



LMH
Lady Margaret Hall

LMH is for Life

The Gift of Education
make a lasting impact through your legacy



“Souvent me
souviens”

I always remember

Remembering LMH in your Will

Legacies have made LMH what it is today and will make it what it can be tomorrow. You are part of the College's history and you can be part of its future too.

LMH is known for its pioneering spirit and ability to turn challenge into change. From those first nine women to study at Oxford in 1879, to the intrepid cohort of men who arrived at the former women's college in 1979, and to the ten courageous students who tried out the Foundation Year in 2016, the College has changed the lives of those who come to study and live in the beautiful riverside setting at the end of Norham Gardens.

LMH continues to excel in the education it provides, and the research our community of academics undertakes. Today we are global, diverse and inclusive as we play our part in transforming the future.

It is largely due to the legacies from alumni and fellows that this has been possible. These gifts are central to our ability to provide the exceptional level of education and support for which the College is rightly recognised today.

As one of Oxford's historically less well-off colleges, LMH is accustomed to running a tight ship. With limited resources the College must consistently cut its cloth accordingly, restricting our ambition to support students as we and they would ideally like. Although relatively short-term in the context of LMH's history, the pandemic has shone an even brighter light upon the vulnerability of our income, with the cancellation at a stroke of over a year's worth of conferences and attendant income.

Including LMH in your Will is a truly life-affirming way to secure and cherish the future of the College and those we teach, for the long term.



Join us and make a difference



Generations of students come and go, shaping and taking their place in the College's history. As the College's custodians, the Fellowship is committed to protecting and ensuring its future. Financial resilience is integral to the present and future strength of LMH, as are our values, reputation and vision. Legacy gifts have enabled us to secure tutorial teaching and research posts, to construct new buildings, and to fund programmes, scholarships and bursaries that underpin our commitment to academic excellence, opportunity and equality.

It is my hope that the deep connection and pride which many alumni feel towards the College will help you support the next generation. Changing a life is in itself life-changing, and I encourage you to consider making a gift in your Will.

I am deeply grateful, as are our students, to everyone who has responded so generously to our legacy appeals in the past. I hope we can inspire you to join us and make a difference to the future of LMH.

Professor Christine Gerrard
Principal



Sarah Lee



“ I am proud to be part of a college which continues to value its founding principles of inclusivity and equality within a community that cares for one another. We are lucky to have a wealth of opportunities and I am so grateful to our donors for helping to make LMH the place it is today.”

Lewis Boyd (2020 History)
JCR President

“ Reaching our sixties is a common time for pausing to take stock; careers largely completed, families raised, particular objectives achieved.

Looking back with this longer perspective can bring into sharper focus the early springboards we were offered, the time invested in us by others, and the unique privilege of an excellent education.

At the same time as I recognise these benefits, and am deeply grateful for them, I am also very aware that I can never pay my tutors back for what they gave to me.

But I can pay it forward, through a legacy to College enabling the students of tomorrow to enjoy those same outstanding opportunities.”

Amanda Taylor (Smith, 1979 Modern Languages)



Securing the future: make a life-changing gift

Leaving a legacy to LMH will make a real difference to the opportunities and environment the College can offer future generations.

In addition to helping us to look after our most urgent needs, legacies will support us in meeting our fundamental priority – to fund our long-term future.

While there are different types of legacy you can leave to make an impact on the next generation, we encourage you to leave your legacy gift free from restriction so that we can meet our greatest needs. This will allow for flexibility and help to increase LMH's financial agility.

We are delighted to assist you in making your legacy pledge to LMH and are happy to answer any questions you may have as you plan your future gift.

Please contact us at any time if there are areas of specific support you wish to know more about. Your solicitor can advise you on the best way to record your intentions and, should you wish to make a change to an existing Will, they can also advise on using a codicil.

What kind of legacy can you leave to LMH?

Residuary legacy

A gift of all or a percentage of your estate after other legacies and liabilities have been paid. The advantage of a residuary legacy, unlike the pecuniary gift, is that it holds its real value, regardless of inflation. A particularly popular way to leave a gift to a charity.

Pecuniary legacy

A gift of a specific sum of money. To ensure your gift keeps its value in line with inflation, it can be linked to the index of retail prices.

Reversionary legacy

A gift of assets to the College whilst giving your spouse or wider family the benefit of them during their lifetime.

A Deed of Variation

If you are a beneficiary of a Will, you can transfer all or part of your inheritance to the College under a Deed of Variation. Gifts transferred in this way are free of Inheritance Tax, and allow LMH to benefit during your lifetime.

Wording

All legacies to LMH should refer to the College by its full, official title. Suggested wording for your Will is as follows:

"I leave to The Principal and Fellows of the College of The Lady Margaret In The University of Oxford (Charity Reg. No: 1142759) [the residue] / [% of the residue] of my estate [or] [the sum of £x] free of tax for the general purposes of the College and declare that the receipt of the Treasurer or other duly authorised officer shall be a good and sufficient discharge to my Executors or Trustees."

Including LMH in your Will is a straightforward and fulfilling gift to make and, depending upon where you live in the world, there are also a number of financial advantages.

Tax benefits

LMH is a registered charity (no. 1142759) and this means that there are financial benefits to leaving a legacy to us. In the UK, making a bequest to a charitable institution is free of Capital Gains Tax and Inheritance Tax (IHT). By remembering the College in your will, you can reduce the taxable value of your assets and so reduce the amount of IHT payable on your estate. Gifts may be in the form of money, property, or other valuables.

Did you know?

Currently, if you leave at least 10% of your estate to charity in the UK, your estate will be able to take advantage of a reduced rate in IHT, from its current level of 40% to 36%.

If you live in North America and would like to learn more about Planned Giving options in the United States, please contact Americans for Oxford Inc., the University's primary charitable organisation in the United States.

University of Oxford North American Office, 500 Fifth Avenue, 32nd Floor, New York, NY 10110. Tel: +1 212 377 4900. Email: central@oxfordna.org. Web: www.oxfordna.org

For further information or if you live elsewhere, please contact us.



How your legacy can shape LMH's future



As our lives and careers have progressed, we reflect on our time at LMH with increasing appreciation. In addition to many fond memories, the College provided us with an academic grounding that has underpinned everything we have achieved professionally since. In particular, we benefitted from the tuition of the late and brilliant Professor Sir Chris Dobson, in whose ground-breaking research group we first met. We are regular visitors to LMH and are delighted with the way the College has evolved through its development campaigns and the pioneering Foundation Year programme."



Jamila Fattah (1988) and Nick Burke (1987), Chemistry

The Beaufort Circle

We recognise the enormous contribution that legacy gifts make to the life and future of the College. Everyone who informs us that they have included a gift to LMH in their Will is invited to join the Beaufort Circle. Now one of the largest legacy societies in Oxford, its members include more than 270 alumni and friends of LMH who want to support the College into the future. It is our pleasure to invite members and their guests to a special annual event each year so that you can hear first-hand about LMH's progress and speak with the Principal and senior fellows about our plans.

We are delighted to include the names of all members of the Beaufort Circle (unless anonymity is requested) in our annual roll of donors. Please note that details of gifts to the College are treated in confidence and amounts are never disclosed.



"Souvent me souviens"

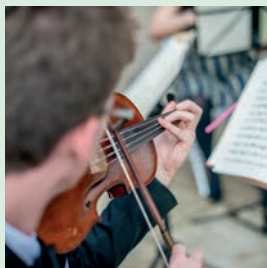
The Beaufort Circle is named after Lady Margaret Beaufort, mother of Henry VII and the patroness of learning, in whose honour the College was named. The Beaufort family motto "*Souvent me souviens*", incorporated for LMH's jubilee in 1928 and usually translated as 'I always remember', is a fitting connection between celebrating and remembering the College and also looking forward to the future.

Next Steps

We would like to be able to thank you for your generosity in including LMH in your Will. Please write to us with as much or as little information about your legacy as you wish to disclose. Alternatively, please complete and return our Legacy Notification Form, by post or email. Any specific information you give us will help us to look after your gift and meet your wishes; it will be treated in the strictest confidence and does not involve you in a binding commitment.



If you have any questions about your proposed gift, please contact Carrie Scott via carrie.scott@lmh.ox.ac.uk or by telephone on **+44 (0) 1865 611024**.



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