

# Ways of giving to the University of Exeter

## Maximise your giving

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You can use Gift Aid to boost the value of your donation by as much as 25p for every £1 that you give. Gift Aid allows us to recover the basic rate income tax paid on any gift. You can do this so long as you are a UK taxpayer and you sign the Gift Aid Declaration overleaf.

If you are a higher rate tax payer, you can reclaim the difference between the higher rate of tax 40 and/or 50 per cent and the basic rate of tax at 20 per cent on the total 'gross' value of your donation. For example, if you donate £100 we can reclaim £25 and you reclaim £25 if you pay tax at 40 per cent, making your £100 gift worth a total of £125 to us and only costing you £75. Or if you pay tax at 50 per cent we reclaim £25 and you can reclaim £37.50, making the total value of your £100 gift £125 to us and only costing you £62.50. Your self assessment form will also give you the option of giving your rebate to us.

### Regular Giving

You can choose to make a regular gift by Direct Debit. You can make your gift monthly, quarterly or annually. Please note that we are only able to collect Direct Debit gifts on the 1st day of the month. You can instruct your bank to stop the payments at any time. You are protected by the Direct Debit Guarantee, which appears at the bottom of the form and we recommend you keep it for your own reference. Banks and Building Societies may not accept Direct Debit instructions for some types of accounts (eg, CAF).

### Single Gifts

If you would like to make a single gift please send a cheque made payable to The University of Exeter. We also accept credit and debit card donations via Mastercard, Visa or Maestro, and donations made via the Charities Aid Foundation (CAF) or other intermediary charities. You can also give online at [www.exeter.ac.uk/exceptional/donate](http://www.exeter.ac.uk/exceptional/donate)

### Payroll Giving

Through Payroll Giving, you can provide a regular, reliable income stream that allows us to budget, while benefitting you with generous tax relief. Every £10 you give will only cost you £8, because you save £2 at the basic tax rate. Higher rate taxpayers will only pay £6. All you need to do is ask your payroll department to deduct regular charitable donations from your salary by filling in a simple application form, stating how much you would like to give. To obtain more information about payroll giving visit [www.cafonline.org](http://www.cafonline.org)

### Employers' Matching Gift Schemes

Many employers run matching gift schemes. A simple form (usually available from your personnel or finance department) must be completed. Your employer will then send a gift to match the amount you give.

### Gifts of Shares and Securities

You can also give a donation in the form of quoted shares. This method gives donors a double tax benefit. Individuals can set the full value of their gift against their liability for income tax in the tax year that the gift is made. This is in addition to exemption from capital gains tax on the disposal of the shares. A similar provision now applies to companies in respect of corporation tax. More information is available from the website of HM Revenue and Customs at [www.hmrc.gov.uk](http://www.hmrc.gov.uk) Alternatively, you can request further advice from us on the donation form overleaf.

### Legacies (Remembering Exeter in your Will)

By remembering the University of Exeter in your Will, you are providing lasting support for the University. All legacies to the University are exempt from inheritance tax. It may be that you have a specific department or area of research in mind. The University of Exeter can work with you to ensure that your wish is fulfilled. For further help and information on leaving a legacy please request our Goodwill Guide or visit [www.exeter.ac.uk/legacy](http://www.exeter.ac.uk/legacy) You can also call us on +44 (0)1392 722235.

### Gifts from the USA

Donors residing in the US can make their donation tax effectively by giving to the University of Exeter US Foundation. The University of Exeter US Foundation is a public tax-exempt charitable body organised under the provisions of section 501(c)(3) of the US Code. The Foundation was established to help link former students who now live and work in America as well as providing support to the University. The US Foundation can receive donations via cheque, credit card, PayPal and bank transfer.

To donate online visit [www.exeterusa.org/online-donation-form](http://www.exeterusa.org/online-donation-form)

### Gifts from Europe

You can make tax effective gifts from a number of European countries for further information please visit [www.transnationalgiving.eu](http://www.transnationalgiving.eu)

### Gifts from Canada

Please make your donation by either credit card or cheque as described above. On receipt of your gift we will send you the appropriate receipt required under Canadian Law. This will allow you to offset your gift against taxable income in Canada.

### Gifts from Hong Kong

The University of Exeter is registered with the Hong Kong Foundation for Charities (HKFC). The HKFC allows donors who reside in Hong Kong to make donations to organisations outside of Hong Kong in a tax-efficient manner, as they are able to issue gift receipts for Hong Kong tax purposes. Hong Kong tax payers should make their donations via the University of Exeter Hong Kong Foundation for Charities' website.

## How to return your completed form:

**By post (UK):** Freepost Plus RRUS-RHLX-XALX, Global Advancement, University of Exeter, Northcote House, The Queen's Drive, Exeter EX4 4QJ

**By post (overseas – stamp required):** Global Advancement, University of Exeter, Northcote House, The Queen's Drive, Exeter EX4 4QJ, United Kingdom

Alternatively, to update your details online go to [www.exeter.ac.uk/updateyourdetails](http://www.exeter.ac.uk/updateyourdetails), or to make a donation go to [www.exeter.ac.uk/exceptional/donate](http://www.exeter.ac.uk/exceptional/donate)

If you have any questions about this form, or would like to talk to us about anything, please email us on [alumni@exeter.ac.uk](mailto:alumni@exeter.ac.uk) or call +44 (0)1392 723141

Full Name\*: \_\_\_\_\_ Email: \_\_\_\_\_ Telephone: \_\_\_\_\_  
 Address\*: \_\_\_\_\_ Postcode\*: \_\_\_\_\_ Year of Graduation (if applicable): \_\_\_\_\_  
 \* To reclaim gift aid on your donation, we need your full name and full address.

**I would like to make a donation to support the campaign:** I would like my gift to support the following (please tick)

Tomorrow's Leaders – The Annual Fund   
  Tomorrow's Leaders – The Scholars Fund   
  Environment and Sustainability   
  Health  
 Living Systems Institute   
  Society and Culture   
  Sporting Success   
 Other: \_\_\_\_\_  
 I wish my gift to remain anonymous   
  I would like this donation to be treated as a joint gift with: \_\_\_\_\_

**Regular gift:** I would like to make a regular gift of £ \_\_\_\_\_ per month/quarter/year (please delete as appropriate) until further notice starting on 01/\_\_\_\_/\_\_\_\_



**Instruction to your Bank or Building Society to pay by Direct Debit.**



Please fill in the whole form using a ball point pen and send it to: Freepost Plus RRUS-RHLX-XALX, Global Advancement, University of Exeter, Northcote House, The Queen's Drive, Exeter EX4 4QJ.

Name and full postal address of your Bank or Building Society: \_\_\_\_\_  
 To: The Manager Bank/building society: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 \_\_\_\_\_ Postcode: \_\_\_\_\_  
 Name(s) of account holder(s): \_\_\_\_\_  
 Bank/building society account number: \_\_\_\_\_  
 Branch Sort Code: \_\_\_\_\_

Service user number: 

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 Reference: \_\_\_\_\_  
**Instruction to your Bank or Building Society:** Please pay University of Exeter Direct Debits from the account detailed in this Instruction subject to the safeguards assured by the Direct Debit Guarantee. I understand that this Instruction may remain with University of Exeter and, if so, details will be passed electronically to my Bank or Building Society.  
 Signature(s): \_\_\_\_\_ Date: \_\_\_\_\_  
 Banks and building societies may not accept Direct Debit Instructions for some types of account.

**Single gift**

I would like to make a single gift to the University of Exeter of £ \_\_\_\_\_  
 I enclose a cheque/voucher payable to the University of Exeter  
 Please debit my Visa / MasterCard / CAF Charity Card / Maestro  
 Signature: \_\_\_\_\_

Card No.: \_\_\_\_\_  
 Start Date: \_\_\_\_/\_\_\_\_ Expiry Date: \_\_\_\_/\_\_\_\_ Issue No. (if applicable): \_\_\_\_\_  
 Security No. (last 3 digits of number on signature strip): \_\_\_\_\_  
 Date: \_\_\_\_\_

**Gift Aid declaration – boost your donation by 25p for every £1 you donate**

I want to Gift Aid my donation and any donations I make in the future or have made in the past four years to the University of Exeter. I am a UK taxpayer and understand that if I pay less Income Tax and/or Capital Gains Tax in the current year than the amount of Gift Aid claimed on all my donations it is my responsibility to pay any difference.  
 Please notify us if you: Wish to cancel this declaration/Change your name or home address/No longer pay sufficient tax on your Income and/or Capital Gains.  
 Signature: \_\_\_\_\_ Date: \_\_\_\_\_

The University of Exeter is an exempt charity (reference X9538)

**I am interested in leaving a gift to Exeter in my Will:** (please tick)

Please send me more information   
  I am intending to leave a gift to Exeter in my Will   
  I have already made provisions for Exeter in my Will

**Volunteering:** I am interested in volunteering for the University (eg, mentoring a student, giving a careers talk, submitting a career profile) (please tick)

**Contact preferences:** The University of Exeter is committed to protecting your personal data and working with all relevant data protection legislation. Your data is used for alumni and supporter engagement activities, including fundraising. For more details, please see our full data protection statement at: [www.exeter.ac.uk/alumniidp](http://www.exeter.ac.uk/alumniidp). To keep our costs down and to reduce environmental impact most of our communications are sent by email. We would like to contact you by email, telephone and/or post. Please confirm your communication preferences by ticking the boxes below. If you have previously provided your contact details and consented to receive contact from us, we will continue to use your historic preferences until you tell us otherwise. I would like to be contacted by: (please tick yes or no in each instance)

Email  Yes  No    Telephone  Yes  No    Post  Yes  No    SMS  Yes  No

If you would like to change your preferences in the future, please contact us at [alumni@exeter.ac.uk](mailto:alumni@exeter.ac.uk) or on 01392 723141.

**The Direct Debit Guarantee:** This Guarantee should be detached and retained by the payer



- This Guarantee is offered by all banks and building societies that accept instructions to pay Direct Debits
- If there are any changes to the amount, date or frequency of your Direct Debit University of Exeter will notify you 10 working days in advance of your account being debited or as otherwise agreed. If you request University of Exeter to collect a payment, confirmation of the amount and date will be given to you at the time of the request
- If an error is made in the payment of your Direct Debit, by University of Exeter or your bank or building society, you are entitled to a full and immediate refund of the amount paid from your bank or building society – if you receive a refund you are not entitled to, you must pay it back when University of Exeter asks you to
- You can cancel a Direct Debit at any time by simply contacting your bank or building society. Written confirmation may be required. Please also notify us.