

Gift Aid Update



Keeping you in touch with Gift Aid issues - for Churches using the Diocesan Gift Aid Lite Scheme

Issue 10
June 2009

HMRC Budget news

The March 2009 budget did not result in the many changes which the Charity sector was expecting. The only mention of Gift Aid was the announcement that there would be a review on Gift Aid from higher rate tax payers and whether the Charity should benefit from the higher rate of tax rather than the basic rate on these particular donations. This review should be completed by the autumn. Update to follow

Audit Programme

The Audit work for 2009 is now underway and resulting visits will be carried out throughout the year. The Compliance Manager from HMRC visited our office in May to check on the work carried out to date. He continues to be extremely pleased with the way the system is working.

Tax refunds - please remember if tax needs to be refunded to HMRC for 2008/09 money onwards, the transitional relief on the amount needs to be refunded as well.

STEWARDSHIP/GIFT AID SEMINAR

Unfortunately, I have to report that this event had to be postponed. We aim to re-arrange a date late autumn. Those who had booked a place will be advised when a new date is available.

DELAYS

Tax claims are currently taking 7 weeks for HMRC to repay.

OFFICE NEWS

June quarter (6/4/09 - 30/6/09)

As previously advised, only one offs sent in prior to the print deadline for the quarter will be dealt with this quarter. This will ensure speedier and easier administration during my expected absence, for someone else to process. Please continue to forward any further one offs with your claim and they will be processed in the September claim.

September quarter (1/7/09 - 30/9/09)

It is highly probable that this quarter will be affected as well. Can I please ask for your co-operation in submitting the one offs for inclusion in the September claim by the 15th September. Any received after this date will be dealt with in the December quarter.

Both quarter's - please can I encourage you to forward your completed Donations Due reports for both quarters as rapidly as feasible, particularly during the September quarter when the HMRC delays could mean that all claims need to be processed prior to 31st October 2009 to ensure the money is received within this calendar year.

Encouraging signs??

The last quarter's claims showed no sign of a reduction in the amount of tax claimed overall. In fact there was a marginal increase compared to the same quarter last year. Hopefully this trend will continue - keep up the good work everyone!

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