be expressed as a percentage or share of your estate. As an example, a legator in 2021 left 20% of the residuary value of her estate to St Anne's, which amounted to £114,416.

A **Specific** legacy is the gift of a specific item or asset such as shares or jewellery.

A **Pecuniary** legacy is a fixed sum of money. It is worth bearing in mind that inflation can reduce the value of pecuniary legacies over time, so it is worth reviewing your will on a regular basis, whether or not your circumstances change. As an example, in 2021 a legator left St Anne's a fixed sum of £12,000.





Your **estate** is everything that you own, including your house, money and any life insurance policies that will be paid on your death.

Executors are the people chosen by you to carry out the instructions contained in your will.

What if I want to give to something specific?

Generally, we encourage unrestricted giving so that we can be sure that no matter when the time comes (be it in 5 or 50 years), your gift can be used to support our area of greatest need. If you have something specific in mind, we would encourage you to talk to us about this, as we want to be sure that in the future, the College will be able to honour your wishes. Even if you do have something specific in mind, we suggest that you try to keep your wording as broad as possible to ensure that we can direct your legacy as you wish.

What if I don't live in the UK?

There are a number of options for people to make provision in their wills outside of the UK.

US alumnae can leave a gift in their will using the same wording as above, but should include 'St Anne's College in the University of Oxford, UK' as the beneficiary. US tax payers can also receive Estate tax deductions by making a Legacy gift through the University of Oxford North American Office, Americans for Oxford - <https://www.oxfordna.org/giving/americans-for-oxford>.

Alumnae based in **Hong Kong and China** who want to give to St Anne's, either in their will or during their lifetime, can do so via the Oxford China Office - <https://www.oxfordchina.org/>. Please state clearly that your gift is for St Anne's College.

Swiss alumnae wanting to leave a gift in their will can do so tax-free via the Swiss Friends of Oxford University - <https://oxfordfriends.ch/>.

For more information or for international giving in other countries, please just get in touch so that we can point you in the right direction. (See below for details.)

What if I have already made a will, but want to add St Anne's onto it?

You can fill in a codicil form – either just let us know or talk to your solicitor about how to do this.

What is a Deed of Variation?

If you are a beneficiary of a will, you can transfer all or part of your inheritance to the College under a Deed of Variation. Gifts transferred in this way are free of Inheritance Tax, meaning that St Anne's College could benefit during your lifetime, but do discuss this with your solicitor.

How do I transfer shares, land and property?

When quoted shares and securities are transferred to the College, UK income tax relief can be claimed by the donor for the full market value of the gift at the time of transfer, in addition to relief on any existing capital gains tax payable. This enables those holding shares with large capital gains to make a major donation to the College in a cost-effective way. Again, do discuss this with your solicitor.

What if I don't want to tell you about my gift?

That's fine – we'd love the chance to thank you for it, but realise that you may be uncomfortable talking to us about it, or have other reasons for keeping it to yourself.

Who do I contact to find out more?

If you would like further information or a confidential conversation, please contact **Edwin Drummond**, Director of Development, by phone on **+44 (0)1865 284536** or edwin.drummond@st-annes.ox.ac.uk. You can also write to development@st-annes.ox.ac.uk





PLEDGE FORM

I want to help the St Anne's of the future understand the world and change it for the better

Thank you for considering a legacy gift to St Anne's. Returning this legacy form doesn't commit you in any way. It simply lets us know your intentions and provides us with the opportunity to show our gratitude for your support during your lifetime.

Name

Address

Matriculation year

Email

Phone number

Please tick as applicable:

I have already included a gift to St Anne's in my will

I am considering adding a gift to St Anne's in my will

The following information helps us plan for the future and ensure that your wishes can be fulfilled.

I am planning to leave St Anne's:

the residue of my estate (or a portion thereof)

a specific sum of money

a specific asset (please specify)

An estimate of the current value of my proposed legacy is:

I wish my legacy to support:

Whatever is of priority to the College at the time of my death

A specific project – please indicate below:

We usually automatically make you a member of our Plumer Society – please tick if you'd prefer us not to do this:

Please tick if you're happy for your name to be listed in *The Ship* under our list of legators:

Please tick if you wish your legacy to remain entirely anonymous:

Please return your form to: **Development Office, St Anne's College, Woodstock Road, Oxford, OX2 6HS**





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Registered charity number: 1142660

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