

## MAKING A BEQUEST IN THE USA

### SECURING THE FUTURE OF THE RHODES SCHOLARSHIPS

The Rhodes Scholarships themselves show how far-reaching the effects of a bequest can be.

An easy and low cost way to make a planned gift to support the Rhodes Scholarships is to include us in your will or revocable trust. It is especially fitting for those who benefitted from one of the world's most remarkable bequests to include support for the Scholarships in their own bequests.

You can give almost any kind of asset through a bequest, including cash, securities, an interest in real estate (such as a residence), or the remainder of your IRA, Keogh, tax-sheltered annuity, qualified pension or profit-sharing plan. We strongly recommend that you ask your attorney about your bequest options, such as specific bequests, residuary bequests, testamentary trusts and QTip trusts.

A bequest to the Rhodes Trust may reduce the amount of tax payable from your estate. This varies from country to country, so please seek advice from your legal or financial advisor. However, a charitable bequest is deductible for federal estate tax purposes, and there is no limit on the amount of the estate tax charitable deduction your estate can take. In addition, bequests generally are not subject to state inheritance or estate taxes. In a large estate, the savings can be more than half the value of the bequest.

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#### SUGGESTED WORDING:

For an outright bequest: I give and bequeath to Americans for Oxford for the benefit of the Rhodes Trust the sum of \_\_\_\_\_ exclusively for the advancement and support of the Rhodes Scholarships.

For a residual bequest: All (or %) of the rest, residue, and remainder of my estate which I own or am entitled to at the time of my death, I give, devise and bequeath to Americans for Oxford for the benefit of the Rhodes Trust exclusively for the support and advancement of the Rhodes Scholarships.

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#### PLANNED GIVING:

US taxpayers can take advantage of the highly effective and tax efficient options currently available to US taxpayers to support the Rhodes Scholarships through a planned gift (including a bequest).

Further information about your options can be found at the University of Oxford North American office's dedicated Planned Giving website: [www.oxford.playourlegacy.org](http://www.oxford.playourlegacy.org)

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For further information about how you can support the Rhodes Scholarships with a legacy bequest, please contact either:

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