



The College Foundation

## Gift of Shares Notification

(NB The College Foundation is exempt from Capital Gains Tax so we would receive the full value of any stocks or shares you left.)

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Post Code: \_\_\_\_\_

Telephone No: \_\_\_\_\_

Email: \_\_\_\_\_

1. This is to inform you that I have authorised the transfer of £ \_\_\_\_\_ (current market value) shares in \_\_\_\_\_ (name of company) to The College Foundation.

I have, today, directed by nominee (name and address) \_\_\_\_\_ to effect the transfer.

or

2. This is to inform you that I have decided to gift £ \_\_\_\_\_ (current market value) shares in \_\_\_\_\_ (name of company) to The College Foundation.

I enclose the appropriate share certificates and duly executed Share Transfer forms.

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

### The College Foundation - Specific Fund

I would like my bequest to go towards [please indicate by ticking the appropriate box]:

The Unrestricted Fund (at the Trustees' Discretion)

The Scholarships and Bursary Fund

Other (please state): \_\_\_\_\_

Please return completed form in the FREEPOST envelope provided or send to The Development Office, FREEPOST SWC3433, Cheltenham GL53 7ZZ. Telephone No: 01242 265694, Email: dev@cheltcoll.gloucs.sch.uk

## Letter of Direction

[Suggested wording for use if your shares are held by a nominee]

To: [Nominee's name and address]:

Date:

Dear Sirs,

(Name of Company shares are held in): \_\_\_\_\_

(Number) \_\_\_\_\_ ordinary shares in the above named company ('the Shares')  
are held by you to my/our order as part of the portfolio managed by \_\_\_\_\_

(name of investment manager)

On my/our behalf, I/we have determined to transfer the Shares and accordingly, I/we direct you to transfer the Shares to The College Foundation, c/o The Development Office, Cheltenham College, Bath Road, Cheltenham, Glos, GL53 7LD.

I/we hereby certify that this instrument falls within category L in the Schedule to the Stamp Duty (Exempt Instruments) Regulations 1987.

Yours truly,

Name of Shareholder(s)