



SMARTGIVING - KKL Charity Accounts (KKL CA or SmartGiving)

CHARITY ACCOUNT - LETTER OF WISHES

DO YOU NEED HELP IN COMPLETING THIS LETTER?

If you have any questions when completing this form please contact a member of our Customer Service team on 0800 358 1191 or email paula.isaacs@smartgiving.org.uk. Telephone calls may be monitored/recorded for training/security purposes.

Please write in BLOCK CAPITALS or type.

Data Protection and Privacy. We take data protection and privacy very seriously. Our Privacy Notice at [SmartGiving](#) governs the way in which we collect, retain and use personal data. We shall ensure that we only hold personal data for as long as it is needed and that it is held securely. SmartGiving will not share your information with any outside organisation other than in accordance with the SmartGiving Agreement or when legally obliged to do so.

Privacy Notice <https://smartgiving.org.uk/page/privacy-policy>

BEFORE YOU BEGIN TO COMPLETE THIS LETTER

Please refer to clause 7 in our KKLCA Charity Account Terms and Conditions for further information on Charity Account closure.

A Letter of Wishes sent to SmartGiving will be taken, when received, as your Instructions to distribute the money in your SmartGiving Account to the charity or charities named in this Letter of Wishes, subject to the terms and conditions in your SmartGiving Agreement with KKLCA.

All information provided in this Form is confidential to KKLCA under the terms of its SmartGiving Agreement with you.

If you would like to add additional charities to your Letter of Wishes, please list the charities and clearly state the percentage of distribution per charity to an aggregate value of 100% on a separate sheet. Do not attach this sheet to the original Letter of Wishes form.

Make a photocopy of this Letter of Wishes form for your personal records before you **send the completed original to us**.

You may wish to make Additional Signatories to your SmartGiving Charity Account aware that you have completed this Letter of Wishes form. Please complete this Form to tell us how you would like the remaining balance of funds comprising your SmartGiving Charity Account to be distributed on your death.

DONOR INFORMATION

| | |
|---|--|
| SmartGiving Charity Account Number | |
| Mr Mrs Miss Ms Other | |
| Full forename(s) | |
| Surname | |
| Address | |
| Email: | |

DONOR INSTRUCTION

Upon my death, I would like KKLCA to distribute the remaining funds of my SmartGiving Charity Account as follows to the following named organisation(s), in the **specific proportions** set out below.

Number of organisations you would like to include in your Letter of Wishes: _____

| | |
|---|--|
| Charity 1 | |
| Name of Charity | |
| Address of Charity | |
| Charity Registration Number | |
| Percentage of total to be paid to Charity 1 (%) | |

| | |
|---|--|
| Charity 2 | |
| Name of Charity | |
| Address of Charity | |
| Charity Registration Number | |
| Percentage of total to be paid to Charity 2 (%) | |

| | |
|---|--|
| Charity 3 | |
| Name of Charity | |
| Address of Charity | |
| Charity Registration Number | |
| Percentage of total to be paid to Charity 3 (%) | |

Please use a separate sheet to ADD more Charities.

TOTAL PERCENTAGE MUST EQUAL 100.

DECLARATION

Where I have either

(a) not named any specific charities above, or

(b) not distributed all funds in my SmartGiving Charity Account to specific charities above,

I understand that the remaining balance of funds comprising my SmartGiving Charity Account will be transferred to and distributed at the discretion of the Directors of KKLCA under the terms and conditions of my SmartGiving Agreement.

I understand that, if (one of) the named charity(ies) above ('the Original Charity') has amalgamated with another charity, SmartGiving shall be entitled to distribute that part of the funds to the charity with which it has merged, which would otherwise have been paid to the Original Charity. Similarly, if the Original Charity no longer exists or cannot be readily identified or validated by SmartGiving, then SmartGiving shall be entitled to distribute that part of the funds to another charity identified by SmartGiving whose charitable purposes resemble those of the Original Charity, or to divide the money between the other charities in my Letter of Wishes.

I understand that where I have nominated more than one charity above, SmartGiving will round to the nearest whole pound for distribution. Where SmartGiving is unable to round a whole pound to meet the proposed distribution, SmartGiving shall be entitled to distribute to a smaller number of charities/a single charity from those set out above.

I understand that SmartGiving will take account of my wishes on the basis set out in the Terms and Conditions applicable to my SmartGiving Charity Account.

This Letter of Wishes overrides and supersedes any previous Letter of Wishes that I have signed in respect of my SmartGiving Charity Account.

Donor's Full name _____

Donor's Signature _____

Date _____

FINALLY

Make copies of this Letter of Wishes form. Please send the completed original form along with any additional pages to:

SmartGiving. Mountcliff House, 154 Brent Street, London, NW4 2BF.

ACKNOWLEDGEMENT OF RECEIPT OF YOUR LETTER OF WISHES

We will send to you by email or post a formal acknowledgement that we have received your Letter of Wishes. If you have NOT received an acknowledgement within 14 days of sending your Letter of Wishes to us, please phone or email us.

SmartGiving

T: 0800 358 1191 Website: www.smartgiving.org.uk Email: info@smartgiving.org.uk

SmartGiving is the trading name of KKL Charity Accounts (Registered Charity Number 1105998 Company registered in England No. 5118360)