

CAF CHARITABLE LEGACY SERVICE

LETTER OF WISHES

Please complete this form to tell us how you would like the legacy that you have gifted to CAF to be distributed. It is important that you read the guide to the CAF Charitable Legacy Service before filling in this form, which explains in detail how the service works.

YOUR CONTACT DETAILS

Title ☐ Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other (please specify)

Full forename(s)

Surname

Address

Postcode

Date of birth dd/mm/yyyy

Email address

Phone number

Mobile number

DETAILS ABOUT YOUR WILL

Date of Will dd/mm/yyyy

Name of Will Drafter (eg, firm of solicitors)

Name(s) of executor(s)

If you have a question when completing this form please contact our Legacy Team on 03000 123 108 or email legacies@cafonline.org.

Telephone calls may be monitored or recorded for security/training purposes.

DETAILS ABOUT YOUR WILL

These details are optional but will assist us in matching this Letter of Wishes to your Will when we are contacted by your executor.

DATA PROTECTION AND PRIVACY

We take data protection and privacy very seriously. Our Privacy Notice at www.cafonline.org/privacy governs the way in which we collect, retain and use personal data. We shall ensure that we only hold personal data for as long as it is needed and that it is held securely.

YOUR WISHES

I would like Charities Aid Foundation (CAF) to distribute any legacy that I gift to CAF in my Will as follows:

1) To the following named organisation(s) in the specific proportions set out below:

Name of Charitable Organisation	Charity number	% of total legacy gifted to CAF	OR £ [fixed amount]

AND/OR

2) To CAF for use by CAF as part of the following of its activities:

To support CAF's charitable purpose and mission to make giving more effective worldwide.

% of total legacy gifted to CAF OR £ [fixed amount]

To be used by CAF for social investment purposes as part of its Venturesome Impact Fund
(please see www.cafonline.org/personal-giving/maximise-your-impact/social-investment)

% of total legacy gifted to CAF OR £ [fixed amount]

AND/OR

3) As the holder of CAF Account or CADF Fund number

I would like any undistributed balance on this account, at date of death, to be added to the legacy I have left to CAF, for distribution in the same manner.

AND/OR

4) Where I have either

- (a) not named any specific charities above, or
- (b) not distributed the total amount of my legacy to specific charities above, or
- (c) the specific charities above do not exist or cannot be readily identified at the time of my death,

I understand that CAF will distribute the remaining balance of funds comprising my legacy to the remaining charities specified in proportion to the amount of my total legacy to CAF that I have left to those remaining charities and, if there are no such remaining charities, CAF will be entitled to transfer the funds to our unrestricted funds to meet our charitable purposes.

ADDITIONAL INFORMATION

How did you hear about the CAF Charitable Legacy Service?

Please tick the box that most applies to you.

- ☐ Referral from solicitor
- ☐ Referral from Will-writer
- ☐ Referral from other professional advisor, please specify

- ☐ Referral from CAF client
- ☐ Self-sourced
- ☐ Conference or event, please specify

- ☐ CAF website
- ☐ Other website, please specify

DECLARATION

I understand that, if (one of) the named charity(ies) above ('the Original Charity') has amalgamated with another charity, CAF shall be entitled to distribute that part of the funds, which would otherwise have been paid to the Original Charity, to that other charity.

I further understand that, if two of the named charities above have merged with each other to form a single charity, CAF shall be entitled to distribute both parts of the funds, which would otherwise have been paid to each charity, to the one merged charity.

Where the proposed distribution equates to less than one pound per charity, or less than one pound to any particular charity, CAF shall be entitled to distribute to a smaller number of charities/ a single charity from those set above.

This Letter of Wishes overrides and supersedes any previous Letter of Wishes that I have signed in respect of my legacy to CAF. I understand and agree that CAF will make a charge for distributing the legacy in accordance with my Letter of Wishes as per the CAF Charitable Legacy Service Fee Schedule at the date of the distribution.

- ☐ I am happy for CAF to share this information with my family after my death
- ☐ I am happy for CAF to share this information with my executors after my death
- ☐ I am happy for CAF to share my name with the charities I have donated to after my death.

We will not share any information prior to your death.

Full name

By typing my name and date, and sending this document to CAF, I confirm that I agree to the above terms of this service and to be bound by them and that all information I have provided is correct.

Date dd mm yyyy

KEEPING YOU INFORMED

As well as contacting you about this product or service, we would like to send you information about other related products and services from the CAF Group that we believe will be of interest to you.

I DO NOT want to receive this information by (tick all that apply):

☐ Email ☐ Phone ☐ Post

Please note: if you tick a box, we will not be able to tell you about these products and services in this way.

For information about how CAF handles your information, see our Privacy Notice which you can find at www.cafonline.org/privacy

CAF and the companies in which it has a majority stake, or their subsidiaries (defined here as 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.

FOR MORE INFORMATION

T +44 (0)3000 123 028
E legacies@cafonline.org
W cafonline.org

Telephone lines are open Monday to Friday, 9am to 5pm (excluding UK bank holidays).

Registered charity number 268369