

How/when do my donations qualify for Gift Aid?

For individuals, the Gift Aid rules require the completion of a Gift Aid declaration. This provides us with the minimum information required for us to be able to claim Gift Aid on a donation.

Gift Aid applies only to 'gifts'. That means we cannot claim Gift Aid on fundraising activities where people have been charged an entry fee or have entered a competition. This also extends to activities where the donor can't be traced (such as giving to collections).

To ensure that Princess Alice Hospice's Gift Aid claim is valid, meaning we can claim the money back, tick the box confirming you are a UK taxpayer, print and sign your name, date the form and return it to us.

You must understand that if you pay less Income tax and/or Capital Gains tax than the amount of Gift Aid claimed on all your donations in that tax year, it is your responsibility to pay the difference.

Inheritance Tax, Council Tax and VAT do not qualify towards Gift Aid.

Gift Aid Declaration Forms

The Gift Aid declaration is simply a statement by an individual taxpayer that they want a charity to claim from HM Revenue and Customs the tax paid on their donation. If you are happy for Princess Alice Hospice to claim Gift Aid on the donations you have already made to us all you need to do is confirm the statement applies to you (by ticking the relevant box) and date the form.

Spouses and people living at the same address can make a joint declaration, in effect making two or more Gift Aid declarations on the same form. All donors Gift Aiding their donations must be individual taxpayers and their names need to be specified on the declaration.

You need to let us know if your address details change.

What does the Gift Aid declaration commit me to?

By signing up to the Gift Aid scheme you are enabling your favourite charity to increase the value of your donations.

For every £1 you donate to Princess Alice Hospice in a financial year (from 6 April to 5 April of the following year), you must have paid 25p in Income or Capital Gains Tax in the same financial year to qualify for Gift Aid. However if you pay less Income Tax and/or Capital Gains Tax than the amount of Gift Aid claimed on all your donations in that tax year, it will be your responsibility to pay any difference.

I am a Higher Rate Taxpayer – do different rules apply?

Princess Alice Hospice can only directly claim back at the basic rate. If you pay higher rate tax, you can claim the difference between the higher rate of tax and the basic rate of tax (currently 20 percent) on the total value of your donation. If you want to receive the additional tax relief you must include all your Gift Aid donations on your Self-Assessment (SA) tax return or ask HM Revenue and Customs to adjust your tax code. The SA Donate Scheme ceased from April 2012. This means that donors can no longer send a tax refund to a charity straight from their tax return. Donors can still donate their tax refund to any charity themselves and claim Gift Aid if the qualifying conditions have been met.

I am retired, do my donations still qualify?

You may still pay tax on a private pension plan or a savings account, or pay Capital Gains Tax if you sell property or shares. If this is the case, please complete the Gift Aid declaration.

How do I know if I pay UK income or capital gains tax?

You pay these taxes if:

- Income Tax is taken from your wages or salary before you receive your pay
- you pay tax after filling in a self-assessment form each year
- you have any taxable savings (in a Building Society, for instance), or a pension plan, or investment income
- you have paid any Capital Gains Tax, on the sale of a property or shares, for example.