



QUEEN'S
UNIVERSITY
BELFAST

QUEEN'S
FOUNDATION

DO SOMETHING
AMAZING

Leaving a Gift in your Will to Queen's



I AM DELIGHTED
TO BE PART OF
THIS GREAT
UNIVERSITY

Professor Ian Greer
President and Vice-Chancellor



The Wellcome-Wolfson Institute for
Experimental Medicine at Queen's

WELCOME

I am delighted to be part of this great University - a world-class university - ranked in the top 180 in the world (QS World Rankings 2019).

Working in partnership with alumni and friends, industry, government and local communities, we are committed to meeting the needs of society – economically, culturally and socially – and to addressing global challenges.

We have much to celebrate in Queen's contribution to life in Northern Ireland and beyond – not least, the unique ability to combine the benefits of a significant regional focus – contributing £1 billion to the Northern Ireland economy – with a much larger national and international role.

And philanthropy is underpinning all these areas – changing lives, and ultimately improving the world for us all. Thank you for your interest in supporting the work of Queen's University through a gift in your will.

Since its foundation over 170 years ago, Queen's University has been the fortunate and very grateful beneficiary of legacy gifts. In the last six years alone, legacies have contributed over £8 million to the Queen's University of Belfast Foundation –

gifts which are quietly helping shape our world-class campus and inspiring great minds to tackle pressing global challenges. Their impact is extensive.

Along with lifetime donations, legacy gifts help us to award over £6 million annually in scholarships and bursaries to ensure that young people with talent can come to Queen's, regardless of their background, and benefit from the transformational opportunities that a world-class education presents.

Legacies also fund life-changing research, seeking to overcome some of the major health problems of our time, including cancer, cystic fibrosis, asthma and Multiple Sclerosis.

There has never been a more vital time to invest in the life of the University. If you are considering a charity gift in your will, and after you safeguard your loved ones, please consider Queen's. Regardless of size, each and every gift is an investment in the future of education and research in Northern Ireland and beyond.

Thank you for taking the time to read this booklet and for considering Queen's University as part of your legacy.

Professor Ian Greer

Nearly 10,000 people are diagnosed with cancer every year in Northern Ireland. Applying our research to trials and treatments has a direct impact in improving patient outcomes and their quality of life. Legacy gifts help fund this process.

Professor Joe O'Sullivan
Professor of Radiation Oncology,
Queen's University Belfast
Consultant Oncologist, The
Northern Ireland Cancer Centre,
Belfast City Hospital



WHAT CAN BE ACHIEVED THROUGH YOUR LEGACY GIFT?

Every year Queen's University gratefully receives legacy gifts ranging from several hundred pounds to six-figure sums.

Each gift makes an impact – investing in pioneering medical research, supporting students in their studies and tackling head-on the greatest global issues facing society.

FUND LIFE-CHANGING MEDICAL RESEARCH

Would you like to become part of the solution to the major health problems of our time, including cancer, cystic fibrosis, asthma and Multiple Sclerosis?

The chances are that your life or that of a loved one has been touched by medical research. For generations, Queen's has educated doctors, nurses, and healthcare professionals who go on to serve society at home and abroad.

Focused on speeding up the process of taking laboratory discoveries through to the patient's bedside, the Institute of Health Sciences at Queen's brings together significant international programmes impacting global healthcare, by developing new ways to prevent and treat disease. Improving outcomes for patients lies at the heart of everything we do. We are developing new diagnostic tests and treatments for cancer, respiratory disease, eye health, cardiovascular disease and Multiple Sclerosis.

Our work in many fields of medicine has won global acclaim and is attracting gifted international researchers to the University. Survival rates for cancer in Northern Ireland are now among the best in the UK. Through choosing to support this important area of our work, you are showing that you trust in our established reputation as leaders in the field of medical research.



£2,000

Could buy an instrument needed to **extract** pure samples of **DNA from cancer cells**, helping us to identify possible causes and treatments.



£10,000

Could fund an **undergraduate student bursary** in the subject area of your choice.



£100,000

Could fund an **annual visiting Professorship** for a scholar of international acclaim or **purchase vital equipment** to support the study of infectious diseases.



As graduates ourselves, we feel fortunate to have obtained a Queen's University education. For us, it represents a world of opportunities, lifelong friendships and treasured memories – all of which have stayed with us long beyond our graduation day.

Leslie and Hilary Morrison
Legacy pledgers

“

Legacy gifts which fund scholarships and bursaries help raise the aspirations of talented young people from all backgrounds, unlocking potential and attracting individuals who will go on to contribute to Northern Ireland's success around the world.

”

INSPIRE THE GREATEST MINDS

Would you like to ensure that young people with talent can come to Queen's, regardless of their financial background?

Queen's is a university for everyone, where a student's ability, potential and commitment to learning come first - not their personal or social circumstances. Our dedicated Widening Participation team works closely with teachers, parents, schools and colleges to build relationships with children from primary school age upwards.

Pupils can benefit from a wide range of programmes to help raise their aspiration and attainment levels and help them consider university as an option for their future.

These initiatives culminate in the Pathway Opportunity Programme where successful pupils are offered a guaranteed conditional offer to study at Queen's.

SUPPORT WORLD-CLASS RESEARCH

You can also choose to support research in other areas throughout the University, including our Global Research Institutes, which are aligned to tackling global challenges facing society.

The Institute for Global Food Security plays a major role in delivering safe, sustainable and authentic food to the world's population, and has become globally recognised for its excellence in research.



Computer Science Building

The Senator George J. Mitchell Institute for Global Peace, Security and Justice links peace-making with social transformation, examining the need for reform of state institutions alongside cultural and social healing. It brings together researchers from fields as diverse as politics and computer engineering.

The Institute of Electronics, Communications and Information Technology (ECIT) is host to the award-winning UK Innovation & Knowledge Centre for cyber security and the Centre for Secure Information Technologies. ECIT also houses the Centre for Wireless Innovation and The Centre for Data Science and Scalable Analytics Systems.

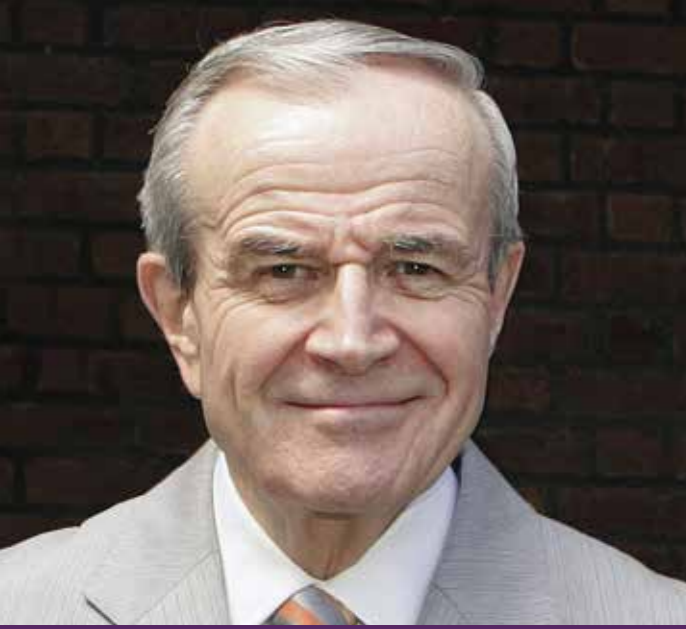
SUPPORT A WORLD-CLASS CAMPUS

Queen's has more than 250 buildings, some 120 of which are listed as being of architectural merit. As well as maintaining and preserving these buildings, the University must also ensure it meets the increasing demands of growing student numbers through provision of new facilities. Many of these have been made possible through philanthropic gifts such as legacies.



I was diagnosed with Multiple Sclerosis in 2013. My mother had been diagnosed in her thirties, so I understand first-hand the devastating impact it can have on family life. After my father passed away in 2014, I decided to reserve my parents' collection of rare and valuable motorbikes as a legacy gift to support ground-breaking MS research at Queen's.

Caroline Jamison
Legacy pledger



WHY LEAVE A GIFT TO QUEEN'S IN YOUR WILL?

AN INVESTMENT IN THE FUTURE

Established in 1845, Queen's University is at the forefront of developing new technologies and ideas which bring about transformational change to society. We want to continue to do so for many years to come. When you choose to leave a charitable legacy to Queen's, you become part of the solution.

IT CAN REDUCE THE AMOUNT OF INHERITANCE TAX YOU PAY ON YOUR ESTATE

The Queen's University of Belfast Foundation is a registered charity (NIC 102044) and is thereby exempt from Income and Inheritance Tax (IHT). This means you could reduce the amount of tax you pay on your estate.

Gifts of stocks, shares or property can also reduce the tax burden on your estate.

THE '10% RULE'

In the UK the nil-rate band is £325,000 (2018-19 tax year) and IHT is charged on any sum above that threshold. It is worth bearing in mind that if you leave 10% or more of your estate to a registered charity in your will, you may reduce the rate of tax above the threshold from 40% to 36%.

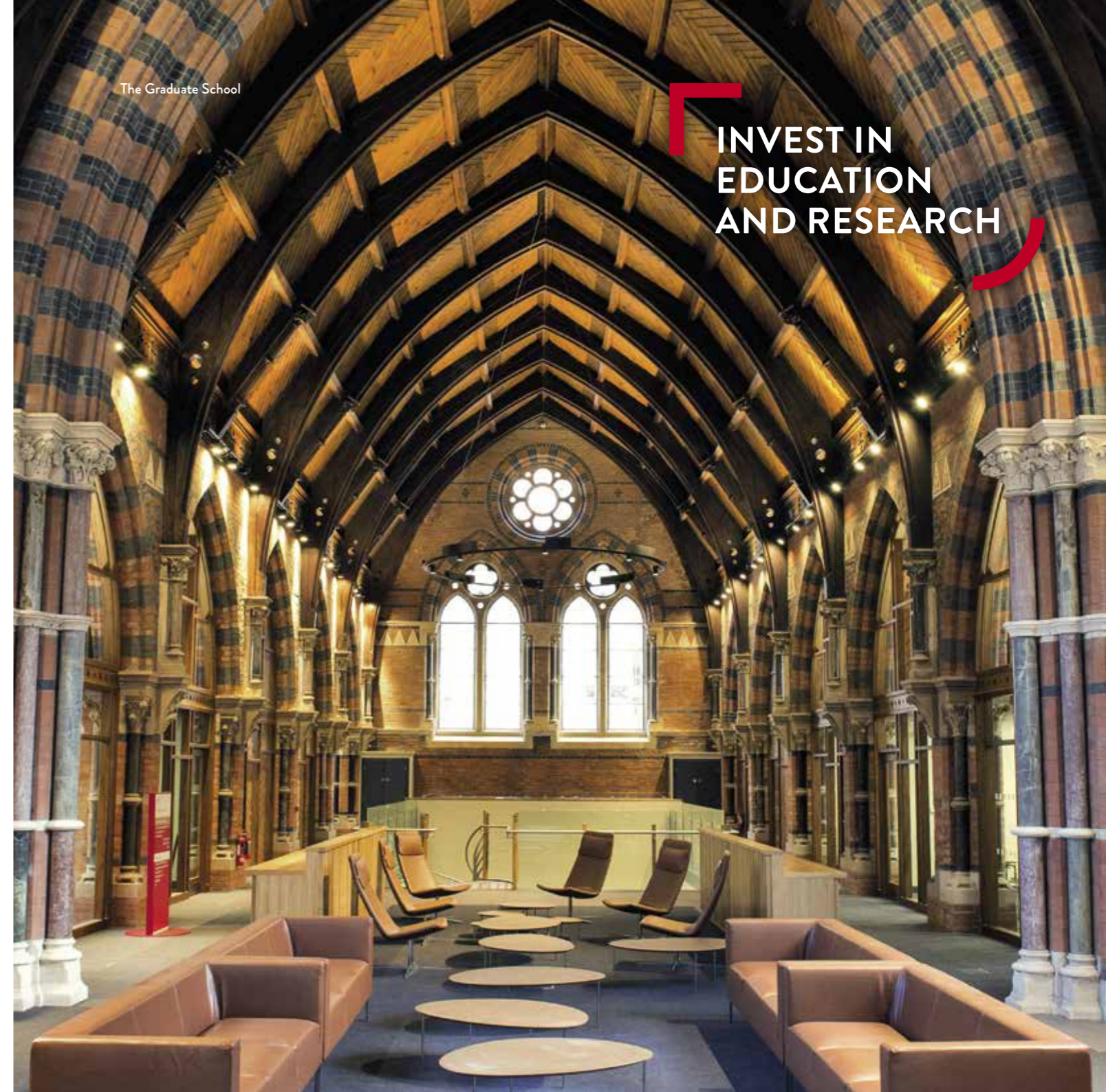
We strongly advise consulting your solicitor, accountant or financial advisor for more details.

Thanks to the sacrifices my father and mother made, I obtained a university education with all the career and other opportunities that such an education brings. Hence I can think of no more fundamentally worthwhile use of my legacy gift than helping young people benefit from a world-class education, with all the life-enhancing benefits that brings.

Professor Sir George Bain
Former Vice-Chancellor
of Queen's University Belfast

The Graduate School

INVEST IN
EDUCATION
AND RESEARCH



CREATE OPPORTUNITIES FOR EVERYONE



PLANNING A GIFT IN YOUR WILL TO THE QUEEN'S UNIVERSITY OF BELFAST FOUNDATION

Your will is an important document which details your future wishes and we strongly suggest that you seek professional advice when drafting it.

The easiest way to update an existing will is through a codicil document. A template codicil is inserted in the back sleeve of this brochure.



Pathway Opportunity Programme students



£500

Could support a student with essential course materials or equipment.



£5,000

Could provide specialist books for the library, or new sports equipment for student clubs and societies.



£50,000

Could refurbish a teaching space or provide a travel scholarship.



£500,000

Could provide a state-of-the-art lecture theatre.



“

Each gift makes an impact – investing in pioneering medical research, supporting students in their studies and tackling head-on the greatest global issues facing society. ”

TYPES OF LEGACY GIFT

There are several ways you may wish to leave a gift in your will.

Residuary Legacy

A percentage or fraction of your estate after taxes, charges and other legacies have been settled.

Pecuniary Legacy

A cash sum of money. You may wish to discuss with your advisor how to protect the real value of your gift from inflation over time.

Specific Gift

A gift of specific property, such as land, buildings, shares, copyrights, paintings or other property.

HOW TO WORD YOUR GIFT

We are happy to discuss your will wording and draft some options for you to consider.

You may also find the following wording helpful when you and your solicitor are considering your gift to Queen's:

'I give to The Queen's University of Belfast Foundation (charity number: NIC102044) the sum of (insert amount in words) pounds (£ insert figure), or (insert percentage in words) percent (insert figure %), for (insert purpose); and I direct that the receipt of the Trusts Administrator or other proper officer of the Trust shall be a sufficient discharge to the executors for this gift.'

If you would like to be more specific about how your gift is used, then please add the following wording:

'I express the wish, without creating any trust or imposing any other legally-binding obligation, that... e.g. preference be given to medical research/ undergraduates studying Engineering'

INTERNATIONAL LEGACY GIFTS

Canada

If you are resident in Canada, a bequest made to Queen's University Belfast is deductible for estate tax purposes, and there is no limit on the amount of the estate tax charitable deduction.

The suggested wording of a Canadian bequest is:

'I direct my Estate Trustee to transfer as a gift to Queen's University Belfast (an educational institution specifically designated for charitable donations under the Income Taxes Act (Canada) and Regulations [Section 3505] thereto) (the sum of \$____) or (____% of my estate), to be used for the benefit of Queen's University Belfast.'

USA

Legacy gifts from USA taxpayers can be channelled through 'Friends of The Queen's University of Belfast, Inc.' ('the Friends') – an organisation in the USA, which has charitable status under section 501(c) (3) of the USA Internal Revenue Code. This means that if you are a USA taxpayer, you can offset a donation to 'the Friends' against your tax bill.

The following example may be tailored to best suit your particular financial circumstances. To create a bequest for immediate use, the preferred phrase is:

'I give (the sum of \$____) or (____% of my estate), to Friends of The Queen's University of Belfast, Inc., a 501(c) (3) charity, for the benefit of Queen's University Belfast (if your bequest is for a specific purpose, state the purpose), although I understand that this request is not binding on the part of the Trustees.'

Europe and the rest of the world

Queen's is the fortunate beneficiary of legacy gifts from around the world. If you wish to talk to us about an international legacy gift, please get in touch and we can help you plan your future gift to the University.



Thanks to a legacy scholarship, I was able to complete my Master's in Advanced Food Safety in the Institute for Global Food Security at Queen's. Due to the skills and experience which I gained throughout the course, I have now secured gainful employment.

Amy McSparron
Beneficiary of the Katharine Harris legacy scholarship gift



THANK YOU

Thank you for taking the time to read this booklet and for considering Queen's University as part of your legacy.

If you have already chosen to support Queen's University Belfast through a legacy gift, we are immensely grateful. Thank you.

We appreciate the details of your will are private, so please be assured that if you choose to let us know of your plans involving a future gift to The Queen's University of Belfast Foundation, the details will remain confidential and will not be seen as binding.

THE LANYON SOCIETY

The Lanyon Society is a unique group of individuals who are considering or have chosen to leave a gift to Queen's in their will. If you wish, you can let us know of your plans by returning The Lanyon Society form in the back sleeve of this brochure.

It is beneficial to us to understand how our donors are planning to help. This allows us to ensure that all aspects of your intentions involving the University are fully understood.

It is also a pleasure for us to be able to thank you personally for the gift that you have planned and to recognise your generosity in a way that is appropriate for you.

By becoming a member of The Lanyon Society, you can choose to receive regular updates on developments at Queen's, notifications of selected University events and an invitation to a special annual donor event, should you wish.



Business Card

IF WE CAN ASSIST YOU FURTHER

If you would like to speak to someone about leaving a gift in your will, please contact:

Susan Wilson

Legacy Manager

Development and Alumni Relations Office

Queen's University Belfast

BT7 1NN.

Tel: +44 (0)28 9097 3162 or

Email: susan.wilson@qub.ac.uk



**QUEEN'S
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BELFAST**

QUEEN'S
FOUNDATION

The Queen's University of Belfast Foundation

Since its establishment in 1999, The Queen's University of Belfast Foundation has been engaged in generating financial support for Queen's capital development programmes and academic initiatives from private individuals, charitable trusts and corporations. A core part of our work is fostering lasting relationships with donors who share Queen's vision for the future.

The work of the Foundation is consistent with the University's mission to be a world-class university that links Northern Ireland to the global community through the life-changing experience we offer to our students, the distinctive contribution made to society by our graduates and the high quality and impact of our research.

**The Queen's University
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Queen's University Belfast
BT7 1NN**

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**Registered charity number: NIC 102044
www.queensfoundation.com/legacygifts**