

CAF AMERICAN DONOR FUND

The leading Donor Advised Fund for dual US and UK taxpayers

www.cafonline.org/cadf



With over 20 years' experience, we're the leading provider of philanthropy services for dual US and UK taxpayers. The CAF American Donor Fund is a dual qualified Donor Advised Fund, which can help you maximise the value of your gifts to charitable organisations and claim eligible US and UK tax relief on your global giving, including adding 25% through UK Gift Aid where applicable.

Why choose the CAF American Donor Fund?

- Contributions made to the CAF American Donor Fund are tax-effective in the US and the UK.
- Contributions qualify for UK Gift Aid, where applicable, to increase the value of contributions made by 25% and the related US tax deduction by 25%.
- We can hold USD, GBP and EUR, allowing you to organise your giving in multiple currencies within one account.
- You can build a fund and request grants to charitable causes when it best suits you.
- There are no set-up fees or ongoing accounting and legal costs associated with private foundations.
- Fees are recovered from your contributions and are tax-deductible along with your contribution.
- Our specialist team of Relationship Managers provides expertise to support your giving journey.
- Our charity verification service ensures regulatory compliance is adhered to for all overseas charitable giving.

Giving through us in your Will

- Many people need to set up their charitable giving in their Will so that it qualifies as charitable in the US and the UK. Our legacy service allows donors to do just that.
- If you would like to name the CAF American Donor Fund in your Will, we can provide suggested wording to your legal advisor, and then ask you to let us know your chosen charitable causes by completing a Letter of Wishes.
- If over time your choice of charities changes, the Letter of Wishes can be updated as many times as you wish without needing to change your Will.

Flexible solutions for your charitable giving



One-off or occasional giving

Our **Donor Advised Gift** service allows you one-off or ad hoc giving with no long-term commitment and no minimum contribution.



Regular giving

Our **Donor Advised Fund** allows you to build a long-term fund to distribute to the charities you recommend, whenever you want to. A minimum balance needs to be maintained.



Long-term giving

Our **Premier Donor Advised Fund** allows you to invest your capital to enable growth of your funds and appoint successors to continue your charitable giving.

HOW THE FUND WORKS

APPLY



Step 1

Complete our online application form at www.cafonline.org/cadf/apply

Step 2

We process your application and contact you if we need further information.



ONCE YOUR FUND IS OPEN

Step 3

When you are ready to make a contribution, we accept the following:



Cash

By wire transfer, any major currency, UK onshore and UK offshore.*



Stocks and shares**

UK onshore and UK offshore.



UK salary sacrifice giving**

e.g. CAF Give As You Earn.



Non-cash gifts**

e.g. art, antiques and property.

* UK offshore contributions are not treated as a remittance for UK tax purposes.

** Please note: contributions of stock, salary sacrifice and non-cash assets are not eligible for UK Gift Aid.

ONCE YOU'VE MADE A CONTRIBUTION

We will issue you with two receipts; one for UK tax returns and one for US tax returns.

Step 4

We apply for UK Gift Aid where eligible and credit it to your fund.



Our online portal enables you to **recommend grants** to charities.



Premier Donor Advised Fund clients can request that we invest the funds.

CONTACT US

Call +44 (0) 3000 123 150 Email cadf@cafonline.org Visit www.cafonline.org/cadf

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

The CAF American Donor Fund is the trading name of Southampton Row Trust Ltd, a company registered in England and Wales with company number 3900842 and with the Charity Commission registered charity number 1079020. Southampton Row Trust Ltd is a wholly owned subsidiary of CAF America, a US 501(c)(3) public charity. CAF America Employer Identification Number (EIN) 43-1634280. Registered Office: 25 Kings Hill Avenue, West Malling, Kent ME19 4TA, United Kingdom.

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Charities Aid Foundation