

## THE "YOU GIVE, WE GIVE" SCHEME APPLICATION FORM



The "You Give, We Give" scheme offers all GIA and ISA investors the opportunity to make a positive impact on society by opting to donate a percentage of their annual portfolio gain to a charity of their choice. TAM are showing their commitment to this scheme by agreeing to match every client's donation with an equal percentage from our total annual fees. For every % of your gains you donate, TAM will donate the same % of our total annual fees.

### HOW IT WORKS

#### You Give

You decide what percentage of your annual portfolio gain to donate when opening your account <sup>1</sup>

#### We Give

TAM will donate the same percentage from our total annual fee

#### To a Charity of your Choice

Your chosen charity will receive:

- YOUR Donation
- OUR Donation
- PLUS even more through HMRC Gift Aid <sup>2</sup>

### THE BENEFITS

<b>Choice:</b>	You choose which charity receives a donation.
<b>Partnership:</b>	Increased donations through shared responsibility with TAM.
<b>Gift Aid:</b>	The Charity can benefit, where appropriate, from HMRC Gift Aid to increase that donation.
<b>Simple:</b>	Clear and convenient donation process.
<b>Tax Relief:</b>	Depending on your personal circumstances you may be able to claim tax relief on your charitable giving.
<b>Flexibility:</b>	You can readily change your charity of choice, the percentage you give or opt out completely.

### IN ACTION

Mrs. Johnson chooses to give 10% of her profit to a local charity:

Portfolio value 1st January	£100,000
Net Portfolio Value 31st December	£105,000
Annual Gain (Net)	£5,000 (or 5%) <sup>3</sup>
"You Give, We Give" 10% of gain:	
Charitable donation	£500 <sup>4</sup>

TAM will also send an additional 10% of our total fees to Mrs Johnson's chosen charity

### WE TAKE CARE OF EVERYTHING, SO YOU DON'T HAVE TO

- TAM will provide you with a letter each year to outline clearly; the calculation, the payment and confirmation of their donation.
- Where you have opted to provide your details, your chosen charity will receive confirmation of your name, address and appropriate information in relation to potential Gift Aid reclaim.
- Your financial adviser can also participate in the scheme, by simply ticking the relevant box on the account opening form.

<sup>1</sup> Maximum of 20%. <sup>2</sup> The eligibility of your nominated charity to apply for Gift Aid and the amount they will receive will vary on a case by case basis. <sup>3</sup> Illustration only, past performance is not a guide for future returns. <sup>4</sup> Higher rate tax payers may be eligible to reclaim tax against this.

## CLIENT DECLARATION

I wish to subscribe to the "You Give, We Give" scheme. I would like the following percentage of my annual portfolio gain to be donated to the charity I nominate below and authorise the passing of my details to the charity for the purposes of Gift Aid relief:

Charitable Contribution:

Please donate:  % (maximum of 20%) of my annual gain to my preferred charity

From my account:  (TAM reference number)

My preferred charity (please do not forget to complete charity number):

Charity Name	Charity Number	✓
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>

If you do not have a favourite charity in mind but would still like to participate in the scheme, you **can choose to support one of TAM's charity partners:**

Charity Name	Charity Number	Website	✓
Alzheimer's Research UK	1077089	<a href="http://www.alzheimersresearchuk.org/">www.alzheimersresearchuk.org/</a>	<input type="checkbox"/>
Bethany Christian Trust – Ending Homelessness In Scotland	SC003783	<a href="http://www.bethanychristiantrust.com/">www.bethanychristiantrust.com/</a>	<input type="checkbox"/>
Blue Cross Animal Charity	224392	<a href="http://www.bluecross.org.uk/">www.bluecross.org.uk/</a>	<input type="checkbox"/>
Bobath Scotland – Cerebral Palsy Centre	SC022695	<a href="http://www.bobathscotland.org.uk/">www.bobathscotland.org.uk/</a>	<input type="checkbox"/>
DEBRA – For People Who's Skin Doesn't Work	1084958	<a href="http://www.debra.org.uk/">www.debra.org.uk/</a>	<input type="checkbox"/>
Glasgow Children's Hospital Charity	SC007856	<a href="http://www.glasgowchildrenshospitalcharity.org/">www.glasgowchildrenshospitalcharity.org/</a>	<input type="checkbox"/>
HEART UK – The Cholesterol Charity	1003904	<a href="http://www.heartuk.org.uk/">www.heartuk.org.uk/</a>	<input type="checkbox"/>
Meningitis Now	803016	<a href="http://www.meningitisnow.org/">www.meningitisnow.org/</a>	<input type="checkbox"/>
The Archway Project – Motorcycle Education and Youth Centre	1118485	<a href="http://www.archwayproject.org/">www.archwayproject.org/</a>	<input type="checkbox"/>
Willow – Special Days For Seriously Ill Young Adults	1106746	<a href="http://www.willowfoundation.org.uk/">www.willowfoundation.org.uk/</a>	<input type="checkbox"/>
Yorkshire Air Ambulance	516898	<a href="http://www.yorkshireairambulance.org.uk/">www.yorkshireairambulance.org.uk/</a>	<input type="checkbox"/>

*I would like to subscribe to the "You Give, We Give" scheme. I have nominated my charity of choice and the percentage of my annual gain to be donated to them. I understand that this will continue annually, that I may change or cancel this instruction at any time, and that my portfolio gain will be evaluated every 31<sup>st</sup> December.*

Client signature:

Date:

## GIFT AID DECLARATION

*giftaid it*

## Are you a UK tax payer?

If so, you can use Gift Aid to make your donations go further by completing this declaration. If you Gift Aid your donation, your chosen charity/CASC can claim tax relief of 25p for every £1 you donate, at no extra cost to you! Please note that even if you are retired and on a pension you may still be a taxpayer.

Please tick the relevant boxes:

- I would like to Gift Aid my donation, all future donations and any donations I have made in the past 4 years to:
- I am a UK tax payer and understand that if I pay less Income Tax and/or Capital Gains Tax than the amount of Gift Aid claimed on all my donations for the current tax year (6 April to 5 April), it is my responsibility to pay any difference.

## My Details

Please note that in order for your chosen charity/CASC to claim Gift Aid on your donation, they need your name and address to identify you as a UK taxpayer. If you prefer to remain anonymous, your charity/CASC will not be able to increase your donation with Gift Aid. Please tick the relevant boxes and fill in your information below:

I am happy for you to send the charity/CASC my details for the purposes of Gift Aid relief

I am happy to be contacted and thanked by the charity/CASC via: phone  email  post  text

Title:	First Name:	Last Name:
Address:		
Post Code:	Date:	

## Notes

- You can cancel this Declaration at any time by notifying the charity/CASC.
- Please notify the charity/CASC if you change your name or address.
- If your circumstances change and you no longer pay enough income or capital gains tax to cover the amount claimed by the charity, please contact the charity/CASC.
- If you pay income tax at the higher or additional rate and want to receive the additional tax relief due to you, you must include all your Gift Aid donations on your Self- Assessment tax return or ask HM Revenue and Customs to adjust your tax code.
- Gift Aid is linked to basic rate tax. Basic rate tax is currently 20%, which allows charities to reclaim 25 pence on the pound.
- Higher rate taxpayers can claim back the difference between basic rate and higher rate tax.

## ADVISER CONTRIBUTION

Full name:
Company:
Signature:
Date:

**“You Give, We Give” Scheme**

Please tick if you wish to participate alongside your client and TAM in the **“You Give, We Give” scheme**. You will donate the same percentage of your ongoing fee as the Client has indicated above. This donation will be automatically deducted from your Q1 rebate fee payment and reported on the corresponding statement.