

# CAF CHARITABLE LEGACY SERVICE

## Letter of wishes

Please complete this form in BLOCK CAPITALS.

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

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

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**

Mr  Mrs  Miss  Ms  Other \_\_\_\_\_

Full forename(s) \_\_\_\_\_

Surname \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Postcode \_\_\_\_\_

Date of birth

Email address \_\_\_\_\_  
\_\_\_\_\_

Phone number \_\_\_\_\_

Mobile number \_\_\_\_\_

**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.

**Details about your Will**

Date of Will

Name of Will Drafter (eg, firm of solicitors)  
\_\_\_\_\_  
\_\_\_\_\_

Name(s) of executor(s)  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**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.

**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:

**1 Name of Charitable Organisation**

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

Charity number (if known) \_\_\_\_\_

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

**2 Name of Charitable Organisation**

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

Charity number (if known) \_\_\_\_\_

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

**3 Name of Charitable Organisation**

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

Charity number (if known) \_\_\_\_\_

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

**4 Name of Charitable Organisation**

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

Charity number (if known) \_\_\_\_\_

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

**5 Name of Charitable Organisation**

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

Charity number (if known) \_\_\_\_\_

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

**6 Name of Charitable Organisation**

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

Charity number (if known) \_\_\_\_\_

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

**7 Name of Charitable Organisation**

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

Charity number (if known) \_\_\_\_\_

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

**8 Name of Charitable Organisation**

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

Charity number (if known)

\_\_\_\_\_

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

**9 Name of Charitable Organisation**

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

Charity number (if known)

\_\_\_\_\_

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

**10 Name of Charitable Organisation**

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

Charity number (if known)

\_\_\_\_\_

\_\_\_\_\_% 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 support other charities through CAF's General Fund

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

To be used by CAF as part of its social investment programme

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

AND/OR

3) As the holder of CAF Charity Account 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 distribute the remaining balance of my legacy through the CAF General Fund.

## 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.

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

Full name

Signature

Date d d / m m / y y y y

### 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.

We will not share any information prior to your death.

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

**T:** 03000 123 108  
**W:** [www.cafonline.org](http://www.cafonline.org)

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

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

Registered charity number 268369