Deed of gift: example outline

For a donor giving money or property to a charity's permanent endowment. 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. Parties and date

Date of this deed

Donor (full name and address)

The charity (name and registered charity number)

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2. The gift

1. The donor gives the property in the schedule to the charity, outright and for good. The gift cannot be taken back.
2. The donor asks that the gift is added to the charity's permanent endowment, so that it is kept and only its income is used for the charity's purposes.
3. The donor receives nothing in return for the gift.

3. Restrictions (if any)

Any wishes about how the income is used (for example, a phase of the grant policy or an area of benefit. Wishes are not binding unless stated as conditions.)

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4. Gift Aid declaration (UK taxpayers)

I want to Gift Aid this donation and any donations I make in the future or have made in the past four years to [charity name]. I am a UK taxpayer and understand that if I pay less Income Tax and/or Capital Gains Tax than the amount of Gift Aid claimed on all my donations in that tax year it is my responsibility to pay any difference.

Donor's full name and home address, with postcode

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5. Signatures

Signed as a deed by the donor (with a witness's name, address and signature)

Accepted on behalf of the charity (two trustees)

Schedule

Property given (amount of money, or description of the property, shares or land)
