



HAWKS' CLUB

## The Hawks' Charitable Trust: How to Donate

### About the Trust:

The objective of The Hawks' Charitable Trust is to support the pursuit of excellence in sport in the University of Cambridge. The current policy is to distribute available funds through a large number of modest awards to individuals, rather than a few large ones. Awards are made from income, capital being conserved for the growth of the fund. The largest single awards (currently £750) are named for major donors to the fund: David Jennens, Sir Adrian Cadbury, Bob Barber and Sir Arthur Marshall. Further names may be added as appropriate.

The Trust would like to increase its scope. Possible areas for support if funds allowed would include:

- Much larger awards to individuals where merited (for example where international potential is identified).
- Support for Clubs or Teams on a more general basis.
- Support for the establishment or development of sporting facilities.

Such ambitions can only be realised from substantial increases to the scale of the fund, and this depends upon donations and bequests. This document includes forms and/or instructions to enable you to:

- ◆ Make a single, one off donation, including support for a particular cause.
- ◆ Give regularly to The Hawks' Charitable Trust.
- ◆ Make a bequest to The Hawks' Charitable Trust in your will.
- ◆ Make a donation if you are a citizen of the United States of America.
- ◆ Make a donation online from anywhere in the world.
- ◆ Use the "Give As You Earn" scheme if you are in permanent employment.
- ◆ Donate Shares, Securities, or other investments in a Tax efficient manner.

For further information about charitable giving refer to the Charities Aid Foundation web site:

<http://www.cafonline.org.uk>

### The benefits of Gift Aid:

Since April 2000 the Gift Aid scheme simply means that any donation you make over £1.00 is worth an extra 28% to The Hawks' Charitable Trust, provided UK tax has been levied on your income at the time you earned it (and this includes payments into a pension), The Hawks' Charitable Trust can claim back the tax on your one-off or regular gift at no extra cost to yourself.

To make a Gift Aid donation, either as a single or regular gift, simply complete the Gift Aid Declaration Form below and send it, together with your gift, to The Hawks' Charitable Trust, 18 Portugal Place, Cambridge, CB5 8AF.

You can also make your Gift Aid declaration over the telephone. The Hawks' Club Administrator can help you with this. Please call Sarah on 01223 314666. If you have given to the Trust since April 2000 it is likely that we already hold a Gift Aid declaration from you, and a further form is not necessary. Please check with Sarah if you are not sure.

Title:  Forenames:  Surname:

Address:

Post Code:  Telephone No:

Email:  Years in residence:

I am a UK taxpayer paying at the basic rate or higher rate of tax. I would like The Hawks' Charitable Trust to treat as Gift Aid donations all donations I have made since 6th April 2000 and any donations I make from the date of this declaration until further notice.

(Please sign the declaration and return to The Hawks' Charitable Trust, 18 Portugal Place, Cambridge, CB5 8AF)

Signature:  Date:

Data Protection Act 1998: the information contained on this form may be added to the database of The Hawks' Charitable Trust and will be used solely in the administration of the Trust.

The Hawks' Charitable Trust is an Exempt Statutory Charity (Inland Revenue No: 1052904)



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### Making a one-off gift to The Hawks' Charitable Trust

(please refer to separate form for information about giving regularly)

1. I enclose my:  cheque,  postal order,  CAF voucher,  traveller's cheque payable to **The Hawks' Charitable Trust** (please tick as appropriate)

**or**

I wish to pay by (please tick as appropriate):

Mastercard  Visa Debit  Switch  Visa Credit  Solo  JCB  Electron

Credit Card Number:

Card Start Date:

Card Expiry Date:

3 digit security code:

Issue No (Switch only):

Signature:

Date:

2. Please use my "one off" donation of £  to contribute to The Hawks' Charitable Trust's overall capital reserve;

**or**

Subject to compliance with the objectives of the Trust, please designate my "one off" donation of £  to (please describe):

3. If you are a UK income tax payer please remember to complete the Gift Aid Declaration form on page 1 and return it with this form.



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# The Hawks' Charitable Trust: How to Donate

## Giving regularly to The Hawks' Charitable Trust

*(please refer to separate form for information about making a one-off donation)*

If you are a UK Bank account holder and you would like to make a regular donation to The Hawks' Charitable Trust, simply complete the Banker's Order Form below and return it to The Hawks' Charitable Trust, 18 Portugal Place, Cambridge, CB5 8AF.

If you are a UK income tax payer, please also remember to complete the Gift Aid Declaration form on page 1, and return that with the Banker's Order Form.

- I wish to make a regular commitment to support The Hawks' Charitable Trust. Please use my donation as the Trustees think fit;
- OR** *(please tick as appropriate)*
- Subject to compliance with the objectives of the Trust, please designate my donation to the following cause *(please specify)*:

### Banker's Order Form

To (name of your bank):

Bank Address:

Post Code:

Please pay, from my account detailed below, to:  
"The Hawks' Charitable Trust", Lloyds TSB, University Branch, 3 Sidney Street, Cambridge CB2 3HQ,  
Sort code: 30-91-56, Account number: 3752495.

The sum of £.....   
*(amount in words)* *(amount in figures)*

each month     each quarter     each year *(please tick as appropriate)*

Starting on (date):  until further notice *(you can cancel this Order at any time)*

Quoting Ref *(to be completed by The Hawks' Charitable Trust)*:

My Account Name:

My Account Sort Code:     Account Number:

My name *(capitals)*:

Signature:

Date:



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# The Hawks' Charitable Trust: How to Donate

## Making a bequest to The Hawks' Charitable Trust

*(please refer to separate forms for information about making donations)*

When making a legacy to The Hawks' Charitable Trust, you can do so in the confidence that sensitive and appropriate stewardship of your gift is of paramount importance to us.

The Trust strongly recommends that you seek professional legal advice when writing your Will, or adding a Codicil if you have already made a Will. If you decide to make a legacy to The Hawks' Charitable Trust your solicitor needs to be aware that, if the Trust is to benefit, then the exact wording in the following statement must be used in your Will or Codicil:

"I bequeath to the Trustees of The Hawks' Charitable Trust, based at 18 Portugal Place, Cambridge, CB5 8AF, the sum of ... ..(for general purposes)/(for the purpose of ....."

When discussing your Will or Codicil with your solicitor, you may find it helpful to know that there are various types of legacy from which to choose:

- The Pecuniary Legacy: The pecuniary or monetary legacy enables you to donate a specific amount of money to a named individual or organisation. Provision should be made for index-linking the legacy, so that the value of the gift does not decrease with inflation.
- The Residuary Legacy: The residuary legacy involves leaving all or part of the net residue of your estate to a named individual or organisation once all pecuniary legacies, debts and other liabilities have been met.
- The Reversionary Legacy is another popular type of legacy that enables you to provide for your loved ones first and benefit The Hawks' Charitable Trust, for example, afterwards. A reversionary legacy involves leaving your assets to trustees so beneficiaries can enjoy the income during their lifetime, with the whole or a part reverting to the Trust on their death.
- The Specific or Non-pecuniary Legacy: This type of legacy allows you to leave a specific personal possession to The Hawks' Charitable Trust, for example property, stocks and shares, works of art, or other valuables.

As a way of expressing the Trust's gratitude for your legacy, The Hawks' Charitable Trust offers naming opportunities in honour of your bequest. These consist of naming specific bursaries after the donor.

### Legacy Pledge Form

It is a great help to The Hawks' Charitable Trust to have an indication of a planned bequest so that we can thank those who show their support for the Trust in this important way. However, a legacy pledge is not a legally binding document, nor does it have any legal implications.

If you have chosen to remember The Hawks' Charitable Trust in your Will or by adding a Codicil to your existing Will, the Trust would be deeply grateful if you would complete the form below and send to us at 18 Portugal Place, Cambridge, CB5 8AF. While you would be helping to guide Trust strategy if you complete the confidential Legacy Pledge Form, the Trust fully understands that you may not wish to disclose this personal information.

Your name:

Address:

Post Code:

I have remembered The Hawks' Charitable Trust in my Will/Codicil with:

A pecuniary bequest of:  A residuary bequest of:

A specific/non pecuniary bequest of:

Or other:

Purpose of the bequest (e.g. general purposes):

Please tick the box if you wish your intentions to remain anonymous and if you do not wish your name to be included on any donor lists that may be published.

Data Protection Act 1998: the information contained on this form may be added to the database of The Hawks' Charitable Trust and will be used solely in the administration of the Trust.

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## The Hawks' Charitable Trust: How to Donate

### Making a donation from outside the UK to The Hawks' Charitable Trust

#### A gift to The Hawks' Charitable Trust from the US:

I would like to give a tax-efficient gift to The Hawks' Charitable Trust of (*please tick as appropriate*):

\$50     \$100     \$500     \$1,000     \$5,000     \$10,000

I will send my gift for maximum tax-efficiency to the following:

Cambridge in America  
PO Box 9123 JAF BLG  
New York  
NY 10019-7399

Gifts can be made using checks, Visa, Mastercard, or American Express. Gifts to Cambridge in America qualify for an income tax deduction to the limits allowed by law. Checks should be made payable to Cambridge in America. Please indicate that you would like the gift to be allocated to The Hawks' Charitable Trust. Gifts of cash may also be made by wire transfer: please telephone 212-984-0960, or e-mail [mail@cantab.org](mailto:mail@cantab.org) for further information

#### A gift online from anywhere in the world:

Details of our internet payment process will be made available shortly.



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## The Hawks' Charitable Trust: How to Donate

### **Tax efficient giving at your office:**

You can opt for this method of giving, if your employer operates the Give As You Earn scheme. Since April 2000, payroll giving allows you to give to The Hawks' Charitable Trust as frequently and as much as you like. You can vary or cancel the amount that you donate at any time. Payments are made out of your gross income before Income Tax is levied - saving you tax on your gift. Ask your employer if they operate a giving at the office scheme like Give As You Earn.

If you or your employer would like to find out more about Give as You Earn, refer to the Charities Aid Foundation website:

<http://www.cafonline.org.uk>

### **Tax efficient gifts of Shares:**

Since April 2000 UK taxpayers can get income tax relief on gifts to charity of most shares, securities and other investments. Companies can also secure tax relief for the same type of gifts. You can now claim tax relief equal to the market value of the shares on the day that you make the gift, together with any associated costs such as broker's fees. The relief is against your Income Tax for that year. So, if you give a charity £1,000 worth of shares, for example, and you are a higher taxpayer, you will pay £400 less in Income Tax that year.

Additionally you will not have to pay Capital Gains Tax (CGT) on any increase in the value of the shares since you bought them. In theory this could mean a further 'saving' of up to 40%. If your shares go down in value, you should be aware that you would be unable to use the loss to offset any other CGT liability you may have.

For more information about donating shares refer to the Charities Aid Foundation web site:

<http://www.cafonline.org.uk>