



Leaving a Bequest in your Will

THE RHODES TRUST IN SOUTH AFRICA

Master's Reference No. IT 3999/2009 Public Benefit Organisation (PBO) No. 930032362

There are many ways you can leave a gift in your Will

A fixed amount allows you to specify or set an amount of money to be designated to the Scholarships. This can be a good option if you feel confident your estate can meet all your other priorities and commitments.

A residual gift allows you to remember your principal commitments first (such as your family and loved ones). All of the remainder can then be designated to the Scholarships. This has the advantage of automatically keeping up with inflation.

A percentage of your estate allows you to divide your estate into specific percentage amounts, with a specific percentage as a charitable gift to the Scholarships.

Adding a Codicil: If you have already written your Will and now wish to include the Scholarships, you may do so by simply adding a codicil to your existing Will, witnessed generally by two individuals and again designating either a fixed amount, percentage or residual.

Name of the legal entity:
**The Rhodes Trust in
South Africa**

Charitable Registration
Number:
**Master's Reference
No. IT 3999/2009
Public Benefit
Organisation (PBO)
No. 930032362**

"Being a legacy donor
inspires me to work
harder, do more, and live
a life of impact. In doing
so, I hope that I may be
fortunate enough to one
day give back to the Trust
substantially in the way it
did so generously to me."

Kameel Premhid
(KwaZulu-Natal & Lady
Margaret Hall 2013)

Examples of wording for your Will

An unrestricted cash gift:

I bequeath the amount of (enter currency amount in figures and words) without interest to the (enter name specific to your geographic location – see box left) for its general purposes and I declare that the receipt of the treasurer or other proper officer of the organisation, or its successor, shall be sufficient discharge of my Trustees thereof.

For residual bequest:

I direct my Trustees to pay and transfer the whole (or percentage) residue of my estate to the (enter name specific to your geographic location – see box left) for its general charitable purposes and I declare that the receipt of the treasurer or other proper person of such organisation, or its successor, shall be sufficient discharge of my Trustees therefore.

A gift for specific purposes:

If you wish to designate your gift in a specific way (i.e. in support of a Scholarship in a specific geography), or if you wish to leave a gift of something valuable such as property or stocks and shares, please contact us in the Development office and we would be happy to discuss options with you (see contact information below).

A bequest to the Rhodes Scholarships may reduce the amount of tax payable from your estate. This varies from country to country. **We always recommend you contact your attorney and/or financial advisor for advice on tax consequences and appropriate wording to reflect your personal circumstances.**

For further information please contact: Email: development@rhodeshouse.ox.ac.uk