

LEGACY PLEDGE FORM



Making a bequest is a private matter, but it would be helpful to know that you have done so. Accordingly, we invite those who pledge a legacy to Merton to update us with their current intentions, so as to give us an opportunity to express our generosity.

This pledge does not commit you in any way, but is a statement of your present intention, and is strictly confidential.

Name	
Address	
Telephone	
Email	
Maiden Name	Matriculation Year

My Will includes the following:

<input type="checkbox"/>	A residuary legacy
<input type="checkbox"/>	A pecuniary legacy (please state amount)
<input type="checkbox"/>	A specific legacy (please give brief details)
<input type="checkbox"/>	A reversionary legacy
<input type="checkbox"/>	A conditional legacy
<input type="checkbox"/>	Prefer not to say

The Purposes of my legacy

<input type="checkbox"/>	I am happy for the Warden and Scholars of Merton College to decide on the best way to use my gift.
<input type="checkbox"/>	I would prefer my gift be used for a specific benefit and would like to discuss this further.
<input type="checkbox"/>	I have left my gift for the purpose outlined below

<input type="checkbox"/>	I would like to join the Founder's Society
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<input type="checkbox"/>	I wish my bequest to remain anonymous
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Please return this notification to
The Development Office, Merton College, Merton Street, Oxford, OX1 4JD.

If you already have a Will, but now decide that you wish to include a gift to Merton, all that you are required to do is add a codicil to your existing Will. It does not alter the original content of your Will. After being witnessed, it should be sent to your solicitor to be kept with your Will.

I (full name)
Of (address)

Declare this to be a codicil to my last Will dated the day of (“my Will”).

1 In addition to any other legacies given by my Will, I give to the Warden and Scholars of the House or College of Scholars of Merton in the University of Oxford (herein after called “the College”):

<i>Insert here the amount/property</i>
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free of tax, and I direct that a receipt of the Bursar or other authorised officer for the time being of the College shall be a good and sufficient discharge to my executors for the payment of the aforesaid legacy.

2 In all other respects, I confirm my Will.

	Signed by me on the _____ day of _____ (month) _____ (year)
	Signed by me in the presence of the two witnesses below

Witness 1

Name
Address
Signature
Occupation

Witness2

Name
Address
Signature
Occupation

Merton is grateful for notification of any codicils that are completed. Written confirmation should be sent to The Development Office, Merton College using the Legacy Notification Form.
All requests for anonymity are strictly respected by the College.