

**Legacy Gift Intentions**

We would love to know of your intentions if you choose to make a gift to Bath in your Will. By returning this form, you will help us to plan for the future and most importantly enable us to say **thank you.**

Once you let us know your wishes, we will welcome you to our Legacy Circle, the 1966 Society, and invite you to unique events, to recognise your generosity.

Any information you choose to provide will be confidential.

Name\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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

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Phone number\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Email\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date of birth\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

* I have already included the University of Bath in my Will
* I intend to leave a gift to the University of Bath in my Will.
* I would like help with wording my ‘letter of wishes’

We hope you will share more information about your legacy intentions so we can better understand your connection to the University and keep in touch about activities that may be of interest to you.

**I intend to remember the University of Bath in my will by making:**

* A cash gift of £\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* A gift of a percentage or share of the value of my estate of \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_%
* A specific gift (i.e. shares, property or other assets; please specify) \_\_\_\_\_\_\_\_\_\_\_\_

 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

* A reversionary gift to the University - I have passed my estate (or asset) to a first beneficiary to have the benefit and enjoyment during their lifetime and specified that the estate (or asset) should subsequently be passed to the University.

**I would prefer my gift to be used:**

* Wherever the need is greatest. These gifts are helpful to the University of Bath since they offer flexibility should areas of need change in the future.
* The area I would most like to support is:
	+ - Scholarships
		- Research
		- Student Support
		- Other *(please specify)* \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
		- A Centre/Faculty/School/department *(please specify)*

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Becoming a member of the 1966 Society:**

Taking its name from the year the University received its Royal Charter, the society was founded to recognise and thank those who have pledged a special gift to remember the University of Bath in their Will during their lifetime.

* I am happy for my legacy to be recognised in the University’s communications and I would like to enrol as a member of the 1966 Society, with my name appearing as follows: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* I would like my legacy to remain anonymous
* I would like to be invited to University of Bath events

**I would like to share details of my next of kin with you so you can thank them:**

Name\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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

**Thank you for your gift to the University of Bath and being a huge part of our future.**

We will acknowledge safe receipt of this form and will get in touch to discuss your wishes if you have indicated that you may like help with wording. If you have any questions in the meantime, please call Gemma Bhakta, Legacy and in Memory Manager on 01225 385842, or via email at gb2074@bath.ac.uk. Please return this form to us at:

Legacy and in Memory Manager Advancement Office, University of Bath,2 South 0.16, Claverton Down, Bath BA2 7AY, UK.