



## **Ways of Giving to Oxford University For U.S. Donors**

Tax-deductible contributions may be made by giving to Americans for Oxford, Inc.  
Gifts may be sent to:

Neil Simpkins  
Chairman  
Americans for Oxford, Inc.  
500 Fifth Avenue, 32<sup>nd</sup> Floor  
New York, NY 10110  
Tel: (212) 377-4900  
Fax: (212) 889-4052

Americans for Oxford, Inc. has been determined by the United States Internal Revenue Service to qualify, under sections 501 (c) (3) and 509 (a) of the Internal Revenue Code, as a tax-exempt public charity to which tax-deductible contributions may be made.

To maintain the deductible status of gifts, U.S. law requires that the Board of Directors retain control and discretion concerning grants to Oxford. Although gifts to Americans for Oxford, Inc. must be unrestricted, the Board of Directors will certainly consider specific preferences of donors.

Therefore, in a letter accompanying a contribution or in a pledge letter establishing a multi-year commitment for a designated purpose, the language must be non-binding. Sample wording is as follows:

- It is my preference that the contribution be used for the benefit of (entity) OR
- I hope the Board will apply my contribution to (entity) OR
- I wish the money to be used for (entity) OR
- I would like/prefer that the money be used for (entity)

Upon receipt of a gift, Americans for Oxford, Inc. will acknowledge the contribution in writing. Effective January 1, 1994, the Internal Revenue Code requires organizations to

acknowledge contributions in writing and to state that they provided no goods or services in consideration for the gift.

It is important that the acknowledgement letter be kept with the donor's tax records. The charitable deduction may be disallowed if you are unable to provide the acknowledgement to the Internal Revenue Service upon request.

## **Ways of Giving**

### **Cash Gift**

Checks should be made payable to Americans for Oxford, Inc.

### **Wire Transfer**

A wire transfer may be directed to Americans for Oxford, Inc. Please contact [gifts@oxfordna.org](mailto:gifts@oxfordna.org) to retrieve the relevant account details.

### **Credit Card**

Gifts to Americans for Oxford, Inc. may be charged to the donor's Visa, MasterCard, or American Express card. Please include the account name, billing address, credit card number, expiration date, amount of gift and preferred recipient. **Please do not send credit card details via e-mail; post, courier and fax are acceptable.**

### **Gift of Securities or Property**

A gift of appreciated securities or property may offer significant tax advantages. Please direct inquiries concerning these types of gifts to Americans for Oxford, Inc. at [gifts@oxfordna.org](mailto:gifts@oxfordna.org) to retrieve the relevant account details.

### **Online Gift**

Visit <http://www.oxfordna.org/donate> to make a gift online.

### **Corporate Matching Gift**

Americans for Oxford, Inc. can accept all tax-deductible contributions from corporate matching gift programs.

Thank you for considering a gift to the Oxford University. If you have any questions or need further information, please call 1-212-377-4900 or e-mail [gifts@oxfordna.org](mailto:gifts@oxfordna.org).

### **Bequests**

Bequests can be made to Americans for Oxford, Inc. benefiting a University of Oxford College or Department.

*We strongly advise you to consult with your attorney so that your will is legally sound and in compliance with federal and state laws governing charitable gifts.*

There are different forms of bequests, requiring exact language, examples of which are provided below:

### ***An Outright Bequest***

"I give and bequeath to Americans for Oxford, Inc. for the benefit of 'Recipient' in the University of Oxford the sum of \_\_\_\_ dollars exclusively for its charitable and educational purposes."

### ***A Residuary Bequest***

"All (or \_\_\_\_%) of the rest, residue and remainder of my estate which I may own or be entitled to at the time of my death, I give, devise and bequeath to Americans for Oxford, Inc. for the benefit of 'Recipient' in the University of Oxford exclusively for its charitable and educational purposes."

### ***A Bequest of Property***

Some forms of property have uses that may make them valuable to a College or Department in their present form. Others may be of greater value to the college if it sells them and uses the proceeds for endowment. Suggested language for a Bequest of Property is provided below:

"I hereby give my (full description of item and location) to Americans for Oxford, Inc. for the benefit of 'Recipient' in the University of Oxford exclusively for charitable and educational purposes. If, after diligent evaluation of the property, it appears to be impractical to maintain the property for educational purposes, I authorize the sale or disposition of the property at their sole discretion."

Other forms of bequests are also possible, for example:

### ***A Contingent Bequest***

A Contingent Bequest stipulates that a "Recipient" will receive a portion of the estate only if one or more of the beneficiaries fail to survive you.

### ***A Testamentary Trust***

A Testamentary Trust is established by Will at the time of death and uses all or a portion of the estate to care for one or more beneficiaries. Upon the death of the surviving beneficiaries, the principal passes to a "Recipient".

*Again, please consult with your attorney to ensure that your will is legally sound and in compliance with federal and state laws governing charitable gifts.*