

# Share giving form

## for UK Tax payers



WINCHESTER  
COLLEGE

WINCHESTER COLLEGE WYKEHAM CAMPAIGN

**Charity name:** WINCHESTER COLLEGE HM Revenue & Customs No. X7201

Winchester College Development Office, 17 College Street, Winchester, SO23 9LX

Telephone: 01962 621217 Facsimile: 01962 621218 Email: [development@wincoll.ac.uk](mailto:development@wincoll.ac.uk) [www.winchestercollege.org](http://www.winchestercollege.org)

### PLEASE READ

Upon receipt of this form, the College stockbroker will contact your stockbroker to arrange transfer of the shares. The College's normal policy is to sell donated shares upon receipt and reinvest the proceeds in its own portfolio.

If the shares are held in electronic form, please provide the details of the bank/stockbroker acting for you. If you hold shares in certificated form, then the share certificates could be forwarded to us (Winchester College Development Office) and listed here without your stockbroker details.

### YOUR DETAILS

NAME: \_\_\_\_\_ PLEASE WRITE IN BLOCK CAPITALS

ADDRESS: \_\_\_\_\_

POSTCODE: \_\_\_\_\_

EMAIL: \_\_\_\_\_

TELEPHONE: \_\_\_\_\_

### Endowment Funds

I wish to support the general **Endowment Fund**:

Gifts are added to the College's Endowment Fund, a percentage of which gets disbursed each year, in support of the School's primary objectives: bursary provision, maintenance of historic buildings and Quiristers.

I wish to allocate my gift specifically to:  **Bursaries**  **Historic Buildings**  **Quiristers**

If you particularly wish your gift to be allocated to one or more of the primary endowment objectives, please specify by ticking one or more of the boxes above.

*or*

### Annual Fund

I wish to support the **Annual Fund**:

The Annual Fund allows donors to assist the development of Winchester College in an immediate way, since gifts to the Fund are generally spent on a range of important smaller projects that can be achieved within a twelve month period. From time to time the annual fund is spent on endowment objectives.

If you wish your gift to be anonymous, please tick this box:

## STOCKBROKER DETAILS

NAME OF STOCKBROKER:

PLEASE WRITE IN BLOCK CAPITALS

ADDRESS:

POSTCODE:

EMAIL:

TELEPHONE:

## SHARE DETAILS

COMPANY SHARES ARE IN	NUMBER OF SHARES	CLASS OF SHARES	DENOMINATION*
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\* As a per share Amount, (e.g. – £1 share, 10p share)

Signature:

Date: / /

### CONFIDENTIALITY STATEMENT

The personal details you supply for processing your gift will be used by Winchester College and Winchester College Society, and upon appropriate application from its membership, will be used to send you information on our activities and events. Your details will be used only by Winchester College and Winchester College Society, and will not be made available to any third party. If you do not wish to receive further information from either party, please tick the box above. An online change of details form is available for alumni at: <http://www.wyksoc.com>. In addition, by providing your email address, you are deemed to have opted in to receiving electronic communication from Winchester College and Winchester College Society that we think will be of interest to you. You may of course opt out of receiving such communications at any time by advising us accordingly. Your email address will NOT be passed to any outside organisation.

### Tax efficient giving – stocks and shares

Giving stocks and shares can be a particularly tax-efficient way of donating to the College. Generous tax relief is available to donors, combining relief on Income Tax and Capital Gains Tax.

Gifts of stocks and shares qualify for tax relief equal to the market value of the investments on the day the gift is made, including associated costs such as broker fees. The tax relief can be claimed for the year in which the gift is made.

#### If you would like to take advantage of this relief, please complete the Share Donation Form.

A gift to the College of £10,000 worth of shares made by an individual who is a basic rate tax payer would reduce his or her Income Tax by £2,000 for the year; the same gift would reduce a 40% taxpayer's Income Tax by £4,000 and from 2010/2011 would give a £5,000 reduction for those with taxable income over £150,000.

Additionally, the donor would not have to pay any Capital Gains Tax (CGT) on any increase in the value of the shares since they were acquired. If the shares have gone down in value, however, it is not possible to use this loss to offset any other CGT liabilities.

	tax rate:	40%	50%
Value of shares donated to Winchester College (with a chargeable gain of, say, £4,000)		£10,000	£10,000
Donor deducts the £10,000 from annual income liable to tax (assuming a 40% & 50% tax rate)	tax saving:	£4,000	£5,000
Donor saves a further 18% in CGT, which would have been paid on selling the shares	tax saving:	£720	£720
<b>Net cost to donor</b>		<b>£5,280</b>	<b>£4,280</b>
<b>Winchester College receives</b>		<b>£10,000</b>	<b>£10,000</b>

- Upon receipt of your Share Donation Form, the College's stockbroker will contact your stockbroker to arrange the transfer.
- Unless advised to the contrary in advance, it is the College's normal policy to sell all shares donated upon receipt to free up the funds to support its relevant activities immediately.
- The College's stockbrokers are:  
UBS AG  
1 Curzon Street, London W1J 5UB,  
Telephone: 020 7567 0707  
Contact: Andrew Wauchope or Elaine Hards
- The College's stockbrokers will issue the tax certificate required to claim tax relief.
- Relief is available for gifts of:
  - shares and securities listed or dealt in on the UK Stock Exchange, including the Alternative Investment Market
  - shares and securities listed or dealt in on recognised foreign stock exchanges
  - units in an Authorised Unit Trust (AUT)
  - shares in a UK Open-Ended Investment Company (OEIC)
  - securities on the Plus-Listed market operated by PLUS Markets plc (but not the Plus Traded or the Plus Quoted markets)
  - holdings in certain foreign collective investment schemes – generally schemes set up outside the UK that are similar to AUTs and OEICs
  - land and property in the UK
- You do not need to be resident in the UK to benefit from this relief, so long as you pay sufficient UK Income Tax and/or Capital Gains Tax to cover the relief.