

# THE RHODES TRUST MCCALL MACBAIN FOUNDATION LEGACY MATCH



## A UNIQUE OPPORTUNITY

There has never been a better time to support the Rhodes Scholarships by including a gift in your will or with another type of planned gift. With two steps you can generate an immediate cash donation to Rhodes Trust from the McCall MacBain Foundation.

## TWO STEPS TO GENERATE AN IMMEDIATE MATCH PAYMENT

1. Name the Rhodes Trust in your will or set up a planned gift with the Rhodes Trust as a beneficiary.
2. Tell the Rhodes Trust about your future gift by completing the Legacy Match form.

## HOW MUCH IS YOUR COMMITMENT WORTH?

The Rhodes Trust will receive a gift of 10% of the estimated value of your intended bequest/planned gift if you are able to estimate the value, or a gift of £5000 if you are not able to estimate the value of your bequest/planned gift.

## DETAILS

1. The Legacy Match covers many types of planned giving as well as bequests in your will. Eligible gifts include life insurance policies, real estate, personal property, or placing assets in trust with the Rhodes Trust named as a beneficiary.
2. Your bequest commitment is non-binding and your estate plans can be revised in the future.
3. The Legacy Match will end when either 100 bequest/planned gift intentions have been matched or £1M has been paid in match payments.
4. You do not have to choose the amount of your bequest now. A popular choice is to state a gift as a percentage of your estate, which will automatically adjust no matter what the future may bring.
5. Only bequest/planned gift notifications received from Rhodes Scholars, or their spouses or partners, are eligible for matching.
6. The maximum match payment for any single commitment under the Legacy Match will be £25,000. In other words, the first £250,000 of the current estimated value of your bequest/planned gift will be matched at 10%.
7. You will be recognised in the donor report as a member of the Rhodes Society, unless you wish to be anonymous.
8. All match funds received under the Legacy Match, along with your future legacy gift, will be designated to the Rhodes Society fund, a permanent named fund within the Rhodes endowment to fund the core scholarships in honour of our legacy donors. As a member of the Rhodes Society you will receive an annual report on the value of the fund.

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