



Leaving a Legacy to the University of New England

Thank you for your interest in including the University of New England (UNE) in your Will. To assist you, we have prepared some suggested clauses. We strongly recommend that you consult your legal adviser to ensure that your estate plan is applied in accordance with your wishes.

For all opportunities outlined below, you may choose to specify a specific dollar sum of money, a particular asset such as art or real estate, or a residual percentage of your estate which allows you to ensure other family members and administration costs are covered first.

Should the following suggestions not meet your requirements, UNE's Office of Advancement is able to discuss your preference in confidence either by phone or by meeting with an appropriate representative. Please telephone (02) 6773 2870 or email advance@une.edu.au for further enquiries.

1. Unrestricted Legacy Gift

Unrestricted gifts provide UNE with the flexibility to use your donation where it is most needed and/or where there will be the greatest impact.

The suggested wording of an **unrestricted gift** is:

I give [specify dollar amount or percentage of estate or nature of asset or gift] to The University of New England ABN 75 792 454 315 at Armidale, New South Wales to support the general purposes of UNE.

2. Specific Legacy

You may nominate a particular activity, field of study, research priority or a scholarship to benefit from your gift. Please speak with UNE's Office of Advancement to discuss your interests and objectives to ensure that your gift is used to its fullest potential and that your wishes are met.

The suggested wording of a **specific legacy** is:

A particular activity or field of study

I give [specify amount or proportion of estate or nature of asset or gift] to The University of New England ABN 75 792 454 315 at Armidale, New South Wales and I express the wish that this legacy is applied for the purposes of [describe, e.g. books for the UNE Law School Library, student theatre productions] and that these funds are managed in accordance with UNE's financial management policies of the time. If that

purpose is discontinued or not available for whatever reason, then I express the wish that my legacy be applied to an allied field of study or such other purposes as in The University of New England's view most closely matches my intentions as described above.

3. Scholarships

Creating a New Scholarship

Your bequest can be applied to fund a new Scholarship in your name (or anonymously if you prefer), a research project or in memory of someone. Options for a new Scholarship include \$5,000 per annum for a travel scholarship, \$7,000 per annum for a living expenses scholarship and \$10,000 per annum for a residential scholarship. The Office of Advancement is happy to discuss alloptions to suit your legacy goals and financial wishes.

The suggested wording of a **scholarship** legacy is:

I give [specify amount or proportion of estate or nature of asset or gift] to The University of New England ABN 75 792 454 315 at Armidale, New South Wales. I express the wish that The University of New England should apply this legacy to provide scholarship/s for [specify recipients, gender and area of study or subject] and that these funds are managed in accordance with the UNE's financial management policies of the time. It is my wish that the said scholarship be known as _____ [specify name if suitable], in the area for which it is awarded. If that field of study is discontinued or not available for whatever reason, then I express the wish that my legacy be applied to an allied field of study or such other purposes as in The University of New England's view most closely matches my intentions as described above.

4. Supporting Existing Scholarships

You can also consider contributing any amount to support an existing scholarship or research project. Please contact the Office of Advancement (or have your legal adviser do so) to discuss available scholarships.

The suggested wording of a contribution to an **existing scholarship** is:

I give [specify amount or proportion of estate or nature of asset or gift] to The University of New England ABN 75 792 454 315 at Armidale, New South Wales. I express the wish that The University of New England should apply this legacy to support the existing scholarship in Scholarship studies [specify area of study or subject] and that these funds are managed in accordance with UNE's financial management policies of the time. If that field of study is discontinued or not available for whatever reason, then I express the wish that my legacy be applied to an allied field of study or such other purposes as in The University of New England's view most closely matches my intentions as described above.

5. Research

You may nominate your legacy to be applied to fund an area of Research that would benefit from your gift. Please speak with UNE's Office of Advancement to discuss your interests and objectives to ensure that your gift is used to its fullest potential and that your wishes are met.

The suggested wording of a **research project** legacy is:

I give [specify amount or proportion of estate or nature of asset or gift] to The University of New England ABN 75 792 454 315 at Armidale, New South Wales. I express the wish that The University of New England should apply this legacy to support a research project in studies [specify area of study or subject] and that these funds are managed in accordance with The University of New England's financial management policies of the time. If that field of study is not available for whatever reason, then I express the wish that my legacy be applied to an allied field of research or such other purposes as in The University of New England's view most closely matches my intentions as described above.

Other information and Tax considerations

The UNE Foundation receives and administers donations on behalf of The University of New England with the full support of the UNE Council and Executive. Established in 2000, [The Trustee for UNE Foundation](#) supports the vision and strategy of the University by responsibly investing donated funds and strives to oversee the best financial return possible from funds held in trust, while balancing the immediate and longer-term needs and wishes of stakeholders including donors, students and the University.

Should you wish to discuss your intended gift or if you have any queries at all regarding this matter, please contact the Office of Advancement on (02) 6773 2870 and they will be happy to assist.