



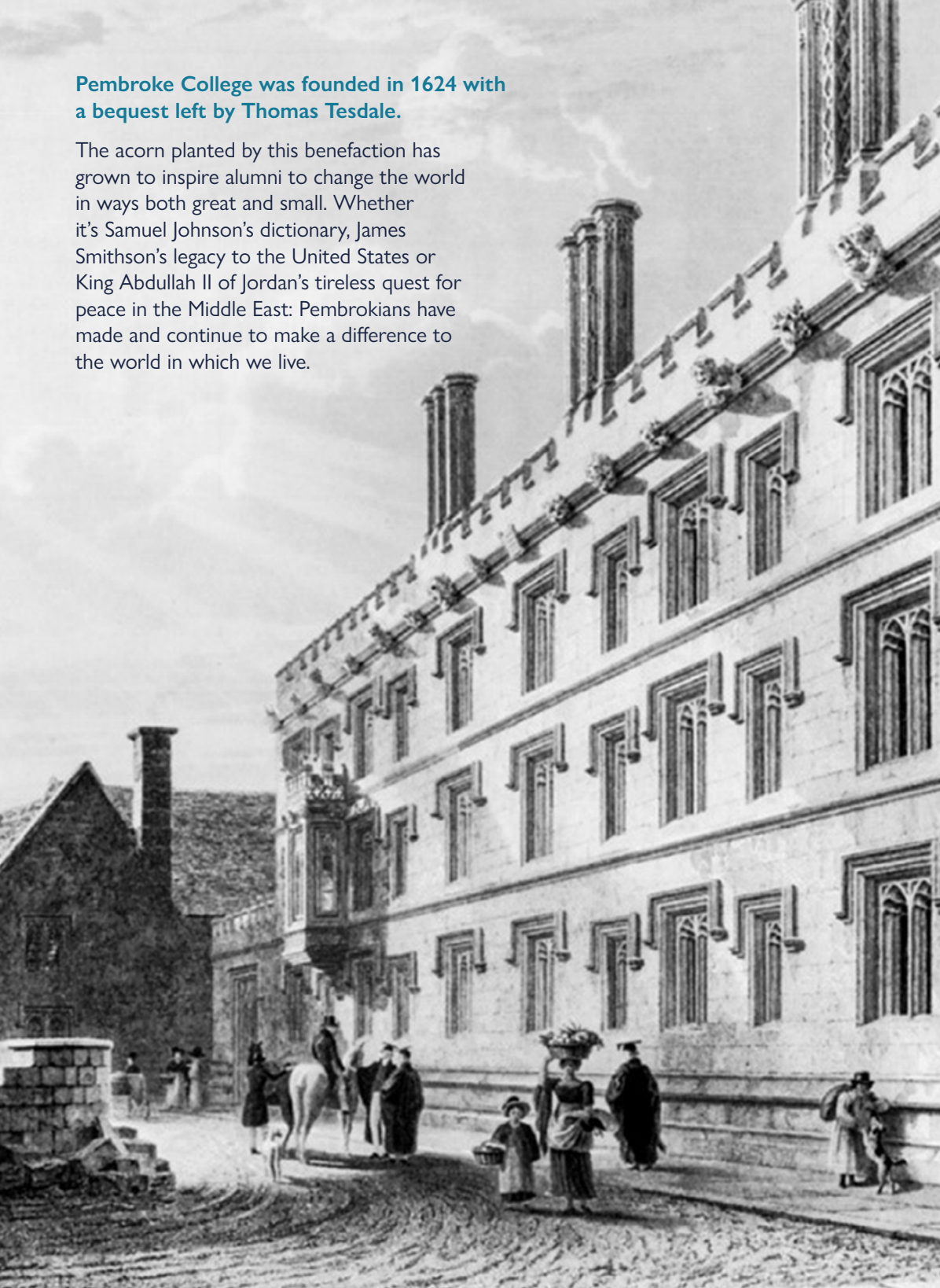
# Imagine



## What could your legacy be?

**Pembroke College was founded in 1624 with a bequest left by Thomas Tesdale.**

The acorn planted by this benefaction has grown to inspire alumni to change the world in ways both great and small. Whether it's Samuel Johnson's dictionary, James Smithson's legacy to the United States or King Abdullah II of Jordan's tireless quest for peace in the Middle East: Pembrokians have made and continue to make a difference to the world in which we live.





## Pembroke currently stands at a hinge point in its history.

Over the past 25 years, through the generosity of alumni, good governance and sound financial management, the College's endowment has grown from £7m to £60m. While this is fantastic progress, it is far short of the amount that would be required to fully endow the quality of teaching, research and personal growth that we all want generations of future Pembrokiens to enjoy.

We are now calling on those who have themselves benefited from Pembroke and understand what a transformative experience it can be, to consider leaving a bequest or making a planned gift. Your legacy will ensure that we foster a collegiate, creative, and academic environment which is open to all, while also preserving what makes Pembroke special. You will also help ensure that Pembroke's estate is fit for our fifth century and beyond, providing the very best facilities to our students, fellows, staff, and wider community.

While we can celebrate our past, we cannot predict what the future will look like. By helping us lay this foundation for the future, your legacy will not only contribute to Pembroke's financial freedom to meet future challenges; it is also an extraordinary opportunity to help future Pembrokiens fulfil their hopes, dreams, and full potential.

# What legacies achieve



*Peter Farthing*  
*Jurisprudence, 1968*

Many of you will remember Peter Farthing – his name lives on among current students as the name of the café that sits as the hub of College life. Peter's bequest to Pembroke was unrestricted, meaning that Pembroke had the flexibility to use the legacy where the need was greatest.

Not only did Peter's legacy support the general endowment...

...it also endowed two fully-funded DPhil Scholarships in Law.



“ Growing up as the son of a single parent in Australia, I never thought that I'd be able to achieve my dream of pursuing a career in legal academia. Thanks to Peter Farthing's legacy, I've been able to pursue my interest in constitutional law and referendums at Pembroke.

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Steven Spadijer



“ For me it is simple. I never would have been able to take up my place here if it wasn't for the Scholarship that Peter Farthing provided for me. Coming to Pembroke has allowed me to not only continue my studies at an advanced level, but it has also given me crucial teaching experience. I will be forever grateful to Pembroke and Peter Farthing for this opportunity.

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Suzanne Zaccour

# Our legacy to Pembroke...



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Stephen Perkins  
Chemistry, 1969

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“ I have chosen to support Pembroke's future simply because, when I was 18, Pembroke showed me how I could go on to contribute to education in my career. Through my BA and DPhil studies at Pembroke, I was able to explore the Chemical and Biochemical Sciences to my heart's content. In time I became a Professor at University College London. By leaving a gift in my Will to the endowment, I hope that future generations of young people will be inspired by Pembroke's diverse community and intellectually stimulating environment.



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Graham Layer  
Medicine, 1971

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“ My wife and I have long been supportive of Pembroke, so providing a bequest was a natural next step. Our legacy will help to make sure that Pembroke remains true to its core values – a friendly, nurturing academic and social community for the very brightest all-rounders.



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Will Price (PPE, 1990) and  
Nicky Lumb (PPE, 1992)

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“ Pembroke has had a huge impact for both of us. The subjects we studied and the people we met have enriched our lives ever since. We have left a provision for the College in our Will and are both members of the Tesdale Society\*. We highly encourage others to consider doing so.



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*John Church*  
*Bursar from 2003-2018*

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“ In my 15 years at Pembroke, I was able to see the impact of legacies on a day-to-day basis. As Bursar, they allowed me to have a greater sense of financial freedom to respond to an ever-changing environment.

I was so impressed with what legacies were able to do for Pembroke, my wife Jo and I have decided to join the Tesdale Society\* and I have left a portion of my estate to Pembroke to support the General Endowment.



\*For more information on the Tesdale Society, please see the 'How we recognise your legacy' section

# What will your legacy to Pembroke be?

There are a variety of ways that you can make a legacy to Pembroke.

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## Residuary Legacy

Leave a portion of your estate after you have provided for those closest to you.

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## Pecuniary Legacy

A fixed sum of money.

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## A named item (specific legacy)

A specific gift (such as a piece of artwork, property or collectible item) that can be sold or will generate an income.

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## Reversionary legacy

This gift provides for your family, loved ones and then subsequently benefits the College. It involves leaving assets to trustees so that these named beneficiaries can enjoy the income in their lifetime and then the remainder reverts to Pembroke after their death.



# Sample Wordings

The following are suggested sample wordings – we highly recommend that when drafting and finalising your Will, you speak with your family and legal professionals with expertise in the area.

## Residuary Legacy

'I give to the Master and Fellows of Pembroke College, Oxford, (Charity No. 1137498) [percentage] of my estate and I direct that the receipt of the Bursar, or other authorised College Officer shall be a good and sufficient discharge to my executors or Trustees for the discharge of my said legacy.'

## Pecuniary Legacy

'I give to the Masters and Fellows of Pembroke College, Oxford (Charity No. 1137498) [sum of money] free of tax and I direct that the receipt of the Bursar, or other authorised College Officer shall be a good and sufficient discharge to my executors or Trustees for the discharge of my said legacy.'

## US Legacies

'I give [amount in dollars] or [percent] or [all of the residue of my estate] to the Trustees of the Pembroke College Foundation, Inc (tax number 521360375), a US-based 501(c)3 charity. It is my preference that this sum be given for the benefit of Pembroke College, Oxford, United Kingdom.

## Before leaving a legacy

We highly recommend you speak to members of your family and consult legal/financial professionals where appropriate.

You can also make a gift of income-generating property in your lifetime, or you can make a gift of shares, which has substantial tax advantages, in your lifetime.

There are tax advantages to making a bequest in favour of a charity; if you leave 10% of your estate to Pembroke (or any other registered charity), then your Inheritance Tax Threshold reduces from 40% to 36%. Because Pembroke is a charity, a legacy to the College is free of inheritance tax and a gift of appreciated property also has tax benefits.

For American donors, there can be additional, substantial tax benefits and a larger range of planned giving vehicles. Visit [www.oxford.planyourlegacy.org](http://www.oxford.planyourlegacy.org) for more information.

# How we recognise your legacy

In exchange for your generous gesture, we invite you to become a member of the Tesdale Society. Named for one of the College's founders, membership in this society entitles you and your partner to...



## **An annual Lunch**

which involves an insight into College life, our Fellows' research and a glimpse into the College's future.



## **Invitations to other special events**

such as carol concerts, the Silver Assay and bespoke Pembroke events in the UK and across the world.



## **A Tesdale Society lapel badge**

for you and your partner.

We understand that this is an intensely personal decision and we encourage all those thinking of leaving a bequest to Pembroke to speak with their loved ones. In all cases, we encourage you to consult legal and financial professionals throughout the process.

To help with long range planning, it is often very helpful for the College to know the approximate current value of your gift. You can use the form to the right for this purpose and/or to join the Tesdale Society. Such information will, of course, remain confidential.

**Please send completed forms to**

Development Office  
Pembroke College  
Oxford  
OX1 1DW

# Further information

If you would like to receive further information about leaving a bequest to Pembroke, then please contact us.

**T** | +44 (0) 1865 276 478

**E** | [development@pmb.ox.ac.uk](mailto:development@pmb.ox.ac.uk)

Or send the 'Request for more information' slip to Pembroke College, St Aldates, OX1 1DW

**Thank you in advance for your consideration.**



**PEMBROKE**  
COLLEGE OXFORD