Making a legacy bequest from the US: Leaving a lasting impact
For over six centuries legacies have made a vital contribution to the life of the University of St Andrews, with the support of earlier generations creating an enduring foundation for the success of future students.

A legacy bequest is one of the most personal gifts you can make to St Andrews.

In recent years bequests have played a central role in the realisation of the Laidlaw Music Centre, the building of the Scottish Oceans Institute, the renovation of the Wardlaw Museum and the funding of a significant number of undergraduate and postgraduate scholarships.

We would be delighted to help you find out more about how to plan your gift to the University of St Andrews.

Once you let us know your wishes, we will invite you to become a member of the Chancellor’s Circle, which was founded to recognise and thank those generous alumni and friends who have chosen to remember the University in their will.

Robert Fleming
Director of Development

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Why leave a legacy?

Your legacy gift gives you the chance to:

• leave a lasting impression on your University
• educate tomorrow’s brightest minds
• remove financial barriers for the most talented students
• provide essential facilities to drive world-leading teaching and research
• inspire a student to discover new interests
• conserve our outstanding historic collections for future generations
• give something back to the community of St Andrews
How to leave a legacy

The American Foundation of the University of St Andrews has existed as a registered US charity for more than 50 years. Gifts to the University of St Andrews American Foundation are tax-deductible for US donors. Bequests for the benefit of the University of St Andrews can be made to the University of St Andrews American Foundation, which is registered in the State of Georgia and is exempt from tax under 501(c)(3) and 509(a)(3) of the IRS code.

A gift in your will or naming St Andrews as a beneficiary of your retirement plan can reflect your personal interests, or you may wish to leave an unrestricted gift which will be used where need is greatest. We would be happy to work with you to help you plan the purpose of a gift that is appropriate for you. Leaving a legacy is straightforward and if you are thinking of leaving a gift to us our North American Team would welcome the opportunity to discuss your intentions to ensure that the University will be able to honour your wishes.

At the back of this booklet you will find a pledge form to let us know your intentions. You have our assurance that these will be kept confidential.

Once you let us know your wishes, we will be happy to welcome you to the Chancellor’s Circle to recognise and celebrate your generosity.

How to word a legacy

We recommend you consult an attorney to draft your will. Your attorney should use the following form of words to suit your needs:

I give to the University of St Andrews American Foundation Inc., EIN 58-1662222, a public charity described in sections 501(c)(3), 509 (a) (1) and 170(b)(1)(A)(vi) of the Internal Revenue Code c/o Alston and Bird, 1201 West Peachtree Street, Atlanta, GA 30309-3424, the sum of [in words] OR a [in words] percentage share of the residue of my estate OR my [detail your specific item or items] to be used for the general purposes of the said Foundation OR to be used for [detail the specific purposes you have] and I declare that receipt by the Trustees of the said Foundation shall be a full and sufficient discharge to my Executors and Trustees.

Declaring that:-

(1) If the University of St Andrews American Foundation Inc. has changed its name or has amalgamated with or transferred its assets to any other body or has been wrongly designed then my Executors/Trustees shall give effect to such legacy or entitlement as if it has been made to such new or succeeding body or failing which to the University Court of the University of St Andrews (Scottish Charity Number SC013532), Fife, Scotland: and

(2) Receipt by the Trustees of any succeeding body or the receipt of the Quaestor or other officer authorised by the Principal of the University of St Andrews shall be a full and sufficient discharge to my Executors and Trustees.’

It is also possible to name the American Foundation of the University of St Andrews as a beneficiary of your IRA, 401(k) or other qualified plan.
How a legacy can support a promising student

Robert of Montrose and Lord Douglas gave the first donations to the University in 1419. Since then, the gifts and legacies of our alumni and friends have been, and continue to be, crucial to our success: they have enabled the University to establish the scholarships, awards and bursaries required to support promising students who might otherwise struggle with the cost of studying at St Andrews, and enable them to reach their full academic potential.

Emmanuel Olowe is such a student: an undergraduate studying Computer Science and Mathematics, he is the recipient of the Dr Gordon H Carruthers Wardlaw Scholarship. Emmanuel acknowledges the impact that this bequest has had on his experience at university.

“... I was born in Lagos, Nigeria but I have spent 16 of my 20 years in Glasgow. I would like to thank you so much for this scholarship. Without it – especially in my first year at St Andrews – I couldn’t have had so many positive experiences, I would have faced major financial problems and this would have put a great financial strain on my parents. I will always be grateful! ...”

Emmanuel Olowe, second-year undergraduate Dr Gordon H Carruthers Wardlaw Scholarship

Barbara Ure (née Miller) graduated in 1941 and went on to teach for 20 years at Sunnyside Primary School, Alloa. When she died in 2016 her generous legacy to St Andrews enabled the creation of undergraduate scholarships for students from Scottish state schools. Lucy Mathieson is the first recipient of the Barbara Bennett Ure Scholarship and is studying Earth Sciences.

“I was brought up in the small coastal town of Ardrossan in the west of Scotland. For the majority of my childhood, I was looked after by my Gran as my Dad spent most of his time working in Glasgow. I attended quite a large secondary school with roughly 1,400 pupils, where the classes were often too large. Coming to the University of St Andrews – where there are only eight people in any of my tutorial groups – has therefore made quite a difference!

I am working towards a Masters in Geology by 2021, so have now finished my penultimate year. I am trying my best to graduate with a First and having my scholarship means that I have been able to focus on my studies without the need to have a part-time job.

I would like to thank my kind donors a thousand times over. Your generosity has been – and continues to be – life-changing. Each year at university has brought with it a wealth of new opportunities that I wouldn’t have been able to take advantage of without the scholarship. I certainly wouldn’t have been able to study at St Andrews without it!...”

Lucy Mathieson, fourth-year undergraduate MGeol Earth Sciences Barbara Bennett Ure Scholar
Sports scholarships

As a world-leading university, we pride ourselves on our ability to attract the brightest minds. Now that we’ve made a significant investment in sport, we are also able to attract some of the best student athletes.

We have developed a range of offers at undergraduate and postgraduate level to attract and then support our best athletic students and to help them achieve their goals on both sporting and academic fronts.

Emily Dark, third-year undergraduate BSc Physics and Scott Lang High Performance Athlete

How a legacy can enrich intellectual life

Legacies make it possible to promote the intellectual life of the University by supporting visiting lecturers, fellowships and permanent academic posts. This in turn enables us to continue to lead the academic field.

One such legacy was made in 1889 in the name of Alexander Berry, who came to St Andrews to study Classics and Logic. He went on to establish the first European settlement on the south coast of New South Wales in Australia (now known as Berry). Because of this bequest we have had a Berry Chair in English ever since and, as a result, have fostered the international reputation of the School of English as a centre for both academic research and literary creativity.
How a legacy can benefit research

Cutting-edge research is the lifeblood of any university, and we depend on donations and bequests to support this vital work.

Mackenzie Institute for Early Diagnosis
In September 1919 Sir James Mackenzie set up the first Institute for Clinical Research on the Scores in St Andrews. His vision was to examine and record symptoms and signs of common disease in his patients and use that research to enable early diagnosis in general practice.

The School of Medicine launched the Mackenzie Institute for Early Diagnosis in 2019 to harness its existing medical research expertise to address today’s specific health challenges and – in doing so – to realise Sir James Mackenzie’s vision.

Professor Frank Sullivan (Interim Director) and a strong interdisciplinary team in St Andrews are delivering this vision through research programmes that focus on improving earlier diagnosis of cancer, cardiovascular disease, mental health and infection. Fellowships and PhDs will form the engine that drives this research.

Thanks to a generous legacy from Owen Silver, we can now fund a clinical lectureship for research and education within the Institute that will bring early diagnosis one step closer.

How a legacy can benefit the University community

St Andrews is a wonderful place to live, work and study, and legacies have always played a significant role here – not only in enriching the life of the University, but also of the wider community. Here are some of the civic projects that your legacy could benefit.

The Byre
The Byre is working towards delivering a diverse and balanced programme of events that reach a broad range of diverse audiences. It maximises opportunities for the University to play a leading role in public engagement and research impact activity through the creation and presentation of high-quality arts experiences.

In addition, the Byre offers opportunities for learning, training and professional development including student placements, internships and modern apprenticeships.

It is currently developing some key projects to create greater connection between the University, the programme of events and the local community – including the St Andrews Film Festival, St Andrews Playwriting Award and an engagement project taking arts into schools and the local community.
The Wardlaw Museum
The University’s flagship museum – the Wardlaw Museum (formerly known as MUSA) – is named after the University’s founder and first Chancellor Bishop Henry Wardlaw.

The Museum has recently been completely reimagined: it is now 50% larger with new displays in four thematic galleries, a temporary exhibition space and a remodelled entrance area and shop. The space also provides an exciting venue at the heart of St Andrews’ cultural quarter, which comprises the Wardlaw Museum, Bell Pettigrew Museum, Byre and Laidlaw Music Centre.

Exhibitions will draw on the more than 600-year history of the University as well as the world-leading research being done at St Andrews.

Dr Catherine Eagleton, Director of Museums plans to “innovate and experiment and continuously push ourselves to surprise audiences.”

Special Collections
Manuscripts, archives and early printed books have been acquired by the University since its foundation. Our University Library’s Special Collections has custody of this unique cultural heritage, which is of local, national and international significance.

At St Andrews we are unusual in that we offer access to the oldest and most valuable materials in our Libraries. These range from manuscripts, print materials and photographs to maps and music. The oldest item in the collection is a Greek papyrus dating from the first century AD.

Special Collections is committed to working with academic staff to ensure that our materials are used to support research, learning and teaching at St Andrews. The collections are also used in a variety of ways by external visitors, who range from academic researchers to arts practitioners and school and community groups.

The Richardson Research Library at Martyrs Kirk – acquired from the Church of Scotland in 2012 – was preserved and recreated as a central Research Library and Special Collections Reading Room for use by academic staff, postgraduate research students and, upon request, by members of the public.
Laidlaw Music Centre
The Laidlaw Music Centre has been one of the triumphs of the 600th Anniversary Campaign. Thanks to a transformational donation from the Laidlaw Foundation and a significant bequest from the late Jean McPherson – in addition to the many donations from friends, parents and alumni – this wonderful building has now been completed.

Music-making spaces include a suite of ten practice rooms, three ensemble rehearsal rooms, a recording suite and a percussion room.

The crowning glory of the new Music Centre is the McPherson Recital Room, with its reverberation chamber and a fully automated flooring system – the only one of its kind in the world.

This ‘jewel of a building’ – as it has been described – will be used for music making by the University community, the local community and visiting professional musicians from all over the world for many years to come.

Sports Centre
The first links between sport and education can be traced back to the fifteenth century when students studying at Scotland’s first university played golf.

Today, sport continues to play a significant part in student life, and we have one of the highest participation rates of any university in the UK. The University’s commitment to making sport a central part of the student experience has resulted in an investment in both sporting infrastructure and highly qualified specialist staff.
How we recognise your legacy: Chancellor’s Circle

The Chancellor’s Circle was founded in 2011 to recognise and thank those generous alumni and friends who have chosen to remember the University of St Andrews in their will during their lifetime.

Since its launch, membership has grown every year and we enjoy meeting members at our annual Circle events. This gives us the opportunity to celebrate the remarkable group of people who have pledged a gift to secure the financial future of the University of St Andrews and who will help us consolidate our status as a world-class centre for teaching, learning and research.

All members of the Chancellor’s Circle receive regular donor communications and an invitation to these events.

Sports facilities

Following a major £14m redevelopment of the Sports Centre – which included a huge contribution from legacies and donations – the University now provides some of the best sports facilities in the country. But to remain competitive within the current landscape of University sport and to keep up with greater student demand we have ambitious plans to develop our facilities by adding new artificial pitches, a boathed and a much-needed swimming pool.
We hope to widen the impact of our message, increase membership of the Chancellor’s Circle and introduce members and interested donors and friends to some of the wonderful projects that planned giving can help the University to realise.

“For those of you who are contemplating the decision to leave a gift to St Andrews, I hope you will feel inspired to help reinforce our position as one of the leading universities in the world by joining our Chancellor’s Circle.”

The Rt Hon Lord Campbell of Pittenweem CH CBE QC
President, the Chancellor’s Circle
I wish to help St Andrews continue its tradition of excellence

Returning this Legacy Pledge Form to us does not commit you in any way. It helps us to know your intentions and provides us with the opportunity to show our gratitude for your support during your lifetime.

Name: ................................................

Address: ................................................

........................................................................

Postcode: ......................  Telephone:....................

Email:  .......................  Date: D D M M Y Y

Please tick as applicable:

☐ I have already included a gift to the University in my will

☐ I am considering adding a gift to the University in my will

The following information helps us plan for the future and ensure that your wishes can be fulfilled.

I am planning to leave the University:

☐ the residue of my estate (or a portion thereof)

☐ a specific sum of money

☐ a specific asset (please specify) ..........................

An estimate of the current value of my proposed legacy is:

........................................................................

Please tick if you wish your legacy to remain anonymous:  ☐

I wish my legacy to support:

☐ Whatever is of priority to the University at the time of my death

☐ A specific project – please indicate below:

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