CAF AMERICAN DONOR FUND

Donor Advised Gift Request form

If you have any questions when completing this Gift Request form, please contact a member of our Private Client team on 03000 123 150.

Please complete this Gift Request form in BLOCK CAPITALS.

Please attach a certified copy of your passport or other photo ID for our records.

If you have lived at your home address for less than three years, please supply your previous address details for the last three years on a separate sheet and attach it to this Gift Request form.

In order to comply with UK anti-money-laundering regulations, we are required to complete checks on individuals before your Gift Request can be accepted. Wherever possible these checks are performed electronically. In certain circumstances, however, it may be necessary to request additional documentation to satisfy our requirements under the relevant regulations.

Please use this Gift Request form to make a charitable gift. Before you complete this Gift Request form and submit it to CAF American Donor Fund (CADF), please ensure you have read and ticked each of the items noted in the Declaration at Section 7 and have considered the Donor Advised Gift Fee Schedule which sets out the applicable fees to your Gift Request.

Please note that you can only use this CADF Donor Advised Gift service to give to a Charitable Purpose. All assets donated by you to CADF constitute an irrevocable and outright gift by you to CADF of all rights, title and interest in such assets. Once your donation is made to CADF, it can not be returned to you. Gift Requests are purely advisory and are not binding on CADF.

Section 1
Name of Donor

☐ Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other
Full forename(s)______________________________________________________
Surname______________________________________________________________
☐ I have made a gift by way of CADF Donor Advised Gift service in the last three years.

Section 2
Donor details

Only complete this section if you are a new CADF donor or would like to update your details.

My Personal details are as follows:
☐ Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other
Full forename(s)______________________________________________________
Surname______________________________________________________________
Home address_____________________________________________________________________________________
Country        Postcode/Zipcode
Date of birth dd mm yyyy
Home telephone number __________________________________________
Work number _______________________________________Mobile number ______________________________________
Email address_____________________________________________________________________________________
Nationality_____________________________________________________________________________________
Gender ☐ Male ☐ Female
Where you wish to donate stocks or shares, you will also need to complete and submit with this Gift Request form a Deed of Gift which is available on request from the Private Client team. All stocks and shares must be sold promptly.

Country of residence
List all jurisdictions in which you are considered to be resident for tax purposes.

- United Kingdom  Non-domiciled  Yes  No
- United States
- Other (Please specify)

Occupation(s) (please list all)

Correspondence address (if different from above)

Country
Postcode/Zipcode

Address for UK tax purposes (if different from above)

Country
Postcode/Zipcode

Address for USA tax purposes (if different from above)

Country
Postcode/Zipcode

Section 3
Gifted Assets

I wish to give the following:

- Bank/wire transfer to CAF American Donor Fund for £/$/€
- Enclosed cheque (check) made payable to CAF American Donor Fund for £/$/€
- Publicly quoted stocks or shares – please provide the exchange and quotation reference
  - Exchange
  - Quotation Ref

Please confirm how you hold your stocks or shares:

- Share certificate  - Nominee account  - Held with stockbroker

Further details:
Section 4

Giving Request

I wish to give my Gifted Asset(s) noted in Section 3, together with any Gift Aid claimed (if applicable) less any fees to:

[ ] CADF’s General Fund
[ ] The charity named below:

Name of charity

Contact name at charity

Address of charity

Country: ___________________________ Postcode/Zipcode: ___________________________

Charity Commission number: (if known) ___________________________
Alternative organisation number: (if known) ___________________________

Where a charity has a number of fundraising campaigns and you wish your Gifted Asset(s) to be used for a specific fundraising campaign or purpose, please specify below:

In whose name shall we make the payment to the charity?

[ ] As above
[ ] Anonymous
[ ] Other (Please specify) ___________________________

Name of second charity (if required)

Amount to donate to second charity

£/$/€ ___________________________

Contact name at charity

Address of charity

Country: ___________________________ Postcode/Zipcode: ___________________________

Charity Commission number: (if known) ___________________________
Alternative organisation number: (if known) ___________________________

Where you elect to claim Gift Aid by signing a Gift Aid declaration, your chosen charity will receive an additional 25p for every £1 (or equivalent) you have donated less any fees.

Where you name a second charity an additional fee detailed in the Fee Schedule is payable.
Where a charity has a number of fundraising campaigns and you wish your Gifted Asset(s) to be used for a specific fundraising campaign, please specify below:

In whose name shall we make the payment to the charity?

☐ As above
☐ Anonymous
☐ Other (Please specify)

Full name

Section 5

Fees

The fees and charges set out in the Donor Advised Gift Fee Schedule (the “Fees”) will be deducted from your Gifted Asset(s) set out in Section 3.

Section 6

Data Protection

Keeping in touch with the Original Donor

Please complete this section if this is your first CADF Donor Advised Gift Request form or if you would like to change your Data Protection election(s).

Communications

We offer all our Donors invitations to regular events to inform and educate on topics related to philanthropy. We may also send out newsletters to share news and knowledge of the sector. If you do not wish to receive these details, please tick here.

Other CAF products and services

We would like to tell you by letter, phone or email about additional products and benefits from the CAF Group that we believe will be of interest to you. If you would prefer not to be contacted, please tick below. Please note that ticking the box means that we will not be able to tell you about these additional benefits.

The CAF Group will not share your information with any outside organisation except as part of providing a product/service or when legally obliged to do so.

I do not wish to receive details of other products and services from the CAF Group.

Alternatively, please write giving your details and instructions to:

Data Protection Officer, Charities Aid Foundation, Kings Hill, West Malling, Kent ME19 4TA.

Please note you may receive acknowledgement or other information from the charity you have chosen to support unless you have ticked the Anonymous box in Section 4.
Section 7

Declaration

By signing this Gift Request form, I confirm that:

☐ I understand that this completed Gift Request form by me to CADF constitutes an offer by me to transfer the Gifted Asset(s) set out in Section 3 are subject to the terms set out in this Gift Request form.

☐ I understand that this Gift Request form will only be deemed accepted by CADF when CADF issues a confirmation of the gift being paid.

☐ I understand that the Gifted Asset(s) can only be used for Charitable Purposes.

☐ I shall provide CADF with such access to such documentation and information in respect of the Gifted Asset(s) to which this Gift Request form relates as CADF may reasonably require on reasonable notice, including but not limited to proof of ownership, documents of authenticity and, where CADF has agreed for the Donor to sell the Gifted Asset(s) on CADF’s behalf, proof of sale.

☐ Once the Gifted Asset(s) has/have been accepted in whole or in part, and legally and/or beneficially, by CADF, it cannot be returned to the Donor and, the Donor shall have no further right to or interest in the benefical value of the Gifted Asset(s) (or any return or income accruing thereto).

☐ Where any income or return, or similar, accruing to the Gifted Asset(s) is/are received by the Donor or any representative of the Donor after the date on which CADF has accepted the Gifted Asset(s), the Donor shall hold, or shall ensure that its representative holds, such income or return, or similar, on trust for CADF and to CADF’s order and shall ensure that any such income or return, or similar is transferred to CADF within 14 (fourteen) days of receipt.

☐ Where my Gifted Asset(s) comprise(s) of stocks or shares, I have enclosed with this Gift Request form, my completed Deed of Gift.

☐ I confirm that I have not, and will ensure that I do not, personally benefit in any way either directly or indirectly from the giving of the Gifted Asset(s). I further understand that the Gifted Asset(s) cannot be provided in return for membership subscriptions or for payment of goods or services.

☐ I confirm that the information given in this Gift Request form is true, accurate and not misleading.

Full name


Donor/Authorised Signatory Date dd/mm/yyyy

Next steps

Please forward the completed Gift Request form(s) to:

CAF American Donor Fund, Private Clients, 25 Kings Hill Avenue, Kings Hill, West Malling, Kent, ME19 4TA
Issued by Southampton Row Trust Limited registered in England and Wales under number 3900842 and having its registered office at 25 Kings Hill Avenue, Kings Hill, West Malling, Kent, ME19 4TA; registered with the Charity Commission under number 1079020 (trading as the CAF American Donor Fund (CADF)).

CADF is a member of the Charities Aid Foundation (registered charity number 268369) family of organisations.

CAF American Donor Fund, 25 Kings Hill Avenue, Kings Hill, West Malling, Kent, ME19 4TA

T: +44 (0)3000 123 150
W: www.cafonline.org/cadf
E: cadf@cafonline.org

Registered charity number 1079020