

**Instructions to gift securities to
Cranleigh Foundation via Brewin Dolphin**

Registered Charity Number: 1122918

Full Name of Donor(s)		D.O.B.: / /
		D.O.B.: / /
Address		
Telephone:		Email:

A - Details of securities to be transferred

Number of shares		Current Registration?
		Own Name <input type="checkbox"/>
		Nominee <input type="checkbox"/>
		(Please tick box as appropriate)

B - Contact details of Nominee

Contact Name and Company	
Address	
Reference Details	
Telephone/Fax:	Email:

Note: Brewin Dolphin reserve the right to refuse shares which it considers unacceptable for the aforementioned arrangement.

I authorise Brewin Dolphin to contact the company listed in section B, to arrange for the re-registration and transfer of those securities listed in section A above, as a gift to *The Cranleigh Foundation*.

We have responsibilities under UK anti-money laundering legislation and the Proceeds of Crime Act 2002 to confirm the identity and permanent address of our clients. Where you are a client resident in the United Kingdom we will undertake an electronic anti-money laundering check of the personal data you have provided. The check will be undertaken via a reputable referencing agency, which will retain a record of this check. Where an electronic check of personal data is not appropriate or suitable you will be asked to provide documents to verify your personal details. These will generally be a certified copy of your passport and photocard driving licence or other acceptable documents, details of which can be supplied on request.

We also have responsibilities under these laws to confirm the identity and permanent address of any third party or beneficial owner connected to your portfolio. You confirm that where requested this information will be provided promptly and will be accurate. We reserve the right not to make payments if they are to be made to third parties or to bank accounts not in your name(s), or held in a jurisdiction outside of the EU.

Signed: _____ Signed: _____

Please print name: _____ Please print name: _____

Date: _____ Date: _____

Instructions

Please contact Cranleigh Foundation who will then notify Tim Cook at Brewin Dolphin (BD) in the first instance for specific instructions.

As noted earlier the process for transferring shares is largely dependant on what form the shares are held in:

Certificated

Paper Certificates (UK Only)

- ▶ Securities held in name of donor will require donor to sign transfer forms in order to register the holding into a Brewin Dolphin nominee for the account of Cranleigh Foundation.
- ▶ Tim Cook will provide relevant transfers on completion and receipt of Appendix B. Donor to sign transfers and return with appropriate copies of certificates to Brewin Dolphin

Electronic

Securities held in a nominee account on behalf of donor or in a Unit Trust

- ▶ On return of Appendix B, Tim Cook will liaise with nominee company and effect electronic transfer of securities.

Notes

- ▶ You should be aware that your existing nominee account manager may charge you for the transfer.
- ▶ There can be tax benefits to giving gifts. You should speak to your financial adviser should you require further information about these.
- ▶ Brewin Dolphin reserves the right to impose restrictions on acceptance of shares to the extent that they must be UK Companies and more than a 'negligible' amount

Contacts at Brewin Dolphin

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Approved by Brewin Dolphin in accordance with S.21 of the Financial Services and Markets Act 2000