

# CAF CHARITABLE TRUST

## Appointment of Successor

Please use this Form if you would like to appoint a Successor to your CAF Charitable Trust. Before completing this Form you should read the accompanying booklet: 'Guide to your CAF Charitable Trust' which contains important guidance notes. Please note this Form applies only to individuals, it is not applicable to a CAF Charitable Trust which has been opened by an Organisation.

Please complete this form in BLOCK CAPITALS.

### Data Protection and Privacy

We take data protection and privacy very seriously. Our Privacy notice at [www.cafonline.org/privacy](http://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.

If you have any questions when completing this Appointment of Successor Form, please contact a member of our Private Client team on 03000 123 028.

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

### Home address

If your address details change in the future, please notify a member of our Private Client team on 03000 123 028.

CAF Charitable Trust number
CAF Charitable Trust name
Original Donor full name
In the event of my death, I would like to appoint the person(s) named below to be the Successor(s) in operating my CAF Charitable Trust
Original Donor's Signature
Date dd/mm/yyyy

## First Successor

<input type="checkbox"/> Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Miss <input type="checkbox"/> Ms <input type="checkbox"/> Other
Full forename(s)
Surname
Home address
Postcode
Date of birth dd/mm/yyyy
Home telephone number
Work number
Mobile number
Email address
Nationality
Correspondence/statement address (if different from above)
Postcode

Gender  Male  Female

Country of residence

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

United Kingdom

Other (Please specify) \_\_\_\_\_

List all jurisdictions in which you submit a tax return.

United Kingdom

Other (Please specify) \_\_\_\_\_

Occupation(s) (please list all)

\_\_\_\_\_  
\_\_\_\_\_

## First Successor declaration

Please tick the boxes in the declaration section to confirm your understanding of the points raised.

**By signing this Form, I confirm:**

my willingness to undertake the role of Successor to this CAF Charitable Trust

I agree and accept to use the service as set out in the CAF Charitable Trust Terms and conditions

if there was anything that I did not fully understand, I have sought professional advice and guidance before signing this Appointment of Successor Form

the information given in this completed Form is accurate

I am responsible for updating CAF if my contact details change

my approval for CAF to carry out the necessary anti-money laundering checks in respect of this application:

Full name \_\_\_\_\_  
\_\_\_\_\_

First Successor's signature \_\_\_\_\_

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](http://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.

# Second Successor

## Home address

If your address details change in the future, please notify a member of our Private Client team on 03000 123 028.

Mr  Mrs  Miss  Ms  Other

Full forename(s)

Surname

Home address

Postcode

Date of birth

Home telephone number

Work number

Mobile number

Email address

Nationality

Correspondence/statement address (if different from above)

Postcode

Gender  Male  Female

Country of residence

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

United Kingdom

Other (Please specify)

List all jurisdictions in which you submit a tax return.

United Kingdom

Other (Please specify)

Occupation(s) (please list all)

## Second Successor declaration

Please tick the boxes in the declaration section to confirm your understanding of the points raised.

### By signing this Form, I confirm:

- my willingness to undertake the role of Successor to this CAF Charitable Trust
- I agree and accept to use the service as set out in the CAF Charitable Trust Terms and conditions
- if there was anything that I did not fully understand, I have sought professional advice and guidance before signing this Appointment of Successor Form
- the information given in this completed Form is accurate
- I am responsible for updating CAF if my contact details change
- my approval for CAF to carry out the necessary anti-money laundering checks in respect of this application:

Full name

Second Successor's signature

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.

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Please send the Form(s) to your Private Client Manager at:

CAF, Private Clients, 25 Kings Hill Avenue, Kings Hill, West Malling, Kent, ME19 4TA

### Charities Aid Foundation

25 Kings Hill Avenue,  
Kings Hill, West Malling,  
Kent, ME19 4TA

T: +44 (0)3000 123 028

F: +44 (0)3000 123 001

W: [www.cafonline.org](http://www.cafonline.org)

E: [trusts@cafonline.org](mailto:trusts@cafonline.org)

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Registered charity number 268369