

CAF Charity Account

LETTER OF WISHES

Before you start

Please refer to our CAF Charity Account Terms and Conditions for further information on Charity Account closure.

- This is a legal document.
- All information provided in this Form is confidential to CAF and carefully selected third parties that fulfil the provision of this product where necessary.
- If you would like to add additional charities to your Letter of Wishes, please list the charities and clearly state the percentage of distribution per charity to an aggregate value of 100% on a separate sheet. Do not attach this sheet to the original Letter of Wishes form.
- No marks including staples should be made on the original Letter of Wishes form, otherwise it will invalidate the Letter of Wishes.
- Make a photocopy of this Letter of Wishes form for your personal records before you send the completed original to us.
- You may wish to make Additional Signatories to your CAF Charity Account aware that you have completed this Letter of Wishes form.

Please complete this Form to tell us how you would like the remaining balance of funds comprising your CAF Charity Account to be distributed on your death.

Donor information

Please write in **BLOCK CAPITALS** or type.

CAF Charity Account number

Mr Mrs Miss Ms Other (please specify)

Full forename(s)

Surname

Donor instruction

Upon my death, I would like Charities Aid Foundation (CAF) to distribute the remaining funds of my CAF Charity Account as follows:

1 To the following named organisation(s), in the specific proportions set out below.

Please state how many organisations you would like to include in your Letter of Wishes:

Charitable organisation 1

Charity number % of total CAF Charity Account *(no decimal numbers)*

Charitable organisation 2

Charity number % of total CAF Charity Account *(no decimal numbers)*

Charitable organisation 3

Charity number % of total CAF Charity Account *(no decimal numbers)*

Please continue on a separate sheet if necessary.

Declaration

Please read the below declaration carefully, and based on your instruction in section one, tick those that apply.

2 Where I have either

(a) not named any specific charities above, or

(b) not distributed all funds in my CAF Charity Account to specific charities above,

I understand that the remaining balance of funds comprising my CAF Charity Account will be transferred to and distributed through the CAF General Fund. General Fund means the fund or funds from time to time established by the Trustees from time to time of CAF for Charitable Purposes for distribution by CAF in support of its mission.

3 Please read the declaration carefully, and based on your instruction in section one, tick those that apply.

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 to the charity with which it has merged, which would otherwise have been paid to the Original Charity. Similarly, if the Original Charity no longer exists or cannot be readily identified or validated by CAF, then CAF shall be entitled to distribute that part of the funds to another charity identified by CAF whose charitable purposes resemble those of the Original Charity, or to divide the money between the other charities in my Letter of Wishes.

I understand that where I have nominated more than one charity above, CAF will round to the nearest whole pound for distribution. Where CAF is unable to round a whole pound to meet the proposed distribution, CAF shall be entitled to distribute to a smaller number of charities/a single charity from those set out above.

I understand that CAF will take account of my wishes on the basis set out in the Terms and Conditions applicable to my CAF Charity Account.

This Letter of Wishes overrides and supersedes any previous Letter of Wishes that I have signed in respect of my CAF Charity Account.

Where closure occurs due to my death:

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 trustees/executors after my death

Full name

Account Handler's signatory

Date

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.

Next steps

Make copies of this Letter of Wishes form as needed. Please send the completed original form(s) along with any additional pages (if necessary) to: charityaccounts@cafonline.org

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.

For more information

Call **+44 (0)3000 123 000**
Email **charityaccounts@cafonline.org**
Visit **cafonline.org**

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

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

Registered charity number 268369