



THE UNIVERSITY OF  
**SYDNEY**

## Your lasting legacy Bequests at the University of Sydney



At the University of Sydney we understand that leaving a bequest is a carefully considered decision. It is your opportunity to support a cause you believe in and to create a legacy that will honour you, your family or someone you hold dear.

There are many areas to which you may direct your gift and many ways you can support the University. You can choose to support talented students by establishing a scholarship; help advance leading research and education to solve real-world problems; provide opportunities for Aboriginal and Torres Strait Islander students to succeed at university; or preserve and improve our building facilities to create first-class teaching and research centres.

# Supporting students

We believe that financial constraints should not exclude an outstanding student from tertiary education.

Donors who establish scholarships relieve the financial burden of study. They enable talented students from diverse backgrounds, including those at a social or economic disadvantage, to pursue and fully focus on their studies.

Scholarships can provide students or early career researchers with a global perspective through international travel fellowships. They can identify and support emerging talent at an undergraduate level and provide opportunities for the brightest minds to continue with postgraduate study.

## What is a scholarship?

A scholarship is a cash payment. It is awarded after an application and selection process, usually on the basis of academic merit, and may include equity and other considerations, such as:

- financial and/or social disadvantage that may otherwise prevent a student from attending university
- rural or regional background
- medical disadvantage
- demonstrated capabilities such as leadership and creativity.

## Endowed scholarships

An endowed scholarship is offered in perpetuity, helping generations of future students. Creating an endowed scholarship requires a minimum donation of \$135,000 for an undergraduate scholarship (value as at 2016) and \$557,000 for a postgraduate scholarship (value at 2016). The donation is tax deductible if made during the donor's lifetime.

Each donation or bequest for the establishment of an endowed scholarship is invested by the University's Investment and Capital Management team in a capital preserved trust. At least 4.5 percent of the scholarship fund is distributed towards scholarship payments each year, while the remaining capital and interest are preserved in the trust.

## Non-endowed scholarships

A non-endowed scholarship is given over a finite period of time with the whole donation or bequest spent on the scholarship. Gifts of less than \$135,000 that are intended to support student scholarships are treated as non-endowed scholarships.

## Undergraduate scholarships

An entry-level scholarship has a current value of \$6000 per year. This helps with the purchase of study materials such as computers, software, textbooks and course-related equipment, as well as living costs.

A scholarship of \$10,000 or more per year would help cover more substantial expenses such as accommodation and food as well as the cost of studying.

## Postgraduate students

A scholarship of \$10,000 per year would top up the income of a student who already holds an Australian Postgraduate Award (APA).

A scholarship of \$25,000 per year would enable us to establish a full scholarship for a research student, paying for living expenses as well as course fees.

A capital sum of \$557,000 (as at 2016) would support a postgraduate scholarship in perpetuity.

## Creating a scholarship before your bequest is available

You may like to create an endowed scholarship fund before your bequest becomes available through either of the following options:

1. A donation of \$135,000 (as at 2016) would enable us to establish an endowed scholarship immediately.
2. If you would like to give a smaller gift of \$10,000 a year to the University, our team will work with you to develop the form your new scholarship will take. However, it would not be awarded until the full amount of \$135,000 is reached or until your bequest becomes available and is included in the fund.

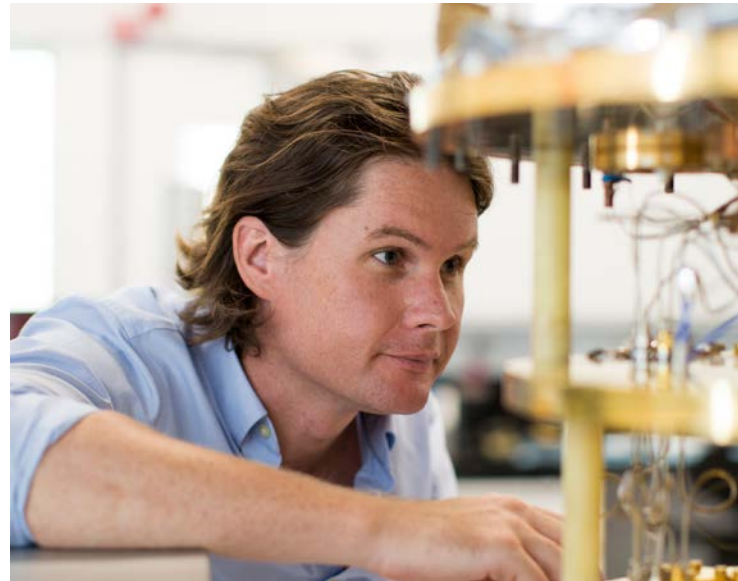
## Involve family and friends

Once an endowed scholarship has been created, other donors are welcome to add to the fund to increase its value or the number of scholarships available.

Scholarships can be named after the donor, after a family member, or in honour of another person. For example, an individual's family, friends or colleagues may wish to create a memorial scholarship in his/her honour.

# Research and teaching: solving real-world problems

We are inspired by the incredible potential of our researchers who make vital contributions to solving some of the world's most critical issues.



The University of Sydney has a long history of nurturing research and innovation. Our research spans all areas of human endeavour and we encourage our researchers to explore new frontiers of knowledge in areas of national and global importance. We unite the expertise of bright minds to find unique solutions that improve and transform lives.

Through donor generosity, we can turn research into results. By creating a chair at the University of Sydney or funding a research program, you would be supporting research and education that has a lasting impact on future generations.

## Research areas

Whatever your passion, it is highly likely the University of Sydney will have researchers working in the area. Our innovative cancer research has led to world-leading advances in cancer prevention. Thanks to these breakthroughs, people with cancer are living longer, and with a better quality of life.

Our researchers are also tackling a wide array of scientific, technological and environmental issues, from a revolutionary hip-joint prosthesis to sustainable solutions to the energy crisis.

New research in diabetes aims to dramatically decrease the incidence of all types of diabetes. Our researchers have also discovered that infrared light can reinvigorate brain cells and may stave off Parkinson's disease.

Increasingly, our research takes a multidisciplinary approach by bringing together the best people and infrastructure to conduct innovative research. Through the collaboration of our physics, chemistry, engineering and medical sciences researchers, new discoveries in nanoscale science and technology are emerging with the potential to change the world.

Research such as this is made possible thanks to far-sighted donors who share our vision for finding solutions to real-life problems.

## Create a chair

Supporting the cost of an academic chair offers a powerful way to foster the University's research and teaching well into the future. This is a way to support advancements in an area that you believe in and to leave a lasting legacy.

By funding the establishment of a chair, you will allow us to recruit professors who can conduct advanced research into the most critical issues. You will also support the leadership role they take in their discipline and the impact they have in the community.

## Capital requirement

The minimum donation to endow and maintain a chair ranges from \$4.5 million to \$5 million, depending on which faculty you choose to support.

## Foster research

Bequests enable us to undertake critical research.

For example, in 2011, the late Nancy Roma Paech left a bequest of more than \$8.6 million to the University to advance research into sustainable agricultural science.

Income from the bequest has established a new academic chair in Range Science, focusing on the sustainability of inland Australian landscapes used for animal production. The bequest also funds a number of visiting professorships, PhD and master's scholarships, all named in honour of Nancy Roma Paech.

# Increasing Aboriginal and Torres Strait Islander participation

We believe in Aboriginal and Torres Strait Islander participation at every level of our study, work and research.

We are committed to working in partnership with Indigenous communities to increase engagement, tackle inequities, and connect with our country's past, present and future.

This perspective is integrated into everything we do, and encapsulated in our Wingara Mura – Bunga Barrabugu ('Thinking path to make tomorrow') strategy, which outlines our determination to make a real difference in Aboriginal and Torres Strait Islander education, research and engagement across the University. It informs how we work as a community to listen to, enrich and retell stories in a way that respects and empowers Aboriginal and Torres Strait Islander cultures and perspectives as a part of our vibrant identity.

## How your bequest can help

Many Aboriginal and Torres Strait Islander students need to relocate to attend the University of Sydney, so living costs can prove a barrier.

Aboriginal or Torres Strait Islander students may be the first in their family to enter tertiary study, and their families are unable to provide financial support.

Every year the University of Sydney offers a number of places to deserving Aboriginal and Torres Strait Islander students. Sadly, not all offers are accepted, largely due to the daunting cost of accommodation in Sydney.

Your support will help ensure more Aboriginal and Torres Strait Islander people receive every opportunity to succeed at university.

## Indigenous accommodation scholarships

These scholarships encourage talented Aboriginal and Torres Strait Islander students to come to the University of Sydney. They include funding for living on campus or in university accommodation, liberating students from financial pressures and allowing them to reach their full potential.

Accommodation scholarships are valued from \$12,000 to \$25,000 per annum, reducing the cost of accommodation or covering it entirely. These may be gifted as a fixed-term scholarship or an endowed scholarship. An endowed accommodation scholarship of \$268,000 would allow a student to receive \$12,000 per annum.

## Wingara Mura – Bunga Barrabugu summer program

This unique program brings Aboriginal and Torres Strait Islander high school students from Australia's far reaches to experience the University of Sydney. We pay for travel, meals, accommodation and all other expenses associated with attendance.

The summer program is a chance for these students to stay on campus, take part in lectures, tutorials and presentations, try out different subject areas, learn about industries, pathways to higher education and the kinds of financial and academic assistance available once they reach university.

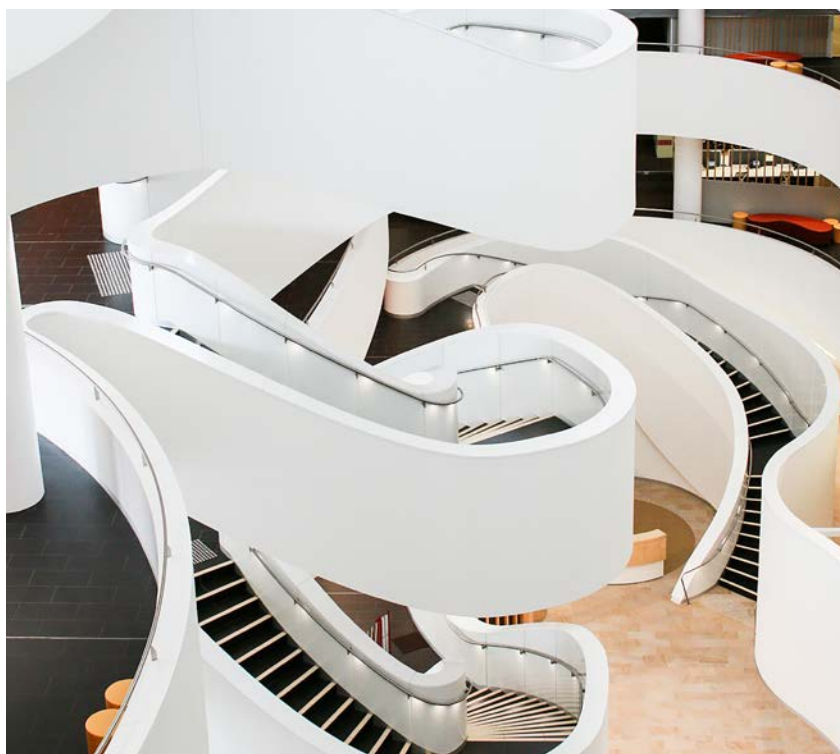
Most importantly, attendees meet current students and staff and learn what university life is all about.

A donation of \$50,000 would greatly enhance the University of Sydney's outreach programs such as the Wingara Mura – Bunga Barrabugu summer program. A gift of \$5 million would endow our outreach programs for the future, ensuring thousands of Aboriginal and Torres Strait Islander students will benefit for generations to come.

Scholarship values are correct as at 2016.



## Building our future



Our physical infrastructure is as important as our intellectual frameworks. It is imperative that we create spaces in which people and their ideas can flourish. Our benefactors help us preserve and improve our buildings and facilities to create first-class teaching and research centres.

The University of Sydney is home to some of the city's most iconic architecture that delights and inspires students, staff, and visitors.

### **Support our infrastructure**

Gifts to our campus environment will support our vision for the future: to create a campus that meets the recreational, cultural, research and educational needs of those who work and study here, and for those who live in the surrounding community.

Investing in infrastructure today enables us to deliver excellence in teaching and research far into the future. For example, a bequest from the estate of the late Thomas Fisher in 1885 (£32,000 – the equivalent of more than \$2.5 million today), assisted in the establishment of and continues to maintain Fisher Library, which today is the largest academic library in the southern hemisphere. Fisher Library is home to a print collection of more than 5.1 million items and hosts more than 1.3 million visitors each year.

# A message from the Vice-Chancellor

Bequests play an important role in keeping us at the forefront of life-changing research. They ensure we attract and support the most talented students and enable us to carry out research and teaching in the best facilities possible.



Dr Michael Spence, Vice Chancellor (BA LLB Sydney)

In 1880, John Henry Challis gave the University its first major gift, a bequest of £276,000 (equivalent to more than \$40 million today). The Challis bequest was used to establish professorial chairs in anatomy, zoology, engineering, history, law, philosophy and modern literature, allowing our researchers to make new discoveries in these fields.

More recently, in 2013 Elwin à Beckett left the bulk of her estate to the University to advance research into bowel cancer. The gift, valued at more than \$15 million, was made in honour of her much-loved brother Martin, who died from the disease in 1986.

By making a bequest to the University, no matter how small or large, you too can make an enduring contribution to the advancement of learning and discovery among our staff and students – those who work and study here today, and those who will work and study here 100 years from now.

Your gift will also honour you, your family or someone close to you for generations to come – the greatest inheritance possible.

“One of the greatest contributions you can leave for future generations is knowledge.”

**Dr Michael Spence**  
Vice-Chancellor and Principal



A will is a very personal statement and as each individual's circumstances vary, we strongly recommend that you consult to your legal adviser before drafting a new will or updating an existing one.

The following bequest wording is suggested to indicate your intention to make a general bequest to the University.

Should you require assistance with more specific endowment language, please contact the Planned Giving office.

### General purposes

"I give [% of my residuary estate / insert dollar amount\*] to The University of Sydney ABN 15 211 513 464 ("University") of the University of Sydney, NSW 2006, for the general purposes of the University."

### Specific purpose - research

"I give [% of my residuary estate / insert dollar amount\*] to The University of Sydney ABN 15 211 513 464 ("University") of the University of Sydney, NSW 2006 for research in the field of [insert general description of area of research, eg, cancer, electrical engineering]."

### Specific purpose - scholarships/ bursaries

"I give [% of my residuary estate / insert dollar amount\*] to The University of Sydney ABN 15 211 513 464 ("University") of the University of Sydney, NSW 2006 to establish one or more scholarships and/or bursaries for [insert general description of area to be supported if required, eg, medicine, Australian history, music]. [Each scholarship/bursary is to be called [insert name of scholarship/bursary] in the area for which it is awarded.]"

### Faculty or academic college

(for example, Sydney Conservatorium of Music)

"I give [% of my residuary estate / insert dollar amount\*] to The University of Sydney ABN 15 211 513 464 of the University of Sydney, NSW 2006 ("University") for the general purposes of the [specify faculty or academic college] or its successor.

### \* Inflation clause

If the bequest to the University specified in a will is a fixed dollar amount, please also consider inserting an inflation clause. Suggested wording is: "The bequest amount of \$..... is to be adjusted for inflation by applying the following formula:  $A = \$..... \times B/C$  where:

- **A** represents the adjusted amount payable to the University;
- **B** represents the Consumer Price Index All Groups, Weighted Average of Eight Capital Cities ("CPI") figure published quarterly by the Australian Bureau of Statistics as last published before the date of my death; and
- **C** represents the CPI figure last published before the date of this my will.

If at the time of my death the CPI is no longer calculated and published on a quarterly basis, then I direct my executor(s) to adjust the amount of \$..... for inflation using such other statistical measure as is chosen by my executor(s) in their absolute discretion."



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# A tradition of philanthropy

## Challis Bequest Society

Bequests have played a critical role in the evolution of the University of Sydney.

On his death in 1880, philanthropist John Henry Challis left the University an estate worth more than \$40 million in today's currency. The gift transformed learning, teaching and research across the University in fields ranging from medical and science to law, literature and engineering.

Today, bequests are just as vital to the University of Sydney. They support breakthroughs in medicine, educate future generations of students and solve real-world problems.

We also gratefully receive bequests of rare scientific and cultural artefacts.

Whatever form they take, bequests to the University of Sydney continue to have an important impact on learning and discovery that reaches far into the future.

### The Challis Bequest Society

The University deeply appreciates the commitment of our alumni and friends who have named the University of Sydney as a beneficiary in their will.

The Challis Bequest Society, launched with the generous support of an anonymous donor, recognises the important place our benefactors have within the University family.

Named in honour of John Henry Challis, whose bequest was the first for the University and which funded seven professorships across various disciplines, the Challis Bequest Society welcomes our supporters who have chosen to leave a bequest to the University of Sydney.

In acknowledgment of their commitment to the University, members of the Challis Bequest Society receive a special membership package. They are also granted access to a range of additional benefits – from exclusive member events and behind-the-scenes tours to regular updates on our latest milestones and discoveries.

We hope you will join us and other benefactors who share a passion for supporting knowledge at the University of Sydney.



John Henry Challis

“We make a living by what we get; we make a life by what we give.”

Sir Winston Churchill



The royal window, donated by John Henry Challis in 1859, displays the young Queen Victoria who granted the Arms of the University in 1857.

### Contact us

If you would like more information on bequests, please contact:

Planned Giving  
Level 7, Jane Foss Russell Building  
The University of Sydney NSW 2006  
– [sydney.edu.au/bequest](http://sydney.edu.au/bequest)

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