Large Donations

How ShareGift handles large donations



ShareGift 30

Celebrating 30 years

Sharegift.org

What our donors say:

"I have donated to ShareGift for a long time and think that it is excellent. It provides a painless one stop service for the tax-efficient donation of shares and a great way to help fund charitable causes which I want to support. Long may it continue!"

"ShareGift is an excellent charity that makes it very easy to donate shares, especially if you wish to help support several charities, as I did.

It is a great relief not having to go through the whole rigmarole of finding a broker who won't charge you a fortune, selling the shares, then setting up bank transfers to distribute the proceeds to the charities because some other forms of payment take a processing fee. ShareGift make the whole process as simple as it could be, and I highly recommend them. Excellent!"

"The process from my perspective was very simple and straightforward so I am extremely grateful for your help."



Thank You!

Thank you for contacting ShareGift about a donation of shares. ShareGift is a registered charity (registered charity number 1052686) which accepts donations of shares of all sizes, and works with individuals, companies and charities to release value for beneficiary charities in the UK. Thanks to the generosity of our donors, ShareGift has now given more than £70million and supported more than 4,000 charities.

What we class as a ‘large donation’

ShareGift was set up in 1996 to help solve the problems that can be caused by small shareholdings, but we do welcome donations of any size and frequently receive larger donations. For practical purposes at ShareGift, shareholdings worth over £500 are defined as ‘large’, as this is the level where generally it is possible for us to sell the shares straight away and subsequently make grants to charities.

You may wish to donate a larger holding of shares to ShareGift if:

1 A charity you support is not set up to accept share donations

Many charities, especially smaller charities, are not able to accept share donations as they do not have the expertise or facilities to deal with them.



2 You have a complicated share transaction and need help

The ShareGift team has many years of experience in share registration and settlement, and may be able to accept shares that other charities or brokers cannot assist you with.



3 You wish a number of charities to benefit from the same shareholding

If you were considering splitting a large value share donation between a number of different charities, the amount of work and the costs involved maybe off-putting. ShareGift can act upon a number of charity suggestions and benefits from free stockbroking services, thanks to the support of our partners.

4 You wish to remain anonymous to charities benefitting from your gift of shares to ShareGift

ShareGift does not fundraise and will only contact you in respect of the donation you wish to make. We do not send unsolicited mailings, nor do we pass on your details to beneficiary charities or any other third party.



How ShareGift handles large donations:

- Our policy is to sell donated shares as soon as we can. We do not take an investment view.
- We take no commission or fee for donating shares.
- ShareGift is cause-neutral, meaning that we do not make a judgment on the relative merits of different charities or causes. Instead, we give to the charities and causes that donors and supporters suggest to us and, from time-to-time, charities identified through our own research.
- We carry out due diligence on all the charities we support, and all grants are made in line with our grant-making policy. We are almost always able to support suggested charities, but if there is some reason why we cannot give to a charity you have suggested, we will let you know before we transfer the shares wherever possible.
- We make donations in round figures, based on a number of factors, including the value we realise shares for. We do not sell shares and pass on the exact proceeds to beneficiary charities, nor do we take any kind of commission from the value of the shares.
- As a significant proportion of donations that we receive come to us without a charity suggestion, we are normally in a position to round up the amount we donate to charities, but we cannot guarantee this.
- We designate all funds arising from the sale of donated shares to grant-making. This means that we guarantee that money we realise from donated shares will be used to make grants to beneficiary charities.
- All of the donations we make to beneficiary charities come from ShareGift. We never pass on the names of our donors to beneficiary charities or to any third party.
- If you wish to let a charity know that you have donated shares to ShareGift and suggested them for a future grant from us, you are of course welcome to do so.

- We make regular distributions to beneficiary charities on an ongoing basis. These are typically made monthly. We will normally include the charity suggestions from large donations in our next distribution following the sale of the shares, but we cannot guarantee this. Please see the notes below on splitting your suggestions between multiple charities.
- Following completion, we will send you a copy of your suggested charity's letter of acknowledgment / receipt of funds confirming the donation made by ShareGift.
- We are delighted to help but can only operate as described. Please be certain that giving to ShareGift and the way we handle donations is appropriate for your purposes. Alternatively, you can contact the charity or charities that you are interested in directly for details of their own share donation procedures.

Splitting your suggestions between multiple charities

We are always happy to receive multiple charity suggestions in respect of any donation. However, because of the considerable work involved in making grants to charities, if a donation is split in such a way that the nominal value attributed to any charity is under £500, we will no longer treat this as a large donor suggestion internally. That does not mean that we will not consider the suggested charity for a future grant; we look at all the suggestions made to us in respect of our grant-making regardless of the value, and these will continue to be under consideration until such a time that we support that charity. However, we will no longer be able to apply the priority whereby we typically make grants to suggested charities in our next round of distributions.



Tax

If you are a UK taxpayer, you can claim **income tax relief** on the value of most listed stocks and securities when you donate them to a charity. In addition, donating shares charitably gives rise to **neither a gain nor a loss for Capital Gains Tax (CGT)** purposes. This means that you will not be liable for any CGT which you might have had to pay had you decided to sell the shares instead. However, you should be aware that you cannot offset a loss against other gains if the shares you donate have gone down in value.

Please refer to the full **HMRC Guidance Notes** on giving shares to charity for full details.

You should keep a signed and dated copy of your stock transfer form or equivalent transfer instruction as evidence of your gift.

Please note that ShareGift cannot give tax advice.



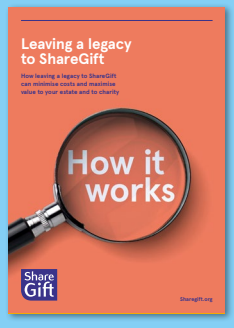
ShareGift's costs

ShareGift makes no charges to donors or charities. ShareGift meets its running costs from donations received as cash, an Investment Portfolio and donations made specifically towards our costs.

ShareGift is run by a small team, and we keep our costs to a minimum so that we can pass on as much of our income as possible to charitable causes. We benefit from generous assistance with donated services, including free broking and custodial services. However, donations to help us continue to provide our assistance for free are always gratefully received.

Estate Planning

For those interested in estate planning, ShareGift can help minimise costs and maximise the value of charitable share donations in an estate through our efficient share transfer and disposal process.



If you would like to learn more, all the information is covered in our Legacy Pack which can be **downloaded here**

Contact us

If you have any further questions about any aspect of donating your shares, please contact us.

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020 7930 3737

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