

# THE PETER TRUST – GIFT AID DECLARATION

Please **PRINT** your first name(s) and surname below: *(Please delete as appropriate)*

I, **Mr/Mrs/Miss/Ms**

Of *(Please PRINT your full HOME address below – POSTCODE must be completed)*

**Postcode:**

Want the Peter Trust to treat as Gift Aid donations all qualifying gifts of money made in the past 4 years and in the future.

Date of Declaration

*Signature:*

NOTES:

- Donors **must be UK tax payers** who have paid enough Income or Capital Gains Tax to cover all their charitable donations given under Gift Aid in any one tax year. Donors must understand that other taxes such as VAT and Council Tax do not qualify.
- This declaration will enable the Trust to reclaim 25p of tax for every £1 given and will remain valid until cancelled.
- Please inform the **Peter Trust** if: you change your name or address; or you no longer pay sufficient tax on your income and/or capital gains tax; or you wish to cancel this declaration.

**This certificate will be used to complete HMRC returns.**

**It will be held by the Trust to provide information for statutory/audit purposes and to keep you informed.**

More information can be obtained from John Barnes, Gift Aid Administrator,  
The Peter Trust (Regd Charity No 1080159) Tel: 0113 228 7616. email> petertrust00@gmail.com

## **GIFT AID DECLARATIONS**

### **WHAT IS A GIFT AID DECLARATION (GAD)?**

"Gift Aid" is the scheme used by charities and donors to reclaim tax on charitable donations.

### **WHAT DOES THIS MEAN TO ME?**

It means that if you are a UK tax-payer, the Peter Trust can reclaim tax on all your recorded donations, which increases the income of the Trust by 20% (current tax rate).

This means that for every £1 you give the Trust can claim back an extra 25p (gross) – this is worked out as: £1/80\*20 = £0.25.

If you pay tax at the higher rate or additional rate and want to receive the additional tax relief due to you, you must include all your Gift Aid Donations on your Self-Assessment tax return or ask HMRC to adjust your tax code.

### **HOW DOES IT WORK?**

You need to complete the GAD overleaf for the Peter Trust for any donation(s) you have or will be making. The Trust can then reclaim the tax back on your donation(s). If the donation(s) are not recorded they cannot be reclaimed against. The donation(s) can be given either by designated envelope, cheque or bankers order. The GAD will cover all donations recorded by the Trust.

### **HOW MUCH DOES IT COST ME TO GIFT AID MY DONATIONS?**

There is no extra cost to you. The tax is an extra bonus for the Trust on your contributions – as shown overleaf by completing a GAD you are increasing your donation automatically.

### **WHAT IF I STOP PAYING TAX?**

Inform the Treasurer of the *Peter Trust* to cancel your GAD. If the Trust makes a claim on money recorded but you have not paid sufficient tax, you may receive a bill directly from the HMRC. If you start paying tax at a future date, simply complete a new GAD.

### **WHO CAN COMPLETE A GIFT AID DECLARATION?**

Any UK tax-paying individual donors who has paid enough Income or Capital Gains Tax to cover all their charitable donations given under Gift Aid in any one tax year. Donors must understand that other taxes such as VAT and Council Tax do not qualify.

**Joint name Declarations, will be entered as 2 Declarations with separate reference details and donors will be treated as 2 tax-paying individuals – any donations received will be split 50/50.**

**Data Protection** Your personal details provided on this Declaration will be securely stored and used by the Peter Trust only for the purposes of making a Gift Aid claim. They are shared with HM Revenue and Customs under a legal obligation. They will not otherwise be disclosed.

# BANK MANDATE IN FAVOUR OF THE *PETER TRUST*

PLEASE COMPLETE THE SHADED AREAS

STANDING ORDER MANDATE										
To: The Manager, of your bank)										(Name
Address of your bank:										
Post Code										
Please pay: HSBC						Branch: Otley				
Sort Code: 40-39-21			Beneficiary's A/c No. 713-893-00							
Beneficiary's Name: The Peter Trust										
Ref. for Statement:										
The sum of:(in words)									£	
Date of first payment										
And, thereafter on the										
Payable: Monthly/Quarterly/Annually										
Until further notice or date of last payment to be:										
Name of Account to be debited:										
Sort Code	-	-	A/c No							
Special Instructions										
Signature:						Date:				