

# GIFT AID RECORD OF ORAL DECLARATIONS

Northampton Roman Catholic Diocesan Trust -  
Reg'd No. 234091

Parish ..... Declarations recorded by .....

## TO COVER ALL DONATIONS MADE IN THE FOUR YEARS BEFORE, AND AT ANY TIME AFTER, THE DATE OF THE DECLARATION

Ask the questions at the top of columns 1, 2 and 6. In column 6, if they *already have* Envelopes or a Standing order, tick the appropriate box. If they want to *start* using Envelopes, give them a box and NOTE THE NUMBER in the small space. If no spare boxes are available, put TBA for To be Allocated. If they want to start using an S.O., give them a T/H Pack and tick the box. If they propose to make a regular or occasional payment by CHEQUE, just write "monthly cheque" or whatever somewhere clear in columns 4 or 5. You must at the end, read out to them the text on the "GDPR card" and ask them to confirm they are content with that, then tick the box.

Are you a UK Taxpayer ?	And willing for parish to reclaim tax ?	Title	First name & surname	Full address incl. postcode	Which method of Planned Giving will you be using ?		Date of decl'n	GDPR
✓	✓	Mr	John O'Brien	20 Vatican Drive, Northampton NN6 9DA	Already have Env's <input type="checkbox"/> S.O. <input type="checkbox"/>	Going to start using Env's - box no. 164 given S.O. - T/H Pack given <input type="checkbox"/>	26.5.18	✓
✓	✓	Miss	Sally Hammond	1 The Courtyard, Corby Rd, N'ton NN5 1XY	Already have Env's <input type="checkbox"/> S.O. <input checked="" type="checkbox"/>	Going to start using Env's - box no. <input type="checkbox"/> given S.O. - T/H Pack given <input type="checkbox"/>	"	✓
X		Mr	Arthur Redvers	"The Larches", Billing Rise, Northampton NN3 9TY	Already have Env's <input type="checkbox"/> S.O. <input type="checkbox"/>	Going to start using Env's - box no. <input type="checkbox"/> given S.O. - T/H Pack given <input checked="" type="checkbox"/>	"	X
					Already have Env's <input type="checkbox"/> S.O. <input type="checkbox"/>	Going to start using Env's - box no. <input type="checkbox"/> given S.O. - T/H Pack given <input type="checkbox"/>		
<p>These are examples of how to complete entries for three typical cases :</p> <p>(1) Hasn't previously done Planned Giving but is now willing to start using Envelopes; he is given Box No. 164 there and then</p> <p>(2) Is already a Planned Giver by way of a Standing Order but hadn't previously made a Gift Aid Declaration</p> <p>(3) Mr Redvers is not now a taxpayer but has taken a Pack home for his wife who is still a taxpayer. This entry is just an <i>aide-memoire</i> for us and has no legal significance. Nor does he need to have the GDPR text read out to him.</p>					Already have Env's <input type="checkbox"/> S.O. <input type="checkbox"/>	Going to start using Env's - box no. <input type="checkbox"/> given S.O. - T/H Pack given <input type="checkbox"/>		
					Already have Env's <input type="checkbox"/> S.O. <input type="checkbox"/>	Going to start using Env's - box no. <input type="checkbox"/> given S.O. - T/H Pack given <input type="checkbox"/>		
					Already have Env's <input type="checkbox"/> S.O. <input type="checkbox"/>	Going to start using Env's - box no. <input type="checkbox"/> given S.O. - T/H Pack given <input type="checkbox"/>		
					Already have Env's <input type="checkbox"/> S.O. <input type="checkbox"/>	Going to start using Env's - box no. <input type="checkbox"/> given S.O. - T/H Pack given <input type="checkbox"/>		

Each person on the above list must be handed or sent a written confirmation of their Declaration, explaining that they may withdraw it within 30 days of the confirmation and that they must be paying tax of at least the amount which can be reclaimed. This Record Sheet is not an "official" document demandable on audit but it would be prudent for it to be retained by the Parish.