

NORFOLK COMMUNITY FOUNDATION GIFTING PROFORMA

We require this proforma to facilitate the transfer of securities from you to the Norfolk Community Foundation. All data collected will be processed and held securely by ourselves under the principles outlined in the General Data Protection Regulation (GDPR) 2018, and in accordance with our Privacy Policy, which can be found on our website at www.barrattandcooke.co.uk.

(Please complete this proforma in BLOCK CAPITALS.)

Your personal details

Title	
Forename(s)	
Surname	

Permanent residential address	
Post code	

Date of birth	
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Nationality*	
National Insurance No.	

*If you have dual-nationality status, please list all nationalities

Verification of your identity

If the value of your gift to the Norfolk Community Foundation **exceeds £10,000** we are required to verify your identity. In such circumstances we require sight of a government-issued document with a photo, such as:

Passport | Driving Licence | Firearms Certificate or Shotgun Licence

Please tick the box to indicate whether you have enclosed an identification document:

Identity verification document attached: Yes Not applicable (gift under £10,000)

NB – in certain circumstances we might also undertake an electronic identity verification check; we might request further documentation subject to the outcome of it.

Details of securities to be gifted

I hereby authorise the transfer of the undermentioned securities, held in my name, to the Norfolk Community Foundation:

No.	Name of security

Date of gift:

Please indicate how the securities listed above are held:

I have attached certificates, or similar papers, to cover the gifts

The securities listed above are held in a nominee account with another broker
(please insert the name and address of your broker below)

Confirmation of gift

I authorise Barratt & Cooke to undertake the transfer of securities, as outlined above, to the Norfolk Community Foundation on my behalf. I understand that Barratt & Cooke are simply acting as an intermediary to facilitate the transfer of securities between myself and the Norfolk Community Foundation.

I hereby confirm that I am gifting the aforementioned securities to the Norfolk Community Foundation absolutely, as a voluntary gift inter vivos for no consideration in money or money's worth. Furthermore, I understand that following the transfer I will no longer retain control or ownership of the securities, nor will I hold any lien over them.

Signed:

Date:

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