

Suggested will wording

Sharing your wishes

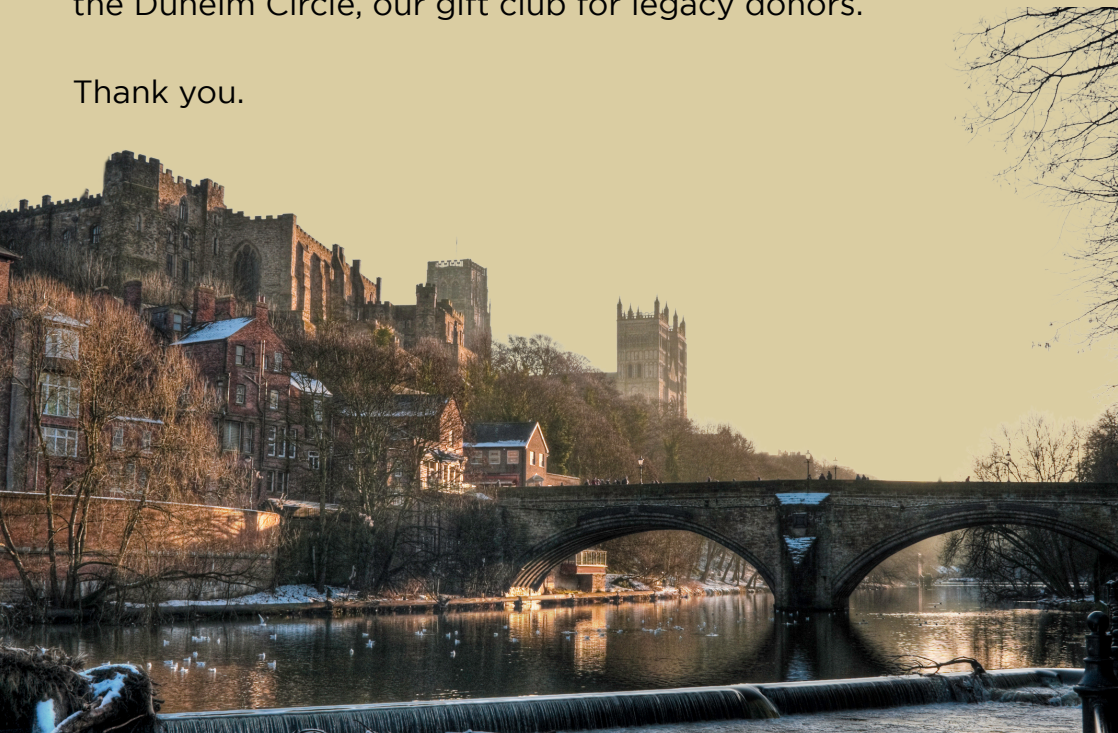


Thank you for expressing an interest in putting a gift in your will. Many of our alumni and supporters are contributing to our University in this way and we see the impact every year:

- new scholarships help to relieve financial pressure for students,
- improved facilities allow us to deliver an outstanding student experience,
- increased research capability enables our academic staff to achieve the extraordinary.

With appropriate professional advice, revising a will need not be complicated. In this booklet, we offer practical information for you and your lawyer or will writer. We are here to answer any questions about the University or discuss how a gift could be directed. After writing your will, please complete the pledge form at the back of this booklet and return it by post, or share your wishes with us via email. As a mark of our gratitude, you will be enrolled as a member of the Dunelm Circle, our gift club for legacy donors.

Thank you.



Suggested wording for your will

How to refer to the University as a beneficiary

The accountable body and legal entity for the purpose of the academic departments, faculties and the Business School, University sports, the library and any collections, and the colleges, with the exception of St John's College and St Chad's College, is Durham University. Where your wish is to refer to one of the colleges in your will, we suggest for the purpose of clarity that it is set out as follows: "[Name] College of Durham University, Palatine Centre, Stockton Road, Durham DH1 3LE".

If your gift is to St Chad's College or St John's College, they should not be set out in conjunction with Durham University, but in their own right and with their respective charity number and legal address. If your wish is a gift to University College Durham Trust, this is also a separate legal entity from the University; however, we work closely with the Trust, and so we would be pleased to make a record of your planned gift. If you state in your will that the gift is to a particular area of the University, your legacy will be directed as per your instructions.

Durham University is a UK Exempt Charity, meaning that it has charitable status and, as a higher education institution, it is regulated by the Office for Students. If you would like to use a unique identifier in your will to refer to the University, our tax exempt charity registration number is X6507.

Suggested wording for a gift of a specific sum (known as a pecuniary gift):

‘I give to Durham University (or named unit of Durham University) Palatine Centre, Stockton Road, Durham DH1 3LE, exempt charity tax registration number X6507, the sum of £..... or such larger sum as my trustees calculate to have the same present value at my death for its general purposes.’

Optional: ‘I express the wish, but without creating any legally-binding obligation, that Durham University use the said bequest for

I declare that the receipt of the University Chief Financial Officer or other authorised officer of Durham University shall be good and sufficient discharge to my Executors.’

Suggested wording for a specific bequest e.g. painting, specific investments, a property:

‘I give to Durham University (or named unit of Durham University) Palatine Centre, Stockton Road, Durham DH1 3LE, exempt charity tax registration number X6507, [description of item(s)] absolutely for its general purposes.’

Optional: ‘I express the wish, but without creating any legally binding obligation, that Durham University use the said bequest for[description of intended use/direction].

I declare that the receipt of the University Chief Financial Officer or other authorised officer of Durham University shall be good and sufficient discharge to my Executors.’

Suggested wording for a residuary bequest (the part of an estate that remains after specific legacies have been calculated):

‘I give to Durham University, (or named unit of Durham University) Palatine Centre, Stockton Road, Durham DH1 3LE, exempt charity tax registration number X6507, per cent of my residuary estate for its general purposes.’

Optional: ‘I express the wish, but without creating any legally binding obligation, that Durham University use the said bequest for[description of intended use/ direction].’

I declare that the receipt of the University Chief Financial Officer or other authorised officer of Durham University shall be good and sufficient discharge to my Executors.’



Pledge form

Understanding your wishes

It is helpful for the University to be aware of the gift in your will, so that we understand your wishes and can thank you during your lifetime. Please complete the form opposite and post it back to us. Alternatively, if you prefer you can share your wishes with us via email to legacies.team@durham.ac.uk.

Recording your wishes

The University acknowledges and understands that the information you provide in this form is not legally binding, and that you can at any point alter your gift. Please be assured that the information you provide will be kept confidential and retained by the University in accordance with its privacy policy. The University's Privacy Notice is available to view at durham.ac.uk/privacy.



Details of your gift

Name: _____

Address: _____

Phone number: _____

Email: _____

I have put a gift to Durham University in my will. The gift will be:

☐ unrestricted, to support the University's priorities at the time the gift is made.

☐ for specific purposes or a bequest of property, pension, insurance, company benefit or shares. Please give details.

☐ I am pleased to confirm my legacy gift at the following value approximately (or percentage of my residual estate with approximate current value):

Thank you

Please return to: Freepost Plus RTJX-TZSL-GUAJ, Louise McLaren, Development and Alumni Relations, Durham University, Science Site, South Road, Durham, DH1 3LE.



Contact

Louise McLaren, Legacies Manager
Development and Alumni Relations
Durham University
Palatine Centre, Stockton Road
Durham DH1 3LE
T: +44 (0)191 334 6313
E: legacies.team@durham.ac.uk

durham.ac.uk/legacies

On our webpages, you can access further information about how to put a gift in your will and read some of our inspiring examples. These stories showcase the varied benefits that gifts in wills bring to our University community and our impactful work.

