



# Your Will Your Legacy

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## BUILDING THE FUTURE TOGETHER

There are many reasons to consider including a bequest to the Rhodes Scholarships in your Will:

- You may want to honour your Scholarship and Oxford experience which was life-altering and helped shape your life's journey.
- Your bequest creates a powerful link between your life experience and those Rhodes Scholars who will come after you. Your investment in future Rhodes Scholars continues your legacy that will inspire and live on.
- A gift in your Will also allows you to plan for the future without compromising your personal or financial circumstances today. Wills are revocable and can be changed if your circumstances change. A gift planned through your Will can have a much greater financial impact than you might imagine.

We invite you to join a growing community of Scholars and Friends of the Trust who have included the Scholarships in their Will. Together these bequests of all sizes grow exponentially to support a global fellowship of Scholars who will make our world a more just and better place, not only for the 21st century but for the 22nd century too.

“ The Rhodes Scholarship completely transformed my personal development and prospects in life. I feel a deep need to acknowledge this and give back to the Rhodes Trust so that future generations can benefit as I did. ”

**Jacko Maree**  
**(St Andrew's College, Grahamstown & Pembroke 1978)**

## THE VOICE OF SCHOLARS

Rhodes Scholars are a global community that have always shared a common spirit and a passion to make a difference in the world. Ours is an enduring community that spans and connects across generations.



### My vision, my legacy...

“ Recognizing the importance of legacy gifts – after all it was a bequest that started the Rhodes Scholarships and provided me with my unique experience – I wanted to contribute to their future sustainability. A legacy gift can be established in a variety of ways to provide flexibility and tax benefits in many countries. But most of all, it is a way for me to ‘pay it forward’ to future generations of Rhodes Scholars. ”

**Don Gogel**

(New York & Balliol 1971) Trustee and Rhodes Society member

## ACROSS GENERATIONS



### My vision, my hope...

“ I will get a great education so I can pay forward whatever opportunities I have received at Oxford and hope for a ripple effect which I can generate within my own community so more students who come from similar backgrounds to me can be in a place like mine. ”

**Summia Tora**

(Afghanistan & Summerville 2020)

AN INVITATION TO INVEST IN

THE NEXT CENTURY OF SCHOLARS



It's impossible to predict what path future Scholars will follow. But now, more than ever, we know our world needs bright young minds with their energy and commitment to working in the service of humanity.

We invite you to join us as we build on the exciting achievements of the past century and support this most international of scholarships – one that connects world-focused Scholars together to astounding effect.

For over 120 years, Rhodes Scholars have worked together to fight the world's fight. Today's Scholars continue to lead by guiding nations, curing diseases, advancing technology, and elevating the positive potential of the world.

## HOW TO MAKE A BEQUEST

There are many ways to include the Scholarships in your Will. The most popular and easiest is a simple bequest. This can be done by:

- Stating a specific monetary or cash gift amount in your Will.
- Designating a percentage of your estate.
- Specifying a residual gift for all or part of your estate after your loved ones and debts have been accounted for.

Depending on your country's tax code, you may be able to include gifts of securities, retirement funds, life insurance, annuities among other options.

There may also be a separately incorporated Rhodes Trust charity in your country of residence that will allow your estate to receive tax benefits. **It's critically important that you use the correct legal name in your Will.**

Please refer to the attached materials for the correct legal name in your country of residence. You will also find an insert titled '*Leaving a Bequest in Your Will*'. This provides further information and examples of wording.

**This information is of a very general nature and we always recommend you consult your legal/financial advisors before drafting or updating your Will.**

## WHERE CAN MY BEQUEST MAKE AN IMPACT?

Your investment in 21st century Rhodes will be a catalyst for Scholars in Oxford and alumni globally to come together to use their combined, unique strengths and commitment to make a difference in their communities and in the world at large.

- Your gift can support communities around the world in finding and selecting exceptional young minds to become Scholars.
- Your gift can support Lifelong Fellowship programmes that connect Scholars and nations to work together to find solutions to future challenges that only globally-minded leaders make possible.
- Your gift can support a Scholar's academic programme through research and entrepreneurial grants, hardship grants or mentorship programmes.

If you would like to designate your bequest to a particular country, programme, the endowment or to set up a named fund, please contact us so that we can ensure we are able to honour your wishes.

Depending on your age, we may also be able to count your bequest in the Trust's capital campaign aimed to strengthen the Rhodes community of impact and foster the world's exponential potential.



“As a recent graduate, I chose to participate in the bequest program as I felt it is a fitting way to enable others to have the same opportunity that I was given. The Scholarship had such a transformational impact on my life, and a bequest is one way I can acknowledge this and make a meaningful contribution.”

**Peter Gill**  
(Alberta & Magdalen 2009)

## OUR PROMISE TO YOU

We appreciate the many decisions you may consider when making your Will. Should you generously include the Scholarships, we commit to using your gift efficiently and for its intended purpose. We will respect your privacy, acknowledge your generosity and respond promptly to your questions.

## OUR THANKS AND AN INVITATION

Should you include the Rhodes Trust in your Will and wish to tell us about it, we would value the opportunity to say thank you and have you join us as a member of our Rhodes Society.

This is a growing group of Scholars and non-Scholars who have included the Trust in their estate plans. You will receive a special pin honouring your bequest, be recognised in Trust publications and be invited to special events held in Oxford, in your region, or virtually. Activities showcasing the academic life of current Scholars are always a highlight.



## NEXT STEPS

Included in this package is a form titled 'Letting us know of your bequest intentions'. If the time is right, please complete the details and return it to:

Development Office  
Rhodes House  
South Parks Road  
Oxford OX1 3RG  
United Kingdom

Or, you can find an online version of this form on our website:

**[rhodeshouse.ox.ac.uk/donations-bequests/bequests-and-planned-giving/](https://rhodeshouse.ox.ac.uk/donations-bequests/bequests-and-planned-giving/)** which can be emailed to **[development@rhodeshouse.ox.ac.uk](mailto:development@rhodeshouse.ox.ac.uk)**

## I STILL HAVE QUESTIONS. WHO SHOULD I CONTACT?

We're here to help. Should you have any questions or would like your bequest to be spent in a specific way, we're always happy to have a confidential conversation to ensure we can honour your wishes. Please contact our Planned Giving Team at: **[development@rhodeshouse.ox.ac.uk](mailto:development@rhodeshouse.ox.ac.uk)**