

# LEGACY NOTIFICATION FORM

Making a bequest is a private matter, but we would be grateful if you could inform the College that you intend to do so. This will give us an opportunity to express our gratitude, invite you to relevant events, and keep in contact regarding your legacy gift. Please note that this form does not commit you in any way. It is a statement of your present intention and the information provided will be treated confidentially.

Name

Former name (if applicable)  Matriculation Year (if applicable)

Address

Phone  E-mail

## My Will includes the following:

Residuary legacy (please estimate value, if possible )

Pecuniary legacy (please state amount, if known )

Other (please provide details below)

## The purpose of my legacy:

I am happy for the Warden and Fellows of Merton to decide on the best way to use my gift.

I would prefer for my gift to be used for a specific benefit (please provide details below)

I would like my bequest to remain anonymous (if this option is selected, your name will not appear in any public list of Founder's Society members)

## Wording for a Will under English Law

*While we always recommend obtaining legal advice on wording, we hope you will find the following template to be a useful starting point:*

*"I give to the Warden and Scholars of the House or College of Scholars of Merton in the University of Oxford (a charity registered in England and Wales with the number 1139022), hereinafter called 'the College', [% of the residue of my estate free of tax] OR [£ free of tax] to be applied to the general purposes of the College and I direct that the receipt in writing of the Finance Bursar or other authorised officer for the time being of the College shall be a full and sufficient discharge to my executors."*

If you require a Codicil Form, or have any other questions, please contact the Development Office using the details below.

Please return this form to:

The Development Office  
Merton College  
Oxford, OX1 4JD, UK

development@merton.ox.ac.uk  
www.merton.ox.ac.uk  
+44 (0)1865 276316



MERTON COLLEGE  
OXFORD

# PRIVACY NOTICE

## How we use your data

The personal data you provide on this form will be used to meet Merton College's legitimate interests of alumni and supporter engagement, fundraising and stewardship. We will use your data to manage our ongoing relationship and engagement with you, and to send you communications and marketing activities about news, research developments, alumni benefits and services, events, exhibitions, collections and resources, reunions, volunteering opportunities, fundraising priorities and progress updates by post, email, telephone, fax or text message, unless you indicate otherwise. We will also use your data to record and/or update your contact details and communication preferences, and record any interactions or contributions you have made to college life.

## Who has access to your data?

The data you provide will be stored and shared across the collegiate University of Oxford, including with its relevant clubs and societies if appropriate, in accordance with the University's policies and procedures via our shared relationship management system. You have the right to object to the processing of your personal data at any time. The University and participating colleges are both "data controllers", meaning you can contact either the University or your college if you have questions about your data.

We may also need to share your data with third-parties working on our behalf to assist with our communications (e.g. mailing houses, printers) and events (e.g. external venues, caterers). We will only do this in appropriate circumstances, for specified purposes, by secure means, and with the relevant data sharing agreements in place. We do not and will not sell your data.

## How long we keep your data

We consider our relationship with our alumni, donors and supporters to be lifelong and we will retain most of your data indefinitely unless you request otherwise.

## Your rights

You have the right to opt-out of direct marketing at any time. You also have the rights to request access to and correction or erasure of your data; to request transfer of your data to another party; and to object to the processing of your data or request that such processing is restricted.

For full details on how we treat your information, including your rights, please see our Privacy Notice at <https://www.merton.ox.ac.uk/privacy-notices-and-ropas> or you can request a hard copy from our Development Operations & Data Manager. If you would like to exercise your rights, opt-out, or are dissatisfied with the way we have used your information, please contact us at [development@merton.ox.ac.uk](mailto:development@merton.ox.ac.uk) or telephone +44 (0)1865 286314. You may also contact our Data Protection Officer at [development@merton.ox.ac.uk](mailto:development@merton.ox.ac.uk). If you remain dissatisfied, you may lodge a complaint with the Information Commissioner's Office at: [ico.org.uk/concerns](https://ico.org.uk/concerns).

