

# Donate a Gift of Shares to Charity

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If you would like to donate a gift to help support a charity, we can arrange the gift transfer on your behalf. Alternatively, we can transfer shares to one of the charities that we work with or to ShareGift ([www.sharegift.org](http://www.sharegift.org)) an organisation that aggregates and sells donated shares, giving the proceeds to a wide range of UK charities.

## Tax Information

A gift of qualifying shares can be a very effective way of making a donation to charity because such donations are eligible for Income Tax and Capital Gains Tax relief. If you leave a gift of shares to charity in your will, its value will be deducted from your estate before Inheritance Tax is levied. Gifts of shares made during your lifetime may also qualify for Inheritance Tax exemption. You should consult your accountant regarding the specific tax implications of any gift. Tax treatment depends on the personal circumstances of each individual and may be subject to change in the future. Details about gifting shares to charity and further tax information are available from HM Revenue & Customs, please visit [www.hmrc.gov.uk/individuals/giving/assets.htm](http://www.hmrc.gov.uk/individuals/giving/assets.htm)

## Important Information

- 1.** Lost certificates: you will need to obtain a replacement certificate in order to donate your shares. The company's registrars will be able to help you do this. You will find the registrars details on the dividend vouchers and other information relating to your shares, alternatively contact Redmayne-Bentley on **0113 243 6941**. For small holdings, there is usually no charge for duplicate certificates, but you will need to check with the relevant registrar.
- 2.** If any of the shareholders have died, please send a copy of the grant of probate or grant of confirmation as applicable, along with your donation. The death must be registered with the company's registrars first by sending them a sealed copy of grant of probate/grant of confirmation and a certified copy of the death certificate. Until this is done, a transfer cannot be made.
- 3.** Some certificates may be invalid or unable to be readily transferred. If a transfer proves to be impractical, the certificate will be returned to you with an explanation.
- 4.** Redmayne-Bentley cannot accept responsibility for share certificates sent to us in the post.
- 5.** The shares will still be registered in your name until the transfer is completed.
- 6.** Any personal data provided by you to us at any time will be processed in accordance with the Data Protection Act 1998. We will mainly use your personal data in connection with the provision of our services to you, but may also use it to contact you in connection with other services. We will not provide information to organisations without your consent, unless we are obliged to by the law or are requested to do so by any other regulatory body.

## How to Donate Your Shares

Simply complete the Share Donation Gift Transfer Form (detailed overleaf) and send it to Redmayne-Bentley along with your share certificate(s) and CREST Transfer Form(s) which you will need to request beforehand or download. The CREST Transfer form is available at [www.redmayne.co.uk/forms](http://www.redmayne.co.uk/forms) or by calling **0113 200 6580**. For stocks settled outside of CREST we will contact you to advise of the documentation required to effect the transfer.

You can also donate shares that are held in a Redmayne-Bentley nominee account.

# Share Donation Gift Transfer Form

## PERSONAL DETAILS (Please complete in BLOCK CAPITALS)

### PRIMARY CONTACT (for single applications)

Title (eg. Mr. Mrs. Dr.) \_\_\_\_\_ Surname \_\_\_\_\_

First name(s) (in full) \_\_\_\_\_

Address \_\_\_\_\_

Postcode \_\_\_\_\_

E-mail \_\_\_\_\_

Tel No. (this will only be used in the event of a query) \_\_\_\_\_

### SECONDARY CONTACT (for joint applications)

Title (eg. Mr. Mrs. Dr.) \_\_\_\_\_ Surname \_\_\_\_\_

First name(s) (in full) \_\_\_\_\_

Address \_\_\_\_\_

Postcode \_\_\_\_\_

E-mail \_\_\_\_\_

Tel No. (this will only be used in the event of a query) \_\_\_\_\_

## YOUR TRANSFER INSTRUCTIONS

I would like to donate the following stocks and/or shares through Redmayne-Bentley to:

Charity name \_\_\_\_\_

Charity telephone number \_\_\_\_\_

Charity address \_\_\_\_\_

Postcode \_\_\_\_\_

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

### Name of Stock

### Quantity

1 \_\_\_\_\_

2 \_\_\_\_\_

3 \_\_\_\_\_

4 \_\_\_\_\_

I have enclosed my share certificate(s) and CREST Transfer Form(s).<sup>†</sup>

I wish to make the transfer from my Redmayne-Bentley account \_\_\_\_\_

Please pass on my personal data and details of the transfer being made to the charity receiving the gift, as detailed above.

<sup>†</sup>Where you hold a certificate(s) see note 1 on the reverse of this leaflet. CREST Transfer Forms are available to download from the **Managing Your Account** section at [www.redmayne.co.uk/forms](http://www.redmayne.co.uk/forms) or call **0113 200 6580**.

## DECLARATION (Please complete)

\*Please delete as applicable.

1. I/We\* hereby instruct Redmayne-Bentley to transfer the stock(s) to the named charity, as detailed above.

2. I/We\* confirm that the transfer of stock(s) has no consideration of monies and is being transferred by way of a gift.

Please sign here

Date

Date

X

(Primary Account Holder)

X

(Joint Account Holder (if applicable))

Once completed, please return to: **ISA Department, Redmayne-Bentley LLP, 9 Bond Court, Leeds LS1 2JZ.**

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Branches throughout the UK and in the Republic of Ireland, for details visit [www.redmayne.co.uk](http://www.redmayne.co.uk)



CHARITY/GIFT 03/15/003 BBB7378