Declaration of trust: example outline

For when a person or organisation already holds property and declares that it holds it for a charitable purpose. Version 0.1.

> For information only. This is an example outline to show the shape of the document, not a document ready to sign, and not legal or tax advice. The law differs between England and Wales, Scotland, Northern Ireland and other countries. Have a qualified solicitor draft or review the final version, and check charity and tax registration with the Charity Commission (or your regulator) and HMRC, before anyone signs, gives or relies on it. Replace every [bracketed] item.

1. The declaration

Date

Name and address of the person or organisation making the declaration (the trustee)

The property held on trust (money, a building, shares or other property)

I, [name], declare that from today I hold the property described above on trust for the charitable purposes below, and not for my own benefit.

2. Purposes

The charitable purposes (for example, the relief of poverty in [area])

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3. Terms

1. [If the property is to be a permanent endowment: the property itself is kept and only its income is used.]
2. The trustee keeps the property separate from their own, with proper records.
3. The trustee may appoint additional or replacement trustees in writing.

4. Signatures

Signed by the trustee (with a witness's name, address and signature)
