



The
Historical Association

The voice for history

*Why not
Gift Aid your
Historical
Association
membership*

history.org.uk

How to fill in the forms

The Gift Aid declaration form

This is our standard Gift Aid declaration form and we'd ask you to complete this even if you have previously given us a Gift Aid declaration (the declaration needs to be confirmed every year to confirm you have/will not claim income tax relief on your annual subscription fee).

The Gift Aid Eligibility Form

This form is required by Her Majesty's Revenue & Customs to confirm that you have not claimed income tax relief on the cost of your subscription. The form goes back six years, please tick the boxes for each of the years you have not claimed income tax relief on your HA subscription.

Gift Aid Declaration

Gift Aid it

Name of Charity: The Historical Association

Example

- ☒ All membership and subscription fees that I pay in future as Gift Aid donations.

Please treat:

- ☐ All membership and subscription fees that I have paid in the past 6 years, and all future membership and subscription fees that I pay from the date of this declaration as Gift Aid donations.

OR

- ☐ All membership and subscription fees that I pay in future as Gift Aid donations.

OR

- ☐ The enclosed gift of £..... as a Gift Aid donation.

✓ Please tick the appropriate box above

You must pay an amount of Income Tax and/or Capital Gains Tax for each tax year (6 April one year to 5 April the next) that is at least equal to the amount of tax that the Charity will reclaim on your gifts (including subscription) for that tax year.

Donor's details:

Title: _____ Full Name: _____

Address: _____

Postcode _____

Daytime Telephone: _____

Signature: _____ Date: _____

Please notify the charity if you:

1. Want to cancel this declaration.
2. Change your name or home address.
3. No longer pay sufficient tax on your income and /or capital gains

Tax claimed by the Charity:

- The Charity will reclaim 28p of tax for every £1 you gave up to 5 April 2008.

- The Charity will reclaim 25p of tax for every £1 you gave on or after 6 April 2008.

- The Government will pay the charity an additional 3p on every £1 you give between 6 April 2008 and 5 April 2011. This transitional relief for the charity does not affect your personal tax position.

If you pay income tax at a higher rate, you must include all your Gift Aid donations on your Self Assessment tax return if you want to receive the additional tax relief due to you.

Gift Aid Eligibility

Name of Charity: The Historical Association

Example

| | | | |
|--|---|---|---|
| | | | |
| | | | ✓ |
| | | ✓ | |
| | ✓ | | |
| | ✓ | | |

Do you claim income tax relief on your subscription?

☐ Yes ☐ No

Was tax relief claimed on your subscription for any of the previous years (ending 30 September). Please tick all that apply, the 'Not Applicable' column should be ticked if you didn't subscribe in that year.

| | Yes | No | Not Applicable |
|---------|-----|----|----------------|
| 2 0 0 3 | | | |
| 2 0 0 4 | | | |
| 2 0 0 5 | | | |
| 2 0 0 6 | | | |
| 2 0 0 7 | | | |
| 2 0 0 8 | | | |

Will tax relief be claimed on the subscription fee you paid this year (paid during the year ending 30 September)?

| | Yes | No | Not Applicable |
|---------|-----|----|----------------|
| 2 0 0 9 | | | |

Signature: _____ Date: _____