

# SHARE GIVING FORM

## FOR UK TAXPAYERS



WINCHESTER  
COLLEGE

Charity name: **WINCHESTER COLLEGE** Registered Charity No. **1139000**

Winchester College Society, Donovan's, 73 Kingsgate Street, Winchester, SO23 9PE

Telephone: **+44 (0) 1962 621 217** Email: [wincollsoc@wincoll.ac.uk](mailto:wincollsoc@wincoll.ac.uk) Web: <https://wincollsoc.org>

**WHY GIVE SHARES TO WINCHESTER COLLEGE** Share giving provides the most generous tax relief available to donors, combining relief from Income Tax (IT) and Capital Gains Tax (CGT). Gifts of shares qualify for IT relief (at your highest marginal rate) equal to the market value of the investments on the day the gift is made, including associated costs such as broker fees. Tax relief can be claimed for the year in which the gift is made. If you are thinking of making a donation to Winchester and if you are also thinking about selling shares, do consider combining the two: not only will we benefit from your gift, but you will also benefit (perhaps considerably) from tax relief.

**PLEASE READ** Upon receipt of this form, the College's stockbroker will contact your stockbroker to arrange transfer of the shares. The College's normal policy is to sell donated shares upon receipt and reinvest the proceeds in its own portfolio. If the shares are held in electronic form, please provide the details of the bank/stockbroker acting for you. If you hold shares in certificated form, then the share certificates could be forwarded to us (Winchester College Society) and listed here with your stockbroker details. In January 2018 a new 'Markets in Financial Instruments Directive' II (MiFID II) came into force. This is a regulation that increases the transparency across the European Union's financial markets and standardises the regulatory disclosures required for particular markets. This is why you are now required to give us additional information about yourself, before we can sell your shares;

### DONOR'S DETAILS

Name: \_\_\_\_\_ **PLEASE WRITE IN BLOCK CAPITALS**

Date of Birth: \_\_\_\_\_ Nationality: \_\_\_\_\_

Full Home Address: \_\_\_\_\_

Postcode: \_\_\_\_\_

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

National Insurance No: \_\_\_\_\_

### PLEASE INDICATE YOUR AREA OF SUPPORT BY TICKING A BOX BELOW

**NEW SPORTS CENTRE**  
Funding opportunities are available for elements of the new Sports Centre. Please contact Win Coll Soc for further information.

**GENERAL ENDOWMENT**  
Gifts are added to the Endowment Fund and a percentage of the income gets disbursed each year, in support of the school's primary objectives: bursary provision, maintenance of historic buildings and Quiristers.

**BURSARY ENDOWMENT**  
If you would like to support a specific House Bursary Fund, then please indicate which House:  
\_\_\_\_\_

**ANNUAL FUND**  
The Annual Fund allows donors to assist the development of Winchester College in an immediate way, since gifts to the Fund are generally spent on a range of important smaller projects that can be achieved within a twelve month period. From time to time the Annual Fund is spent on endowment objectives.

**OTHER** (please state)  
\_\_\_\_\_

We like to acknowledge all of our donors by listing them in the Wykeham Journal.

If you do not wish to have your name listed, please tick this box:

For details about Winchester College's Donations Policy, please refer to the 'Support Us' section of the website, <https://wincollsoc.org>

Please read the Privacy Statement on the reverse of this form.

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## STOCKBROKER DETAILS

Name:

PLEASE WRITE IN BLOCK CAPITALS

Full Business Address:

Postcode:

Email:

Telephone:

## SHARE DETAILS

Company Shares are in	Number of Shares	Class of Shares	Denomination*
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\*As a per share Amount, (e.g. – £1 share, 10p share)

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

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

### If you would like to take advantage of this relief, please complete the Share Donation Form.

A gift to the College of £10,000 worth of shares made by an individual who is a basic rate tax payer would reduce his or her IT by £2,000 for the year; the same gift would reduce a 40% taxpayer's IT by £4,000 and would give a £4,500 reduction for those with taxable income over £150,000.

Additionally, the donor would not have to pay any CGT on any increase in the value of the shares since they were acquired. If the shares have gone down in value, however, it is not possible to use this loss to offset any other CGT liabilities.

	tax rate:	40%	45%
Value of shares donated to Winchester College (with a chargeable gain of, say, £4,000)		£10,000	£10,000
Donor deducts the £10,000 from annual income liable to tax (assuming a 40% & 45% tax rate)	tax saving:	£4,000	£4,500
Donor saves a further 28% of CGT, which would have been paid on selling the shares (assuming capital gains in excess of the allowance)	tax saving:	£1,120	£1,120
<b>Net cost to donor</b>		<b>£4,880</b>	<b>£4,380</b>
<b>Winchester College receives</b>		<b>£10,000</b>	<b>£10,000</b>

- The College will issue the tax certificate required to claim tax relief.
- Relief is available for gifts of:
  - shares and securities listed or dealt on the UK Stock Exchange, including the Alternative Investment Market
  - shares and securities listed or dealt on recognised foreign stock exchanges
  - units in an Authorised Unit Trust (AUT)
  - shares in a UK Open-Ended Investment Company (OEIC)
  - securities on the Plus-Listed market operated by PLUS Markets plc (but not the Plus Traded or the Plus Quoted markets)
  - holdings in certain foreign collective investment schemes – generally schemes set up outside the UK that are similar to AUTs and OEICs
  - land and property in the UK
- You do not need to be resident in the UK to benefit from this relief, so long as you pay sufficient UK IT to cover the relief.

## PRIVACY STATEMENT

The personal details you supply will be used only by Winchester College and Winchester College Society and, upon appropriate application from its membership, will be used to send you information on activities, events and fundraising appeals. Winchester will not share your data with third parties except where required to do so by law. The school may engage third parties to undertake fundraising or research on its behalf. Any such companies are acting as agents of Winchester and as such the school retains full responsibility for your personal data.

Old Wykehamists can update their contact details using the profile form available at <https://wincollsoc.org>. To access the site use the login/register button at the top of the homepage.

To read the extended Privacy Statement please go to the footer of the website <https://wincollsoc.org>

To update your communication preferences:

Telephone: +44 (0) 1962 621 217

Email: [wincollsoc@wincoll.ac.uk](mailto:wincollsoc@wincoll.ac.uk)