



Giving Account Application Form

Please complete in BLOCK CAPITALS, using BLACK INK. Use a separate sheet if more space is required.

Your privacy is very important to us. For more information about how we handle and protect the information you provide us, visit stewardship.org.uk/privacy.

A. My Contact Details

Title:	Surname:*
Forename(s):*	Date of birth:* <input type="text" value="DDMMYYYY"/>
Home address:*	
Postcode:*	Date moved to this address:* <input type="text" value="MMYYYY"/>

If you have lived at this address for less than 5 years, please provide previous addresses on the continuation sheet provided.*

Email:	Telephone:
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Stewardship will communicate with you by email unless specified. To receive communications by post, please tick here.

Do you already have an account with Stewardship? Yes No If YES, what is your account number?

*Denotes mandatory fields. This information may be shared with an external agency to carry out or perform a basic identification check in the interests of protecting charitable funds.

B. Funding My Giving Account

I would like to credit my giving account by:

<input type="checkbox"/>	1. Direct Debit <i>(Please complete the Direct Debit mandate provided)</i>
	I would like to make a regular gift of: £ <input type="text" value=""/> per month into my giving account (minimum of £5.00).
	Starting on (please allow 10 working days): <input type="text" value="DDMMYYYY"/>
	Until: <input type="text" value="DDMMYYYY"/> OR <input type="checkbox"/> Until further notice
<input type="checkbox"/>	2. One-Off Payments
	I enclose a cheque (minimum £30.00) for: £ <input type="text" value=""/> Please make cheque payable to 'Stewardship'.

C. Monthly Donations Out of My Giving Account

Please make the following monthly donations out of my giving account:

Recipient Details (Name, Address, Charity Number etc.)	Amount	Send Gift Aid ¹	Start Month ²	Anonymous? ³
1.	£ <input type="text" value=""/>	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="text" value="DDMMYY"/>	<input type="checkbox"/> Yes <input type="checkbox"/> No
2.	£ <input type="text" value=""/>	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="text" value="DDMMYY"/>	<input type="checkbox"/> Yes <input type="checkbox"/> No
3.	£ <input type="text" value=""/>	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="text" value="DDMMYY"/>	<input type="checkbox"/> Yes <input type="checkbox"/> No

In addition to the above, I would like to add the following monthly amount to build a balance in my account to donate later:	£ <input type="text" value=""/>
Total of monthly giving to be transferred from my bank account:	£ <input type="text" value=""/>

Please make my **account** anonymous. Tick this box and we'll never pass on your contact details to any recipients you support.⁴

¹ If you are a UK tax payer, requesting that we send the Gift Aid amount will increase the value of the donation to your requested recipient by 25% (minus Stewardship's deduction). If you do not tick this box but complete the Gift Aid declaration in section D, the Gift Aid we reclaim on your behalf will be added to your Stewardship giving account balance (minus Stewardship's deduction).

² Please contact us if you would like to set up your regular giving at an alternative frequency to monthly.

³ If you choose to make this donation anonymously we will not pass on your contact details (name, address and email) to the recipient that you support. If you choose to share your contact details we will make this information securely available to your recipient. Please note, this may include sharing your data outside of the EU if you choose to support a recipient located outside of the EU.

⁴ Tick this box to set your account to anonymous by default. You can change this request at any time. Alternatively you can opt to make specific donations anonymous when you prefer (see point 3).

OFFICE USE ONLY:	Account number:	Staff Reference:
Account upgrade: Yes/No	Notes:	

D. My Gift Aid Declaration

giftaid it

In order to Gift Aid your donation, please tick the box below to boost your giving by 25 pence for every £1 you give

I want to Gift Aid this donation and any donations I make in the future or have made in the past 4 years to Stewardship (full name Stewardship Services (UKET) Limited). 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 in that tax year it is my responsibility to pay any difference.

For your gift to be eligible for Gift Aid, please provide your home address in SECTION A of this form. Please do not provide a business or care/of address.

E. Your Consent to Hear From Us

We'd love to keep in contact with you by email with all the latest news, free resources and advice from Stewardship. We'll never sell your personal information and will always treat it with the utmost care. You can change your consent preferences or unsubscribe at any time.

Yes please:

I'd like to receive **all** the latest news, service updates and free resources.

I'd like to receive the latest news, service updates and free resources **specifically relating to generosity and giving**.

F. Terms of Use

1. Stewardship runs a Donor Advised Fund, which is a type of charitable giving vehicle which makes it tax-effective and easy to give. As such, all funds Gifted by you into a Stewardship Giving Account are Stewardship's and become part of our charitable funds. You will have online access to your Giving Account and from there you can make requests to make Donations to Recipients. Funds that have been Gifted to Stewardship are irrevocable, outright Gifts from you to us and cannot be returned to you.
2. All Donations paid from your Giving Account to Recipients are made at the discretion of Stewardship's trustees. Stewardship reserves the right to not make a Grant to a particular Recipient. These situations are rare but as a Christian charity an example would be that we cannot give to a charity advancing another faith.
3. As Stewardship is a registered charity, neither a Giver nor any of their Close Relatives can derive any benefit from any Gifts or any income deriving from the Gifts that have been received by Stewardship.
4. Stewardship will be able to deduct from your Giving Account all costs and expenses that it incurs in connection with the operation and administration of your Giving Account. Information in relation to these costs can be found at stewardship.org.uk/fees and may be subject to change.
5. Stewardship may (at its discretion) invest any amounts Gifted into a Giving Account and awaiting distribution. Any resulting investment income (by way of capital growth or investment returns) shall belong to Stewardship and form part of its general charitable funds. For Gold Giving Accounts, Givers have the option of requesting that all or part of their balance in their Giving Account is invested in certain investment options. Any resulting investment income will belong to Stewardship and form part of its charitable funds, a portion of which will be credited to your Giving Account as per our current rates, which may be subject to change.
6. If you are eligible, to enable us to reclaim tax on your charitable giving, you will need to complete a Stewardship Gift Aid declaration. The tax reclaimed will then be added to your account.
7. To see full details of our Terms of Use, including definitions of terms used above, please refer to www.stewardship.org.uk/terms.

G. Confirmation

I confirm that I have read, understood and agree to the Terms of Use listed on this form. I also confirm that the details I have provided on this form are correct to the best of my knowledge.

Signature:

Date:

H. And Finally...

How did you hear of us?

<input type="checkbox"/>	Family or friend	<input type="checkbox"/>	Give.net	<input type="checkbox"/>	Website (other)
<input type="checkbox"/>	Church	<input type="checkbox"/>	Advert	<input type="checkbox"/>	Share magazine
<input type="checkbox"/>	Organisation	<input type="checkbox"/>	Seminar/exhibition/event	<input type="checkbox"/>	Mailing
<input type="checkbox"/>	Professional advisor	<input type="checkbox"/>	Stewardship website	<input type="checkbox"/>	Have used Stewardship in the past

Once complete, please return to: Freepost RTJE-CBKS-LAES, Stewardship, 1 Lamb's Passage, London EC1Y 8AB.

For further information or assistance, please contact our giving services team on 020 8502 8560 or email giving@stewardship.org.uk.



Continuation Sheet

Please provide us with all previous addresses in the last five year period, starting with the most recent. Please include your full name and current postcode to ensure that this continuation sheet is processed alongside your application to Stewardship.

Please complete in BLOCK CAPITALS, using BLACK INK. Use a separate sheet if more space is required.

Your privacy is very important to us. For more information about how we handle and protect the information you provide us, visit stewardship.org.uk/privacy.

A. Name of Applicant

Title:	Surname:*
Forenames:*	Current postcode:*

B. Previous Addresses

Home address:*	
From:*	To:*
<input type="text" value="M M Y Y Y Y"/>	<input type="text" value="M M Y Y Y Y"/>
Postcode:*	
Home address:*	
From:*	To:*
<input type="text" value="M M Y Y Y Y"/>	<input type="text" value="M M Y Y Y Y"/>
Postcode:*	
Home address:*	
From:*	To:*
<input type="text" value="M M Y Y Y Y"/>	<input type="text" value="M M Y Y Y Y"/>
Postcode:*	

*Denotes mandatory fields. This information may be shared with an external agency to carry out or perform a basic identification check in the interests of protecting charitable funds.

C. Further Information

Please use this area for any further information relating to your application:

Please attach the continuation sheet to your application form and return to:
Freepost RTJE-CBKS-LAES, Stewardship, Unit A, 1 Lamb's Passage, London EC1Y 8AB.
 For further information or assistance, please contact us on 020 8502 8560 or email giving@stewardship.org.uk.

OFFICE USE ONLY:	Account number :	ID check reference:
ID check: pass/fail	Staff reference:	Account upgrade: Yes/No
Notes:		



Stewardship Account Fees: Giving Account

Giving account fees effective as of 1 October 2012.

Current and updated fees are available at www.stewardship.org.uk/fees.

Stewardship Fees: For Gifts Into Your Account				
Gift Type	Our Fee	Our Minimum Fee Per Gift	Our Maximum Fee Per Gift	Our Maximum Fee Per Annum
Gift Aid	3%	£5 (fee applies to gifts by cheque only)	£400	£1,300
Non Gift Aid	2%			
Payroll Giving	2.5%	N/A		

Minimum Gift Amounts		
Gift Type	Transaction Type	Minimum Gift
Regular	Direct Debit	£5
One-off	Online and Direct Debit	£5
	Cheque	£30

Important Notes

1. Stewardship's "fees" are actually a 'membership retention' from the funds in your account which are then applied to our general purpose funds (does not apply to Payroll Giving accounts). Part of this is used to fund administration, with the remainder contributing to the costs of servicing your membership with us.
2. Minimum and maximum fees will apply to the total gifts into an account regardless of how these funds are invested.
3. Where appropriate, fees are subject to VAT at the current applicable rate.
4. Fees may be reviewed from time to time and are subject to change.
5. Stewardship will rebate any fees over £1,300 in a calendar year.
6. We may charge additional fees where we incur extra costs for processing unusual or exceptional transactions such as payments to overseas charities.



Instruction to your bank or building society to pay by Direct Debit

Please complete in BLOCK CAPITALS, using BLACK INK.

Name and full postal address of your bank or building society

Bank/Building Society:
Address:
Postcode:

Name(s) of account holder(s):

Bank/building society number:

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Branch sort code:

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Banks and Building Societies may not accept Direct Debit Instructions for some types of account

Instruction to your bank or building society
Please pay **Stewardship** (Stewardship services (UKET) Limited) Direct Debits from the account detailed in this instruction subject to the safeguards assured by the Direct Debit Guarantee. I understand that this instruction may remain with **Stewardship** and, if so, details will be passed electronically to my bank/building society

Signature(s):

Print name(s):



Service user number:

9	8	2	1	1	7
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Reference number (Office use only):

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Stewardship, 1 Lamb's Passage,
London EC1Y 8AB

Date:

FOR STEWARDSHIP OFFICIAL USE ONLY.

This is not part of the instruction to your bank. Please fill in as much as possible.

Your Stewardship account no. (if known):

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Your postcode:

ONCE COMPLETED PLEASE RETURN TO:

STEWARDSHIP, 1 LAMB'S PASSAGE, LONDON EC1Y 8AB

DO NOT SEND TO YOUR BANK/BUILDING SOCIETY

This Guarantee should be detached and retained by the payer

The Direct Debit Guarantee

- This Guarantee is offered by all banks and building societies that accept instructions to pay Direct Debits
- If there are any changes to the amount, date or frequency of your Direct Debit, Stewardship will notify you 5 working days in advance of your account being debited or as otherwise agreed. If you request Stewardship to collect a payment, confirmation of the amount and date will be given to you at the time of the request
- If an error is made in the payment of your Direct Debit by Stewardship or your bank or building society you are entitled to a full and immediate refund of the amount paid from your bank or building society
- If you receive a refund you are not entitled to, you must pay it back when Stewardship asks you to
- You can cancel a Direct Debit at any time by simply contacting your bank or building society. Written confirmation may be required. Please also notify us.

