Legacy to CAF American Donor Fund (CADF)

Set out below is a suggested form of words to enable an individual who is liable to tax in both the US and the UK to leave a legacy to CADF which is a dual qualifying charity. For this purpose, we use the name Southampton Row Trust Limited (SRTL) which is the registered charity that underlies CADF.

The CADF scheme is modelled on the long established Legacy Service offered by Charities Aid Foundation (CAF) enabling the testator to make a legacy to SRTL and he/she then has the opportunity to make suggestions to the SRTL Trustees as to how the funds might be applied.

In order to meet legislative requirements in the UK and the USA, the SRTL Trustees have ultimate control, authority and discretion in dealing with any funds paid to them and this is referred to below, as part of the wording to be included in the will.

I give:

- the sum of $/£__________ (say .......... Pounds/Dollars) to; or
- my residuary estate to my executors and trustees upon trust for; or
- all the remainder of my estate to my executors and trustees upon trust for; or
- all the remainder of my estate to my executors and trustees upon trust to sell, call in or convert the same and after payment of my debts and funeral and testamentary expenses to hold the same for

Southampton Row Trust Limited ("SRTL") of 25 Kings Hill Avenue, Kings Hill, West Malling, Kent ME19 4TA (Registered Charity No. 1079020) to be applied for charitable purposes and I request SRT to give effect to any expression of wishes left by me relating to the distribution and I authorise SRTL to deduct its usual administrative charges and sums in connection with the distribution and I direct that the receipt of a proper officer of SRTL shall be a full discharge to my executors or trustees.

I understand that (1) my gift to SRTL becomes the property of SRTL and that SRTL has ultimate control authority and discretion with regard to its assets and (2) all grants made by SRTL are in its sole and independent discretion.

If you have any queries, please contact CADF on 01732 520150.