THE CAF AMERICAN DONOR FUND

A dual qualified Donor Advised Fund for U.S. and U.K. taxpayers



What is the CAF American Donor Fund?

As a taxpayer in both the U.S. and U.K., did you know you can get tax relief in both countries for the same charitable gift when you give globally? Ideally, you want a giving account that handles those matters for you, smartly and tax-efficiently.

We've been providing U.S./U.K. dual qualified philanthropy services for 25 years. Our CAF American Donor Fund helps dual U.S./U.K. taxpayers like you to increase your giving by 25% thanks to U.K. Gift Aid, where applicable. It also increases the related U.S. tax deduction by 25%.

Ways of giving

ONE-OFF OR OCCASIONAL GIVING

Our Donor Advised Gift service lets you gift funds whenever you want to. There's no need for a minimum balance, or a long-term commitment.

REGULAR GIVING

Our Donor Advised Fund means you can build a fund to distribute to the charities you recommend, whenever you want. You will need to maintain a minimum balance.

LONG-TERM GIVING

Our Premier Donor Advised Fund offers you the benefits of a Donor Advised Fund, plus the option of asking CAF to invest the capital. This gives it the potential to grow, so your generosity can have even more social impact. You can appoint successors to advise the fund and foster a culture of giving within your family.

Why choose the CAF American Donor Fund?

Tax-effective contributions
For you as a dual U.S./U.K. taxpayer.

Claim eligible U.S. and U.K. tax relief
On your global giving.

U.K. Gift Aid on cash contributions
Where eligible, to add 25% to the contribution value and increase the related U.S. tax deduction by 25%.

Gift in three currencies within one account
U.S. Dollars, Euros or Pounds Sterling.

Give flexibly
Build a fund and request grants to charitable causes whenever suits you.

Reduce costs
No set-up fees or ongoing accounting and legal costs for private foundations.

Here to help
Our specialist Relationship Managers are ready to offer expert support on your giving journey.

Reassurance
CAF distribute over $1.2 billion USD to charities in 119 countries each year.

Strategic advice
To help your clients maximize their charitable impact.

Future giving plans

Our legacy service means your global giving can continue beyond your lifetime. We can help your giving in your Will, so it qualifies as charitable in the U.S. and the U.K.

CAF
Charities Aid Foundation

How the fund works

APPLY

Fill out our online application form:
www.cafonline.org/cadf/apply

STEP 1

We'll process your application and let you know if we need more information.

STEP 2

ONCE YOUR FUND IS OPEN

How you give is up to you:

- Give cash in major currencies – U.S. Dollars, Pounds Sterling or Euros; U.K. onshore and U.K. offshore
- Non-cash gifts – on request, we can consider gifts of non-cash assets, such as property*
- Stocks and shares – U.K. onshore and U.K. offshore*

When you've made a contribution

We'll provide two receipts – one each for your U.K. and U.S. tax returns.

* Please note: contributions of stock and non-cash assets are not eligible for U.K. Gift Aid.

STEP 3

ONCE YOU'VE DONATED

We'll send you two receipts: one each for U.K. and U.S. tax returns.

We'll apply for U.K. Gift Aid, where eligible, and credit your fund.

Use our online portal to recommend grants to charities.

Premier Donor Advised Fund clients can request that we invest the funds.

STEP 4

TALK WITH US ABOUT THE CAF AMERICAN DONOR FUND

Call: +1 (202) 793 2232 (New York office) +44 (0) 3000 123 150 (U.K. office)

Email: cadf@cafonline.org Visit: cafonline.org/cadf

Telephone lines are open Monday to Friday, 9am to 5pm GMT (except publicholidays).

The CAF American Donor Fund is the trading name of Southampton Row Trust Ltd, a company registered in England and Wales with company number 3900842 and with the Charity Commission registered charity number 1079020. Southampton Row Trust Ltd is a wholly owned subsidiary of CAF America, a U.S. 501(c)(3) public charity. CAF America Employer Identification Number (EIN) 43-1634280. Registered Office: 25 Kings Hill Avenue, West Malling, Kent ME19 4TA, United Kingdom.