REMEMBERING MAGDALEN IN YOUR ESTATE PLANNING

INVEST IN EXCELLENCE
Your estate planning is your opportunity to provide for your family, friends and the organisations that have influenced and shaped your life. For most people it is the one opportunity they have to make a significant financial contribution to the people and causes that they care deeply for. If you believe that you benefited from your time at Magdalen and you would like future generations to share your experience, please consider setting aside a small percentage of the residue of your estate to Magdalen. A charitable bequest is a simple, tax-efficient way to support your College which will allow us to continue a tradition of excellence in teaching and research for generations to come.

WHY REMEMBER MAGDALEN IN YOUR ESTATE PLANNING?

Magdalen is becoming ever more reliant on its endowment to continue to deliver an outstanding educational experience to our students. Your bequest will make a huge and lasting impact.

A charitable bequest:

- Can be made direct to Magdalen College. (charity no. 1142149)
- Is deductible for federal estate tax purposes, and there is no limit on the amount of the estate tax charitable deduction.

Further information about the tax benefits of giving in your will can be found at: www.oxford.planyourlegacy.org
HOW WILL YOUR CHARITABLE BEQUEST HELP THE COLLEGE?

AN UNRESTRICTED CHARITABLE BEQUEST gives the College the flexibility to use your gift in the most effective way, giving support to areas of greatest need.

A RESTRICTED CHARITABLE BEQUEST can reflect your own interests and priorities, which might include the buildings and grounds, the Boat Club, the Choir, a bursary or a fellowship.

MAGDALEN COLLEGE ENDOWMENT

The College’s endowment is split between equities, property and other investments. This vital resource is actively managed by the College Investment Committee, which is made up of four alumni, chosen for their expertise in investing in all asset classes, and five Fellows.

Returns on the investment are used to maintain the buildings and grounds, as well as giving vital financial support to teaching. To fully cover the shortfall in funding for teaching and other student needs, Magdalen’s endowment will need to be significantly increased in the coming years.

HOW DOES MAGDALEN’S ENDOWMENT COMPARE TO US UNIVERSITIES?

At $287m, Magdalen’s endowment is significantly smaller than American universities of a similar academic standing, and the endowment per student is also significantly lower. Based on 2014 figures, Magdalen’s endowment would be ranked 249th in the US, between Utah State University and Connecticut College.*

ENDOWMENT PER STUDENT:

<table>
<thead>
<tr>
<th>University</th>
<th>Endowment (bn)</th>
<th>Per Student</th>
</tr>
</thead>
<tbody>
<tr>
<td>Harvard</td>
<td>$35.9bn</td>
<td>$1.7m</td>
</tr>
<tr>
<td>Yale</td>
<td>$23.9bn</td>
<td>$1.9m</td>
</tr>
<tr>
<td>Stanford</td>
<td>$21.4bn</td>
<td>$1.4m</td>
</tr>
<tr>
<td>Princeton</td>
<td>$2bn</td>
<td>$2.6m</td>
</tr>
<tr>
<td>Magdalen</td>
<td>$0.287bn</td>
<td>$419k</td>
</tr>
</tbody>
</table>

*Data from National Association of College and University Business Officers, found at http://www.hughcalc.org/endow.cgi?srt=R&state=ALL&state2=NONE.
Making a charitable bequest to the College is essentially a private matter, but it would be helpful to know that you have done so. Accordingly we invite all those who have made charitable bequests to Magdalen to update us with their current intentions, and so give us the opportunity to show our appreciation of their 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:
- A residuary legacy
- A specific legacy (please give brief details)

I should prefer my bequest to be used as follows:
- Where the need is greatest
- The College Endowment
- Supporting tutorial teaching
- Supporting students in need
- Buildings and Grounds
- Boat Club
- Chapel and Choir

Other

I would like to join the Fastolf Society
I wish my bequest to remain anonymous
I give permission for my name to be published in the College’s list of donors by charitable bequest
Please send me details of other planned giving (charitable trusts, life insurance, retirement assets, etc.)

Please send this notification to:
Dr Marilyn Bowler
Associate Development Director
The Development Office
Magdalen College
Oxford OX1 4AU
THE FASTOLF SOCIETY

To recognise the major impact of bequests to Magdalen and to thank members for their generosity, we invite all who remember Magdalen in their estate planning to join The Fastolf Society. The Society is named after Sir John Fastolf, an outstanding English commander in the Hundred Years War, whose wealth became a founding endowment for Magdalen College. The Society’s programme includes an annual lunch in Hall hosted by the President and exclusive events for members in the US.

Including Magdalen in your estate planning

A charitable bequest to Magdalen should refer to the College by its full official title:

Magdalen College, Oxford. Charity number 1142149.

We also advise you to do your estate planning in consultation with your family and your attorney.

The Notification Form

If you decide to leave a charitable bequest to Magdalen, we would be grateful if you could let us know by completing the Notification Form enclosed in this brochure. You do not need to give specific details of your bequest if you do not wish to; nor is the pledge binding; it is simply a statement of your present intentions.
Support for a College like Magdalen is more important now than ever as it seeks to maintain the standard of excellence which we all enjoyed as old members in the face of financial constraints. I had the good fortune to have a wonderful education at Amherst and Harvard, and my time at Magdalen caused me to raise my aspirations. The reason why I favor Magdalen so highly in my charitable giving is that my support can have a greater beneficial effect on the College than it would by adding to the already considerable resources of Amherst and Harvard or other similar institutions.

Paul Dodyk (1959)

If you would like to discuss making provision for Magdalen in your estate planning, in confidence and without obligation, please contact:

Dr Marilyn Bowler
Associate Development Director
The Development Office
Magdalen College, Oxford OX1 4AU
T: +44 (0) 1865 286682
E: development.office@magd.ox.ac.uk

Invest in the future
Provide opportunities for generations to come