

## OUR MISSION

**“Helping you to give in the most tax efficient way to support charitable causes and to make a lasting difference to those who need it most.”**



### **WHY CHARITIES TRUST CAN HELP:**

- Providing innovative and easy solutions to enable employers and employees to give tax efficiently
- Services and account management regarded as the best in the sector
- Over 20 years of experience in making giving simpler for the employer and employee
- Charities Trust has the most competitive administration charges in the sector
- Experience in managing the largest Payroll Giving scheme in the UK
- Our ability to create bespoke solutions to engage with a greater audience
- Our reputation is second to none – Charities recommend Charities Trust as the most proactive Payroll Giving agency
- With the management and administration of annual appeals
- Custom built secure online donation and fundraising web services
- Ensuring charities receive more using Charities Trust services
- Facilitate donations to overseas charities
- With private trust account management

**Charities Trust** already administers over **£20million** per year on behalf of charities.

*“Together we can have an even greater impact on increasing donations to charities.”* CHARITIES TRUST

# PAYROLL GIVING

**Payroll Giving** is a scheme that allows employees to donate tax effectively to registered UK charities and recognised good causes. These donations provide regular unrestricted funds which vitally assist charities to make a lasting difference.

## WHY CHOOSE PAYROLL GIVING WITH CHARITIES TRUST?

- **Payroll Giving** is easy and inexpensive to run
- Bespoke innovative promotion to support **Payroll Giving** growth
- Flat rate administration charge – **25p** per donor, per month
- Charities Trust can provide bespoke management reports to assist with your CSR strategies and reporting
- It's the best way for all tax payers to give, especially higher rate tax payers
- Can boost the funds for your chosen charity of the year and leave them with a lasting legacy when the relationship ends
- It's the easiest way for an individual to support more than one charity
- Your employees choose the charities or good causes they wish to support
- It shows that your company cares about staff and their communities – this aids staff recruitment and retention of the best people

| Charities Trust admin charges per donor per month |               |               |           |                  | Typical charges by other agencies |  |
|---|---------------|---------------|-----------|------------------|-----------------------------------|--|
| Pledge  | 20% Tax Payer | 40% Tax Payer | Admin 25p | Charity receives | Admin 4%                          | Charity receives less and admin higher |
| £10.00  | £8.00         | £6.00         | 25p       | £9.75            | 40p                               | £9.60                                  |
| £50.00  | £40.00        | £30.00        | 25p       | £49.75           | £2.00                             | £48.00                                 |
| £100.00   | £80.00        | £60.00        | 25p       | £99.75           | £4.00                             | £57.60                                 |

If your company pays the **Payroll Giving** administration charge on behalf of employees, using Charities Trust can drastically reduce this cost as other agencies may charge a percentage.



# FREEDOM ACCOUNT

The Charities Trust **Freedom Account** is a personal charity account for people who want flexibility in giving to charity.

## THE FREEDOM ACCOUNT PROVIDES:

- Freedom to donate to any UK charity or recognised good cause including places of worship, PTA's, etc
- Online account management enabling you to make donations, check balance, order new charity cheque book and set up regular monthly donations
- Easy way to make one off donations to charity appeals
- Free **Freedom Account** charity cheque book – option to have pre-printed name and address within charity cheque book
- Account can be funded by Payroll Giving donations, standing order, cheque deposits, bank transfers and credit/debit cards – all tax effectively
- All available Gift Aid is claimed by Charities Trust and added to the account
- Provision of quarterly statements via email or post
- Enables charitable gifts to be kept separate from personal money, and helps to budget for charitable giving
- Traceability for tax reviews and self assessment processes
- Low charges – most donations into the account are only 25p; donations out of the account are free

The minimum donation to open a **Freedom Account** is **£10.00**, and the account provides an individual maximum flexibility when giving to charities and good causes.



# THE XTRA FACTOR

Giving employees the opportunity to sign up to **The Xtra Factor** could raise thousands more in tax effective donations!

Charities Trust is the only Payroll Giving Agency to allow employees the opportunity to increase their donation automatically year on year.



Giving Payroll Giving – **The Xtra Factor** allows Payroll Giving donations to keep up with the cost of living, ensuring the donation value to the charity does not diminish over time.

## THIS UNIQUE CHARITIES TRUST INNOVATION PROVIDES:

- Automatic uplift
- Opt in or opt out facility
- Reports produced by Charities Trust and forwarded to the payroll department for action, so minimal work is required by employer
- Percentage increase agreed in advance each year
- Timing to fit in with employer's requirements

*“We’re delighted to be the first company to implement The Xtra Factor. Payroll Giving is hugely popular in our organisation with employees regularly giving through their payroll to their favourite charitable causes.”*

*The Xtra Factor now gives employees the opportunity to increase their donations by a small percentage each year, and with Charities Trust producing the report for our Payroll Dept, it’s easy and simple and importantly ensures charitable donations keep up with the cost of living.”*

LORNA LIGGETT, COMMUNITY AFFAIRS MANAGER, HOME RETAIL GROUP

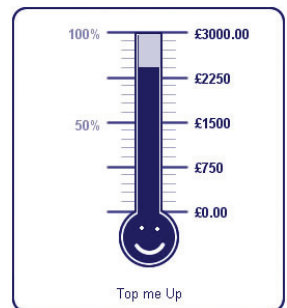


# SPONSOR-ME.ORG

Dedicated supporters of charity do the fundraising – **Charities Trust will do the administration.**

## SPONSOR-ME.ORG:

- Individual or team is provided with their own web page to display event and charity or good cause they are supporting
- Personalised URL, e.g. [www.sponsor-me.org/fredsmarathon](http://www.sponsor-me.org/fredsmarathon)
- Sponsor-meter is created for each event, which monitors and displays the amount raised and a countdown to the event
- Option to choose up to five charities per event and place charity web addresses and logos on the personalised page
- Facility to add words about the event and charity as well as upload photos, corporate logos and include hyperlinks
- Option for sponsors to donate via credit or debit card and write a supportive message or remain anonymous
- Personalised sponsorship form for offline donations
- Bank Deposit book to allow cash/cheque donations to be paid direct to **Sponsor-me.org** personal fundraising account. All available Gift Aid is claimed by Charities Trust and added to the total
- Low charges (4% inclusive of card processing fees) means that more of the fund raising total reaches the charities.
- On completion of the fundraising event, Charities Trust sends the money direct to the charity or provides a cheque for the fundraiser to present to the charity



# CORPORATE FUNDRAISING ACCOUNT

The **Corporate Fundraising Account** provides an external financial management of staff fundraising activities for charity. This service is cost effective and will save your company time and potentially money. The **Corporate Fundraising Account** can also be adapted to meet match funding criteria.

## EACH TEAM OR INDIVIDUAL FUNDRAISER RECEIVES:

- A secure online fundraising page
- Sponsorship forms, along with Gift Aid tool kit to educate fundraisers on how to make donations tax effective for the charity
- Paying-in slips or bank book to deposit funds raised and sponsorship forms

## CORPORATE FUNDRAISING ACCOUNT ENSURES:

- Reports to ensure full tracking of monies raised
- A service that keeps fundraising monies separate from business accounts
- A professional, named account manager
- All eligible donations via paper or online solutions are tax effective via Gift Aid
- Secure online fundraising page for team of employees or individuals within the business

Business needs vary greatly and the **Corporate Fundraising Account** can be tailored to meet your company's bespoke needs. Where requirements need changes to our systems, we may ask for your financial support to fulfil this bespoke request.

*“Charities Trust manage the match funding and account processes which makes it secure and accountable for our people, Charities Trust systems are flexible and make their system work for us rather than bringing a one size fits all approach, all in all a fantastic relationship with Royal Mail and one that we would not change for a second.”*



**Royal Mail**

ADAM CROZIER, CHIEF EXECUTIVE, ROYAL MAIL GROUP

# CORPORATE CHARITY ACCOUNT

This account is for companies who want to **distribute company donations**. Funds raised from suppliers, associates and employees as well as your corporate donations can be held in the account. The account will save your company time, resource and manpower.

## THE CORPORATE CHARITY ACCOUNT:

- Keeps money separate from business accounts and profits, also prevents cash being onsite and avoids security implications
- All administration is carried out on your behalf, with management accounts provided monthly
- Company monies paid into the account are eligible for tax relief via Company Gift Aid
- Correspondence with donors and charities sent on your corporate stationery
- Match money can be held in the account and dispersed by either the Corporate Fundraising facility or simply with a Charity Cheque Book
- Criteria and level of match is agreed when opening an account, ensuring appropriate charities and eligible good causes receive the corporate match
- The administration fee is **4%** and covers all costs in administering the account
- No set up charge unless a specific criteria is required
- No dispersal charges to recipient charities via the **Corporate Charity Account**



# CHARITY CHANGE

**Charity Change** is another easy way to engage employees in charitable giving. Employees pledge to donate the “pennies” from their net pay to charity. This can be anything from **1p to 99p** every week or month and has a particular appeal to lower paid staff as there is little discernible impact on take home pay.

- All charities and recognised good causes are eligible to receive **Charity Change** donations
- The donations are held in a Charities Trust Corporate Charity Account and dispersed to charities on an agreed timetable

## CHARITIES TRUST PROVIDES:

- Assistance with the marketing of the scheme
- Gift Aid claim service
- Management reports
- Payment service

Low administration fee of 4%, charities will still receive more than the original donation, as 100% of employees are encouraged to tick Gift Aid declaration.

## WHAT COULD IT ACHIEVE?

If 1000 employees donated an average of **50p** per month this would raise a grand total for one charity of **£7680 per year** (including Gift Aid).

**So small charity change does make a huge difference!!**



## COMPANY OR MEDIA SUPPORTED CHARITY APPEALS

Your company **promotes** the charity, Charities Trust will **collate** and **administer** the monies on behalf of the charities you have selected.

### HOW DOES THIS WORK:

Many organisations promote charities that their viewers, readers and customers will support during a specified period. You select the charity or charities you wish to promote, raise the profile and encourage individuals to donate. Charities Trust can assist with all administration requirements:

- Provide a secure online donation facility
- Donations by cheque, credit or debit card and charity cheques (voucher) can be processed off-line
- All available Gift Aid is claimed by Charities Trust and added to the total
- Provide reports with running total and where applicable provide a breakdown per charity
- Liaise with charities to provide updates and if preferred be the point of contact when discussing data and donations

*“As a media organisation with major operations in print and online, The Times required an organisation that could process a steady stream of donations in different forms - newspaper coupons, online donations, credit card, cheque, cash and charity vouchers. Charities Trust provided an extremely thorough and efficient service, processing data to tight deadlines and fielding all requests sent their way.”*

SAM LISTER, ASSISTANT NEWS EDITOR, THE TIMES

THE  TIMES

## ADDITIONAL WAYS TO FUNDRAISE

Charities Trust works with many organisations who provide **additional ways to raise money for charity**. For example:

### **EVERYCLICK.COM**

**Everyclick.com** works just like any other search engine, but every time you search the web with **Everyclick** you raise money for the charity of your choice. You decide which charity you want to support, with around **200,000** to choose from. There are no sign-up fees or hidden charges. **Everyclick** has already raised hundreds of thousands of pounds for charities chosen by its users. **Everyclick** is a social enterprise that champions the power of the internet to bring about positive change – one search at a time.

### **ENVIROCHARITIES.COM**

Get cash for your old mobiles by recycling them with **envirocharities.com** and at the same time you have the opportunity to donate some or all of the phone value to your chosen charity. Most of us have one or more mobiles hidden away at home, so what you are waiting for, get cash for yourself, support your chosen charity and help the environment.

### **BUYONCEGIVETWICE.COM**

This is an exclusive, stylish charity auction site where lots previously auctioned for charity or donated items are made available to buy and raise even more funds. Lots range from small indulgent items through to fabulous one off opportunities which money (all but) cannot buy.

