Show your employees that you respect and support the contributions they make to society by using the CAF Matched Giving Service to enhance their donations. The scheme allows you to ‘match’ fundraising activities including:

- CAF Give As You Earn® donations
- personal employee donations made by cheque, cash, Direct Debit or debit/credit card
- individual and team fundraising activities
- individual and team volunteering efforts

with tax-effective financial donations direct from your company’s community investment budget.

**Flexible and safe**

With CAF Matched Giving it is simple to set up and administer a matching scheme. You set the criteria and boundaries, and our system generates a list of requests for your approval before administering your donations directly. We also send you comprehensive reports so you can monitor and review activity and send individual statements to your employees and their chosen charities.

CAF will validate all recipients to ensure your matching donations are being used for charitable purposes, within the UK and overseas.

**A holistic approach**

If you would like to take a cohesive approach to your CSR strategy and community investment activity, CAF Matched Giving can be used in conjunction with a number of other CAF products and services, including:

- CAF Staff Charity Fund which will empower and unite your employees by allowing them to donate tax-effectively from their salary into a group account from which they can manage and make donations
- CAF Company Fundraising Account which allows you to encourage your employees and customers to raise cash for charity and manage donations simply and safely
- CAF Give As You Earn which gives your employees the freedom to set up regular tax effective donations to the charitable organisation of their choice directly from their salary.

To discuss how CAF can help you support and enhance your employees’ charitable activity further, please contact our Customer Services team on 03000 123 000 or companyaccounts@cafonline.org

**Data Protection and Privacy**

We take data protection and privacy very seriously. Our privacy policy at www.cafonline.org/privacy governs the way in which we collect, retain and use personal data. Our privacy policy also sets out what data we collect about you, why we collect it and your rights with regard to it. We aim to ensure that we only hold personal data for as long as it is needed, and that it is held securely.
CAF MATCHED GIVING

Service Schedule

Definitions

The definitions set out in the Definition Schedule to this Service Schedule apply to all references in this Service Schedule and throughout the CAF Matched Giving Application Form and the CAF Matched Giving Fee Schedule.

Service Schedule conditions

1 Nature of the CAF Matched Giving Service

1.1 The CAF Matched Giving Service set out in this Service Schedule is supplemental to the CAF Company Account and is, therefore, only available for Customers who successfully apply for a CAF Company Account in conjunction with their CAF Matched Giving Service application.

1.2 For the avoidance of doubt, assets donated by the Customer as part of the CAF Matched Giving Service will be subject to the terms and conditions set out in the CAF Company Account Service Schedule and the CAF Services for Companies Terms and Conditions in addition to those set out in this Service Schedule.

2 CAF's obligations

2.1 The CAF Matched Giving Service comprises the following services that CAF will provide to the Customer:

2.1.1 receiving applications in a format agreed by CAF and the Customer from Applicants and/or from proposed Beneficiaries;

2.1.2 where the Customer has also taken out the CAF Give As You Earn® Service and has elected to provide matching giving under the terms of this Service Schedule in respect of the CAF Give As You Earn® Service, processing of matching giving in accordance with the Matching Criteria in respect of Employees' contributions made pursuant to the CAF Give As You Earn® Service (as if each such Employee was an Applicant);

2.1.3 within two weeks of the end of each Matching Period, the provision of a report in a format determined by CAF which lists details of the applications, including Applicants and proposed Beneficiaries, and highlights those proposed Beneficiaries that CAF believes do not fulfil the Matching Criteria;

2.1.4 maintaining a list of proposed Beneficiaries and Applicants that the Customer has previously confirmed do not fulfil the Matching Criteria and ensuring these are excluded from receiving the Customer's distributions;

2.1.5 confirming to the Customer the total funds required in order for CAF to make distributions, once the Customer has approved reports provided by CAF and confirmed those Applicants and proposed Beneficiaries that do not fulfil the Matching Criteria;

2.1.6 once distributions have been made, statements to proposed Beneficiaries listing distributions with details of Applicants and reasons for rejecting applications (if applicable);

2.1.7 if requested by the Customer, once distributions have been made, providing statements to the relevant Applicant, listing the distributions sent to its Beneficiaries and notification of rejected applications (if any); and

2.1.8 if requested by the Customer, once distributions have been made, providing the Customer with reports in a format determined by CAF listing the distributions that have been made by Approved Applicants and Beneficiaries.

2.2 All reports containing Personal Data sent by CAF to the Customer will be sent by encrypted email. CAF will liaise with the Customer in advance of sending the first report to confirm the process for decrypting reports.

2.3 All applications will be processed by CAF in pounds sterling. If an application is presented to CAF in a different currency, CAF will convert the value of the application into pounds sterling using a currency conversion process agreed with the Customer.

2.4 CAF shall be under no obligation to provide the CAF Matched Giving Service, or any part of it, if the Customer is in breach of its obligations under this Contract.

3 CAF's authority to distribute

Where CAF receives a written instruction from an Authorised Contact to distribute funds according to the report approved and returned by the Customer to CAF, this shall be construed as a Giving Request in respect of the amount of the distribution for the purposes of this Contract.

4 Customer obligations and rights

4.1 The Customer shall fund, and keep the CAF Company Account in funds to the extent required to meet applications that fulfil the Matching Criteria (together with the amount of the applicable fees, costs, contributions and expenses as set out in the CAF Matched Giving Fee Schedule if the Customer has opted to pay these from the CAF Company Account). CAF accepts no responsibility for any delays caused by the Customer failing to promptly fund the CAF Company Account to the required extent.

4.2 The Customer shall respond promptly to requests from CAF for approval of reports sent to the Customer or for additional information in order that CAF may respond to enquiries from Applicants. CAF accepts no responsibility for any delays caused by the Customer failing to respond promptly to such requests.

4.3 The Customer shall clearly indicate on the reports, those Applicants and proposed Beneficiaries which do not fulfil the Matching Criteria.

4.4 CAF shall be entitled, and is hereby authorised by the Customer, to respond to enquiries made by Applicants, including the provision to them of information held by CAF in respect of their applications and any enquiries regarding the operation of this Service.
4.5 The Customer shall make Applicants aware that CAF may share with the Customer details of the applications it receives, including, but not limited to, the identity of the Applicants and the proposed Beneficiaries.

4.6 The Customer shall make Applicants aware that CAF may share with proposed Beneficiaries the identity of Applicants who have proposed them as a Beneficiary and relevant details of their applications, either by way of providing statements to proposed Beneficiaries or otherwise. The Customer should give Applicants the opportunity to indicate on their application to CAF if they do not wish CAF to pass on this information to proposed Beneficiaries.

4.7 The Customer agrees that, CAF may invoice the Customer or deduct from the nominated CAF Company Account all costs, fees, contributions and expenses that it incurs in connection with the operation and administration of the CAF Matched Giving Service. The Customer accepts that CAF will recover its costs by means of an invoice or a deduction from the nominated CAF Company Account of a sum equivalent to the costs, fees, contributions and expenses set out in the CAF Matched Giving Fee Schedule. Such sums are invoiced or deducted from the nominated CAF Company Account at the time of the relevant transaction or as otherwise set out in the CAF Matched Giving Fee Schedule.

4.8 The Customer agrees that CAF may also invoice the Customer or deduct from the nominated CAF Company Account the fees, costs, contributions or expenses associated with the provision of any additional features or additional services that the Customer may request from time to time at the rate or price then prevailing.

4.9 The Customer may submit a request to amend the Matched Giving Criteria by submitting a new CAF Matched Giving Application Form to CAF. On receipt of the CAF Matched Giving Application Form, CAF will contact the Customer to agree an appropriate implementation timeframe for the changes.

5 Data Protection

5.1 The Customer acknowledges that the information contained in the application is provided by the Applicants to CAF, is provided to CAF as Data Controller (as defined in the Data Protection Legislation) in respect of that information, and that where the Customer holds the application, or any updated information in respect of the application, they do so as agent for CAF and, therefore, Data Processor (as defined in the Data Protection Legislation).

5.2 Each of the Customer and CAF agree to each other to comply with the requirements of the Data Protection Legislation as Data Processor and Data Controller, respectively and to comply in all respects with the provisions relating to Data Protection as set out in more detail in the CAF Services for Companies Terms and Conditions.

Definition Schedule

Terms, words or phrases defined in the CAF Services for Companies Terms and Conditions and/or in the CAF Company Account Service Schedule shall have the same meaning when used in this Service Schedule unless defined below.

Applicant means a person who submits an application to CAF to be considered as part of the Customer's CAF Matched Giving Service.

Approved Applicant means a person of the kind selected as such by the Customer in the applicable Matching Criteria Schedule.

Beneficiary means an organisation of the kind selected as such by the Customer in the applicable Matching Criteria Schedule and those organisations which the Customer approves from time to time.

Contract means, in respect of the Services described in this Service Schedule, together: the CAF Services for Companies Terms and Conditions, the CAF Company Account Service Schedule, this Service Schedule, the Forms, the CAF Company Account Fee Schedule and the CAF Matched Giving Fee Schedule.

CAF Matched Giving Fee Schedule means the schedule made available by CAF from time to time in which the fees, costs, contributions or expenses applicable to the CAF Matched Giving Service are set out.

Forms means, in respect of the Services described in this Service Schedule, such of the CAF Matched Giving Application Form; the CAF Company Account Application Form; the Contacts Form; the Organisation Registration Form; the Matching Criteria Schedule, each submitted by the Customer, as the context may require, and/or any other form of application submitted by the Customer to CAF and accepted by CAF in order to take out the Services described in this Service Schedule.

Matching Criteria means the criteria set out in the Customer's Matching Criteria Schedule.

Matching Criteria Schedule means the most recent Matching Criteria Schedule received by CAF and signed and dated by an Authorised Contact for and on behalf of the Customer.

Matching Period means the period nominated by the Customer on the Matching Criteria Schedule during which applications are collated by CAF.
The following fees shall apply for the CAF Matched Giving Service.

<table>
<thead>
<tr>
<th>Fee</th>
<th>Charged</th>
</tr>
</thead>
<tbody>
<tr>
<td>One-off set up: £600 + VAT per day</td>
<td>Minimum of £600 + VAT*</td>
</tr>
<tr>
<td>Annual administration: £400 + VAT per day</td>
<td>Minimum of £1,600 + VAT*</td>
</tr>
<tr>
<td>UK payment transaction</td>
<td>£3.75 + VAT</td>
</tr>
<tr>
<td>Validation of UK organisation**</td>
<td>£25 + VAT</td>
</tr>
<tr>
<td>(not registered with Charity Commission)</td>
<td></td>
</tr>
<tr>
<td>Validation renewal of UK organisation**</td>
<td>£12.50 + VAT</td>
</tr>
<tr>
<td>(not registered with Charity Commission)</td>
<td></td>
</tr>
<tr>
<td>Overseas payment transaction</td>
<td>£10 + VAT</td>
</tr>
<tr>
<td>Validation of overseas organisation**</td>
<td>£50 + VAT</td>
</tr>
<tr>
<td>Validation renewal of overseas organisation**</td>
<td>£25 + VAT</td>
</tr>
<tr>
<td>Postage – donor statements</td>
<td>At cost</td>
</tr>
<tr>
<td>Bank charges</td>
<td>At cost</td>
</tr>
</tbody>
</table>

Fees will be invoiced or deducted from the nominated CAF Company Account, as indicated on the CAF Matched Giving Application Form.

* The one-off set up fee depends on the complexity of requirements and can be provided by CAF in writing to the Customer on request. CAF will confirm the applicable one-off set up fee in writing on receipt of the completed CAF Matched Giving Application Form from the Customer. The annual administration fee includes but is not limited to: authorisations of matching, maintaining records, report generation, correspondence, transferring funds and the notification of disbursements.

** Validation fees will be charged for the validation process, as such both successful and unsuccessful validations will be charged.
Section 1
Customer details

This form signs you up for the CAF Matched Giving Service. In addition, please complete a CAF Company Account Application Form to set up a CAF Company Account which we can use to make distributions to Beneficiaries. This application form can be downloaded online at www.cafonline.org/company/application-forms or is available from our Customer Services team on 03000 123 000 or companyaccounts@cafonline.org

If you are using this application form to submit an amended Matched Criteria Schedule, please enter your organisation name below then complete Sections 5 and 6.

The Service request (as set out below) is made by:

<table>
<thead>
<tr>
<th>Organisation details (the ‘Customer’)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organisation name</td>
</tr>
<tr>
<td>Registered company number</td>
</tr>
<tr>
<td>Registered address</td>
</tr>
<tr>
<td>Postcode</td>
</tr>
<tr>
<td>Main business address (if different from registered address)</td>
</tr>
<tr>
<td>Postcode</td>
</tr>
<tr>
<td>Website</td>
</tr>
<tr>
<td>Main telephone number</td>
</tr>
<tr>
<td>Main contact</td>
</tr>
<tr>
<td>Mr</td>
</tr>
<tr>
<td>Full forename(s)</td>
</tr>
<tr>
<td>Surname</td>
</tr>
<tr>
<td>Job title</td>
</tr>
<tr>
<td>Work address</td>
</tr>
<tr>
<td>Same as the organisation’s registered address</td>
</tr>
<tr>
<td>Same as the organisation’s main business address</td>
</tr>
<tr>
<td>Other (please specify)</td>
</tr>
<tr>
<td>Postcode</td>
</tr>
<tr>
<td>Work email address</td>
</tr>
<tr>
<td>Work telephone number</td>
</tr>
</tbody>
</table>
Users
These users will also be set up on your CAF Company Account associated with this CAF Matched Giving Service so you do not need to complete Section 4 (Users) on the CAF Company Account Application Form.

Levels of access
You must have at least one user authorised at level two, three and/or four.

Level 1 Information can:
request information on this CAF Matched Giving Service and associated CAF Company Account, eg, contacts/users, status and details of applications, but cannot make changes to the Service or authorise distributions to be made to Beneficiaries.

Level 2 Signatory can:
- authorise distributions to be made to Beneficiaries from the associated CAF Company Account
- request information on this CAF Matched Giving Service and associated CAF Company Account

Level 3 Contact Administrator can:
- add and/or remove contacts/users from this CAF Matched Giving Service and associated CAF Company Account
- authorise distributions to be made to Beneficiaries from the associated CAF Company Account
- request information on this CAF Matched Giving Service and associated CAF Company Account

Level 4 Service Administrator can:
- set up new CAF Matched Giving and other CAF Services on behalf of the Customer
- submit an amended Matching Criteria Schedule for this CAF Matched Giving Service

Text continued overleaf

Section 2
Users

Please list all individuals who you authorise to make requests of CAF relating to this CAF Matched Giving Service. Please indicate the level of access they may have by ticking the relevant box. Please continue on a separate sheet if you wish to add more individuals.

| Contact details |  
|-----------------|-------------------|
| [ ] Level 1 – Information | [ ] Level 2 – Signatory |
| [ ] Level 3 – Contact Administrator | [ ] Level 4 – Service Administrator |
| [ ] Mr | [ ] Mrs | [ ] Miss | [ ] Ms | [ ] Other |

Full forename(s) 
Surname

[ ] Contact details as previously provided on this form – skip to Identification details

If not previously provided please complete details below:

Job title

Work address
- [ ] Same as the organisation’s registered address
- [ ] Same as the organisation’s main business address

Other (please specify) 
Postcode

Work email address

Work telephone number

Identification details

Please provide the following details for any user authorised at level two, three or four.

If you have already provided us with your date of birth and home address, you do not need to do so again. Please tick the relevant box below to indicate when this was provided to us:
- [ ] on Organisation Registration Form
- [ ] on application for agreement number

If not previously provided please complete details below:

Date of birth 
Home address

Postcode

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.

Sample signature 
Date  d d / m m / y y y y
Contact details

- Level 1 – Information
- Level 3 – Contact Administrator
- Level 2 – Signatory
- Level 4 – Service Administrator

- Mr
- Mrs
- Miss
- Ms
- Other

Full forename(s)

Surname

- Contact details as previously provided on this form – skip to Identification details

If not previously provided please complete details below:

Job title

Work address
- Same as the organisation’s registered address
- Same as the organisation’s main business address

Other (please specify)

Postcode

Work email address

Work telephone number

Identification details

In order for CAF to comply with UK anti-money laundering regulations, we are required to complete checks on your organisation and on individuals that are involved in using the Services before the application can be accepted.

Wherever possible, these checks are performed electronically. In certain circumstances, however, it may be necessary to request additional identification documentation to satisfy our requirements under the regulations.

Please provide a sample signature which will be used to verify account requests. For this reason, please ensure all signatories sign clearly, using the same format of signature as they will on all future CAF Matched Giving and associated CAF Company Account requests.

Identification details

Please provide the following details for any user authorised at level two, three or four.

If you have already provided us with your date of birth and home address, you do not need to do so again. Please tick the relevant box below to indicate when this was provided to us:

- on Organisation Registration Form
- on application for agreement number

If not previously provided please complete details below:

Date of birth

Home address

Postcode

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.

Sample signature

Date  d d / m m / y y y y
Section 3
Reports and statements

At the end of each Matching Period, we will email you reports which list applications with details of Applicants and proposed Beneficiaries for your approval.

After the distributions have been made, we will confirm this to you by email.

We will encrypt any reports containing Personal Data and liaise with you in advance to let you know how to decrypt these reports.

Matching Period
This is the period over which we collate applications.

If you would like us to provide you with the site report, please ensure you provide us with a full site list and ask Applicants to include the relevant site code on their application. We are not able to provide site codes/reports for applications which relate to CAF Give As You Earn.

Site reports and donation type reports can only be provided by Matching Period, not by matching year to date.

You can also choose to receive the following reports by email once distributions have been made. Please let us know if you would like to receive these (please tick all that apply):

- [ ] Site report: Distributions for the Matching Period totalled by site/office location
- [ ] Donation type: Distributions for the Matching Period totalled by donation type (e.g., CAF Give As You Earn, fundraising)

Reports should be sent to

- [ ] Main contact
- [ ] Another contact whose details are given in Section 2 (Users)

Name of user

- [ ] Mr
- [ ] Mrs
- [ ] Miss
- [ ] Ms
- [ ] Other

Full forename(s)
Surname
Job title
Work address
- [ ] Same as the organisation’s registered address
- [ ] Same as the organisation’s main business address
- [ ] Other (please specify)
Postcode
Work email address
Work telephone number

Applicant statements

Applicant statements should be sent to (please tick one only):

- [ ] Applicants at their home addresses (as provided by the Applicant to CAF)
- [ ] The main contact specified on the Application Form who will send them to Applicants
- [ ] No Applicant statements are required
Section 4
Paying fees

Please indicate how you would like to pay the fees for the CAF Matched Giving Service:

☐ You wish to be invoiced for the fees
☐ Fees should be deducted from the CAF Company Account associated with the CAF Matched Giving Service
☐ Fees should be deducted from an existing CAF Company Account number

Section 5
Matching Criteria Schedule

The following Matching Criteria shall apply in respect of your CAF Matched Giving Service:

Beneficiaries
Please indicate the types of Beneficiaries you wish to be eligible for matching (tick all that apply)

☐ UK registered charities
☐ UK charitable organisations (entitled under Her Majesty’s Revenue and Customs rules to receive charitable donations)
☐ International charitable organisations (entitled under Her Majesty’s Revenue and Customs rules to receive charitable donations)

Restrictions
Please indicate any restrictions that you do not wish to be eligible for matching.

Notwithstanding the above, distributions will not be made in exchange for goods, services or entertainment.

Individual or team
Please indicate whether this CAF Matched Giving Service applies to activities by individuals or by teams (please tick one only):

☐ Individuals
☐ Teams

CAF will highlight on the report provided to the Customer any organisations it believes do not fulfil the Matching Criteria.

It is the responsibility of the Customer to identify and mark clearly (in accordance with guidance provided by CAF) on the report it returns to CAF any proposed Beneficiaries it wishes to be excluded.

CAF will maintain a list of proposed Beneficiaries that the Customer has previously confirmed do not fulfil the Matching Criteria and ensure these do not receive distributions.

If you wish to match individual and team activities, please complete a separate CAF Matched Giving Service Application Form for each.
CAF will use this information to give guidance to Applicants. CAF will include all applications on the reports sent to the Customer. It is the responsibility of the Customer to verify whether or not Applicants are to be Approved Applicants.

CAF will maintain a list of Applicants that the Customer has previously confirmed do not fulfil the Matching Criteria and ensure these are not considered for future distributions.

Please let us know the names of any other organisations whose Employees/contractors you wish to be Approved Applicants.

Team eligibility
For example, a team can only be made up of permanent Employees or at least 50% of team must be permanent Employees.

Approved Applicants
Please indicate who should be considered as an Approved Applicant for the purposes of your CAF Matched Giving Service (please tick all that apply):
- Permanent Employees
- Temporary Employees
- Pensioners
- Contractors
- Other:

Team eligibility
Please let us know of any eligibility rules for teams (if applicable)

Application type
Please indicate the types of applications from Approved Applicants you wish to be eligible for matching (please tick all that apply):
- Direct donations via your CAF Give As You Earn® scheme (sent by CAF directly to proposed Beneficiaries)
- CAF Charity Account donations via your CAF Give As You Earn® scheme – (sent by CAF to proposed Beneficiaries from the Approved Applicant’s CAF Charity Account)
- Volunteering
- Fundraising
- One-off or regular donations made not pursuant to the CAF Give As You Earn® Service, eg, by cash, cheque, credit/debit card, Direct Debit etc.
Matching frequency
Within two weeks of the end of each Matching Period, we will send you a report which lists applications, and gives details of Applicants and proposed Beneficiaries. Once you have approved these reports, we will send distributions to Beneficiaries.

If you want to set a maximum total annual distribution per Approved Applicant, please also let us know the date of the end of your matching year, which is the period to which this annual limit will apply.

Please complete the table to indicate:
Column 1: the frequency at which donations/activities that fulfil the above criteria should be matched
Column 2: the dates of each Matching Period
Column 3: the date of the end of the matching year (if applicable)

<table>
<thead>
<tr>
<th>Frequency (please tick one only)</th>
<th>Matching Period dates (please tick one only)</th>
<th>Matching year end dd/mm (if applicable) (please complete one only)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Weekly</td>
<td>Not applicable</td>
<td></td>
</tr>
<tr>
<td>Monthly</td>
<td>Not applicable</td>
<td></td>
</tr>
<tr>
<td>Quarterly</td>
<td>Jan – March, April – June, July – Sept, Oct – Dec</td>
<td></td>
</tr>
<tr>
<td></td>
<td>March – May, June – Aug, Sept – Nov, Dec – Feb</td>
<td></td>
</tr>
<tr>
<td>Annually</td>
<td>Not applicable</td>
<td></td>
</tr>
</tbody>
</table>
Minimum application
eg, you should state £10 if you will match any application of £10 or more.

Donations made via CAF Give As You Earn are treated as separate applications (rather than added together to meet the minimum limit (even if more than one donation is made to the same proposed Beneficiary in the same Matching Period by the same Applicant).

You can not set a minimum per Matching Period.

Maximum total annual distribution
eg, you should state £500 if you will make distributions up to £500 per Approved Applicant per year.

This is the maximum distribution you will pay, not the maximum application eligible for matching.

You can not set a maximum per application or Matching Period.

Percentage of application
eg, you should state 50% if you will match half the application.

Combining limits
You can apply more than one limit, eg, match up to 50% of the value of an application as long as each application is at least £20, up to a total of £250 per Approved Applicant per year.

You may be able to set different limits per donation type, eg, one limit for volunteering and one for fundraising. Please contact our Customer Services team on 03000 123000 to discuss your requirements.

Matching limits
If you wish, you can specify minimum and/or maximum limits for your CAF Matched Giving Service.

You can set three types of limit – you can choose one or more:
1. Minimum application that will be matched (per application, not per Matching Period)
2. Maximum total annual distribution per Approved Applicant/team per matching year, (not per application or Matching Period)
3. Percentage of application that will be matched

The minimum application shall be:
£________ per application

The maximum annual distribution shall be:
£________ per Approved Applicant/team per matching year

Applications will be matched up to _______% per application

If you want to match volunteering activities, please specify how much each hour of volunteering is worth, ie, you will match £10 for every hour volunteered (subject to any other matching limits specified above)
£________ per hour

Preferred Beneficiaries
If you wish, you can specify different matching limits for any preferred Beneficiaries, eg, your charity of the year – you may choose to match applications at 50%, except for your charity of the year, for which you will match applications at 100%. Please let us know of any preferred Beneficiaries limits and the Beneficiaries to which these apply.

For the following Beneficiaries, the following limits apply:
Preferred Beneficiary 1:

Preferred Beneficiary 2:

Preferred Beneficiary 3:

The minimum application shall be:
£________ per application

The maximum annual distribution shall be:
£________ per Approved Applicant/team per matching year

Applications will be matched up to _______% per application
Section 6
Certification

Please tick and certify each of the statements below:

- [ ] we agree to purchase the Services as set out in the CAF Matched Giving Service Schedule and we accept the CAF Services for Companies Terms and Conditions
- [ ] if there was anything that we did not fully understand, we have sought professional advice and guidance before sending this completed form to CAF
- [ ] the individuals detailed on this form have authorised the disclosure of their personal details to CAF
- [ ] the information given in this application is accurate
- [ ] we are responsible for updating CAF if the contact details or access privileges change (including if an individual is no longer employed by the Customer)

Signed for and on behalf of the Customer:

Mr  Mrs  Miss  Ms  Other

Full forename(s)
Surname
Job title

Authorised signatory  Date  d d / m m / y y y y

Next steps

Charities Aid Foundation (CAF) of 25 Kings Hill Avenue, Kings Hill, West Malling, Kent ME19 4TA whose charity registration number is 268369 will notify you in writing when your application has been accepted. No binding agreement shall exist until CAF sends the Customer written confirmation of the acceptance of the application.

Please also complete and submit an Organisation Registration Form, unless you have already done so and there are no changes to the information. Please call CAF Customer Services on 03000 123 000 if you need to obtain a copy of your Organisation Registration Form or would like to check the information you submitted previously.

Please take a copy of your signed form for your records and return your completed form to:

Customer Services
Charities Aid Foundation
25 Kings Hill Avenue
Kings Hill
West Malling
Kent ME19 4TA