

CAF CHARITABLE LEGACY SERVICE

Letter of wishes

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.

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

Date of Will

Name of Will Drafter (eg, firm of solicitors) _____

Name(s) of executor(s) _____

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.

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

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

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.

We will not share any information prior to your death.

CAF
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Kings Hill, West Malling
Kent, ME19 4TA

T: 03000 123 108
W: www.cafonline.org

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