

CAF CHARITABLE LEGACY SERVICE

SCHEDULE OF CHARGES AS AT 1ST NOVEMBER 2024

We will deduct an administration charge when we receive a gift from your estate on the following basis:

In respect of amounts gifted to CAF absolutely for our own charitable purposes:	Nil	
In respect of amounts gifted to CAF to distribute in accordance with a Letter of Wishes:	These charges are subject to a maximum fee of £25,000*	
	The first £150,000	4.00%
	£150,000.01 – £250,000	2.50%
	£250,000.01 – £750,000	1.50%
	£750,000.01 – £1,000,000	0.60%
	£1,100,000.01 – £2,000,000	0.30%
	£2,000,000.01 – £3,000,000	0.20%
	Above £3,000,000	0.05%
In respect of amounts gifted to an existing CAF Charitable Trust:	1% of the total amount gifted, subject to a minimum fee of £100 and a maximum fee of £25,000 Ongoing management charges apply to CAF Charitable Trusts – see here for more details	

Please note that the application of VAT varies depending on the service you access. Please refer to our Legacy team for more details.

As a not-for-profit organisation, we keep our charges to a minimum. The above charges may change from time to time and the actual charges applied will be those applicable to the CAF Charitable Legacy Service at the time we receive your legacy.

*We reserve the right to withdraw the fee cap of £25,000 if CAF reasonably considers that your legacy gift is particularly complex and the cost of administering this gift (including, where necessary, obtaining legal advice) significantly exceeds the cap.

Charges for Legacy gifts into a CAF Charity Account should be discussed with the Legacy team.

FOR MORE INFORMATION

T +44 (0)3000 123 108

E legacies@cafonline.org

W cafonline.org/legacies

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

Registered charity number 268369