

# Remembering the University of Aberdeen

**LEAVING A GIFT IN YOUR WILL**



Looking Forward  
Giving Back



# Let's build on our great history and outstanding achievements

WE ARE PROUD TO HAVE BEEN ONE OF THE WORLD'S FINEST INSTITUTIONS OF HIGHER LEARNING AND RESEARCH FOR OVER FIVE CENTURIES. OUR VISION FOR THE FUTURE IS TO DRIVE FORWARD POSITIVE GLOBAL CHANGE. TODAY WE BUILD ON OUR REMARKABLE HISTORY OF WORLD CHANGING DISCOVERIES AND OUTSTANDING TEACHING. WITH YOUR HELP WE CAN WORK TOWARDS THE BEST POSSIBLE FUTURE FOR ALL OUR COMMUNITIES.

**By leaving a gift in your Will to the University you could help us to:**

- > Support talented individuals in financial need into a quality higher education
- > Combat a range of life-threatening diseases and illnesses
- > Address many global economic and societal needs such as energy and food security
- > Develop a campus where local communities can benefit from enriching cultural experiences

If you ever feel the time is right for you to remember the University in your Will, then you can make a difference and help us achieve our vision for the future.



# You can make a difference in the future to something that matters to you today

LEAVING A GIFT YOUR WILL IS AN AFFORDABLE WAY OF GIVING WHICH HELPS YOU MAKE A MAJOR DIFFERENCE TO SOMETHING YOU CARE ABOUT.

## Margaret's story

One of four children, Margaret Percival was born in Ilford. Sadly, Margaret lost one of her brothers following his battle with kidney disease. Passionate about making a difference to medical research in this area, she generously made a gift in her Will to support vasculitis and renal research at the University's Institute of Medical Sciences.

Professor Lars Erwig leads a team of scientists carrying out innovative research into multisystem diseases, including vasculitis. His research has been significantly enhanced thanks to the generosity of a number of supporters. Professor Erwig explained,

*“When diagnosed late or left untreated kidney disease can have devastating consequences. Thanks to our supporters we are currently developing a new way to measure the disease's progression in this indiscriminate, relapsing and remitting condition. Our hope is that this will lead to earlier diagnosis and improve the patient's quality of life.”*



## Hunter's story

Hunter Caldwell graduated in Classics from the University of Aberdeen in 1945. With a passion for education and fond memories of his alma mater, he left a gift in his Will to support the Sir Duncan Rice Library.

Archaeology and History student Elin Bark is extremely grateful to Hunter and the many other supporters that made the Library possible. Elin explained,

*“The Sir Duncan Rice Library is such a great resource and has absolutely everything you need as a student. It's a great library with a huge collection of physical items which are enhanced even further with the detailed online catalogue. This, together with plenty of other resources and helpful, knowledgeable staff, makes this beautiful building the best place to study.”*

## Mary's story

Originally from South Uist, Dr Mary Duncan moved to Aberdeen and graduated from the University in 1953 with a degree in Medicine. During her lifetime Mary established the Jim Duncan Scholarship, named after her father, to support students in financial need. By remembering the University in her Will, Mary ensured the Jim Duncan Scholarship would live on and continue to support students in the future.

Danny Serb from Romania receives a scholarship to study Politics and International Relations at the University. Danny explained,

*“Receiving a scholarship means more than you can imagine. Without my scholarship I would simply not have been able to afford to study here. It was always my mother's dream to go to university, however, this was not an option for her due to times of poverty and suppression in Romania. My scholarship has made the dreams of two generations come true. Thank you.”*

# Every gift in every Will makes a difference

WE ARE EXTREMELY GRATEFUL FOR EVERY GIFT WE RECEIVE. WHETHER YOU DECIDE TO LEAVE A CASH GIFT, SPECIFIC ITEM OR PERCENTAGE OF YOUR ESTATE AFTER YOUR LOVED ONES HAVE BEEN TAKEN CARE OF, WE WOULD LIKE TO SAY THANK YOU.

Leaving a gift to the University in your Will could not be easier and can be an effective way to reduce inheritance tax. You now have the opportunity to support us and help build on future outstanding work being undertaken at the University of Aberdeen.

If you are considering remembering the University in your Will then we have enclosed some useful factsheets for you and your solicitor. We would also be delighted to discuss your options with you.

For more information, please contact Liz Bowie, Director of Development on +44 (0) 1224 274198 or at [e.bowie@abdn.ac.uk](mailto:e.bowie@abdn.ac.uk).



# Our eight simple promises to you

- > We understand that your family and loved ones come first.
- > We are committed to our vision for the future and want you to know about the different ways you can support us including the opportunity to leave a gift in your Will. However, we will never ask you to do this and respect that it's a decision you will want to make in your own time.
- > You can tell us if you have left a gift in your Will if you want to but you don't have to. We would be delighted to hear and would love the opportunity to say thank you but will respect your privacy and won't ask you to share this information.
- > If you do notify us of your intentions, we will give you the choice about the level of communication you would like to have with us in the future. We would like to keep you updated on recent developments and the difference gifts similar to yours are making but that is up to you.
- > We will give you and your family as much choice as we can about how and where your gift will be used and the difference you would like it to make.
- > We will use your gift carefully and cost-effectively so that it has the greatest impact for the purposes you intended.
- > We recognise and respect your right to change your mind about leaving a gift in your Will to the University
- > We will handle your gift sensitively, respectfully and with care.

# What kind of gift can I leave in my Will?

THERE ARE VARIOUS WAYS YOU MAY WANT TO CONSIDER SUPPORTING THE UNIVERSITY WITH A GIFT IN YOUR WILL THESE INCLUDE:

## **A gift that provides for your loved ones first**

This gift is known as a reversionary legacy and will provide for your loved ones first and then benefit the University. The gift will only come to the University after your loved ones have been taken care of and have subsequently passed away.

## **A share of your estate**

Known as a residuary legacy this is a percentage of what remains after all other gifts and expenses have been made. This is a good way to make sure your gift won't be affected by inflation. The value of the gift will change in line with the value of your estate so you are less likely to have to change your Will in the future.

## **A cash gift**

Known as a pecuniary legacy this is a gift of a fixed sum of money. Inflation can reduce the value over time, however, you can arrange for the fixed amount to increase in line with inflation.

## **A specific item**

If you have valuable possessions such as a property, antiques or stocks and shares then you can leave these to the University as a gift in kind.

**If you are considering remembering the University in your Will then we strongly recommend that you seek professional advice from a solicitor when arranging or amending your Will. While we cannot offer legal advice, please do get in touch if you would like to discuss ways to remember us in your Will.**

# Suggested wording for your Will

**THANK YOU FOR CONSIDERING SUPPORTING THE UNIVERSITY OF ABERDEEN DEVELOPMENT TRUST WITH A GIFT IN YOUR WILL. EVERY GIFT IN EVERY WILL MAKES A SIGNIFICANT DIFFERENCE. WE ARE INCREDIBLY GRATEFUL FOR EVERY GIFT WE RECEIVE.**

The University of Aberdeen Development Trust is a registered charity in Scotland established to raise funds for the benefit of the University of Aberdeen. As a registered charity, your gift will be tax exempt and could mean any tax paid on your estate is reduced. We do, however, recommend that you seek professional advice from a solicitor when arranging or amending your Will.

If you have chosen to support the University with a gift in your Will, you may find the following suggested wording useful for:

## **Leaving a share of your estate or residuary legacy**

“I give to the University of Aberdeen Development Trust all (or a percentage or share) of my residuary estate to be applied to the area of greatest need (or your chosen area to support) of the said University and I declare that the receipt of the Registrar or other duly authorised officer shall be a full and sufficient discharge to my Executors. If the University of Aberdeen Development Trust (SC002938) ceases to exist, my gift should go directly to the University of Aberdeen (SC013683).”

## **A cash gift or pecuniary legacy**

“I give free of tax the sum of (insert amount in figures and words) \_\_\_\_\_ to the University of Aberdeen Development Trust (SC002938) to be used for the area of greatest need (or your chosen area to support) and I declare that the receipt of the Registrar or other duly authorised officer shall be a full and sufficient discharge to my Executors. If the University of Aberdeen Development Trust ceases to exist, my gift should go directly to the University of Aberdeen (SC013683).”

## **A specific item**

“I give free of tax (insert item or items) \_\_\_\_\_ to the University of Aberdeen Development Trust (SC002938) to be used for the area of greatest need (or your chosen area to support) and I declare that the receipt of the Registrar or other duly authorised officer shall be a full and sufficient discharge to my Executors. If the University of Aberdeen Development Trust ceases to exist, my gift should go directly to the University of Aberdeen (SC013683).”

## **A gift that provides for your loved ones first**

Please speak to your solicitor or legal advisor for wording to support a gift providing for your loved ones first.

# Adding to your existing Will

IF YOU HAVE ALREADY MADE A WILL AND WOULD LIKE TO UPDATE OR AMEND IT TO INCLUDE THE UNIVERSITY OF ABERDEEN DEVELOPMENT TRUST, PLEASE FILL IN THIS CODICIL FORM AND TAKE IT TO YOUR SOLICITOR.

I (full name) \_\_\_\_\_

Of (full address) \_\_\_\_\_

Postcode \_\_\_\_\_

declare this to be the (first, second etc) \_\_\_\_\_ codicil to my Will dated  
(insert the date of your Will in words) \_\_\_\_\_

In addition to the legacies given by me in my said Will, I bequeath free of tax (the sum of / percentage share of my residuary estate / specific item, in words and figures) \_\_\_\_\_  
absolutely to the University of Aberdeen Development Trust (SC002398) to support (the area of greatest need or chosen area)  
\_\_\_\_\_

I declare that the receipt of the Registrar or other duly authorised officers shall be a full and sufficient discharge to my Executors. In all other respects I confirm my Will and any other codicils to it.

In witness whereof I have hereunto set my hand this (date in words) \_\_\_\_\_

Signed \_\_\_\_\_

by the said (your full name) \_\_\_\_\_

## Witnessed by:

One witness is needed in Scotland; two witnesses are needed in England, Wales and Northern Ireland. Please make sure your witnesses are not beneficiaries under your Will or codicil, their wives, husbands or Executors of your Will.

### FIRST WITNESS

Signed \_\_\_\_\_

Name \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_

Postcode \_\_\_\_\_

Occupation \_\_\_\_\_

### SECOND WITNESS

Signed \_\_\_\_\_

Name \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_

Postcode \_\_\_\_\_

Occupation \_\_\_\_\_

# Sharing your intentions

**IF YOU HAVE CHOSEN TO SUPPORT US WITH A GIFT IN YOUR WILL THEN WE WOULD BE DELIGHTED TO KNOW SO WE CAN SAY THANK YOU.**

**BY SHARING YOUR WISHES AND INTENTIONS YOU WILL RECEIVE THE OPPORTUNITY TO JOIN THE THOMAS REID CIRCLE. AS A MEMBER WE WILL KEEP YOU UPDATED ON RECENT DEVELOPMENTS AT THE UNIVERSITY AND THE DIFFERENCE GIFTS SIMILAR TO YOURS ARE MAKING.**

Yes, I have chosen to support the University of Aberdeen Development Trust with a gift in my Will.

Full name \_\_\_\_\_

Are you a graduate of the University of Aberdeen?      Yes \_\_\_\_\_      No \_\_\_\_\_

Degree and subject of study \_\_\_\_\_

Address \_\_\_\_\_

Postcode \_\_\_\_\_ Telephone number \_\_\_\_\_

Email address \_\_\_\_\_

My gift is:

A share of my estate

A cash gift

A gift that provides for my loved ones first

A specific item

Other (please specify) \_\_\_\_\_

If you are able to and would like to share the value of your gift, please indicate the approximate value of your gift: \_\_\_\_\_

I would / would not like my gift to be acknowledged in the University's reciprocation book. I would like my acknowledgement to appear as: \_\_\_\_\_

I would / would not like to join the Thomas Reid Circle

**Thank you for choosing to support the University of Aberdeen Development Trust. Every gift in every Will makes a significant difference and we extremely grateful for your support.**

**Please return this form to University of Aberdeen Development Trust, FREEPOST AB567, Aberdeen AB24 3FX.**

University of Aberdeen  
Development Trust

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[www.abdn.ac.uk/giving](http://www.abdn.ac.uk/giving)

The University of Aberdeen Development Trust  
is a charity registered in Scotland, no: SC002938

Looking Forward  
Giving Back

