

## **Tax Back Frequently Asked Questions**

### **How does the scheme work?**

If you've given €250 or more in one or more of the last four years, then we can claim an additional 44.93% i.e. approx. 45% in tax back on your donations. So if you have one minute today, please fill in your form and help unlock vital, life-saving funds and make your donations worth 45% more.

### **How does the five year form work?**

If you've given €250 or more in the past year you can complete one form that we can use to claim tax back on your gifts for the next five years. Don't worry if your circumstances change, it's not a problem. We claim automatically, and if we're not eligible to receive any tax back, we don't. We would appreciate if you could let us know should your tax status change.

### **Does signing a five year form (CHY3 – Enduring Certificate) commit me to donate anything to The Alzheimer Society of Ireland?**

No, the five year form is not a commitment on your part to donate anything – it simply enables The Alzheimer Society of Ireland to claim tax relief if you donate €250 or more in any of the five years covered by the form.

### **Can The Alzheimer Society of Ireland claim if I'm self-assessed?**

Absolutely, as of 2013, the scheme allows us to claim tax back on your gifts, so the full value of your generosity goes towards helping people living with dementia and their families.

### **Do I need to tell you what I earn?**

No, we don't need that information. All we need is your signature and PPS number, which will be kept completely confidential.

### **Where do I find my PPS number?**

You can find your PPS number on:

- Tax documents
- Payslips
- Your employer's records

It's a seven digit number with a letter at the end.

### **How far back can you claim?**

We can claim back as far as FOUR years (so between 2017 and 2020).

**What if I give to more than one charity?**

We'll only be claiming back on the money that you've given to The Alzheimer Society of Ireland, so don't worry! Each charity can claim tax back on your generous gifts, provided you are happy to return a tax form for each, and as long as you have paid sufficient tax to cover the refunds.

**Can The Alzheimer Society of Ireland claim on money I've collected from others?**

No, we can only claim tax back on donations which come from you.

**How much do I have to give?**

To be eligible you have to give, or have given €250 or more in any given tax year, and in the last four years (between 2017 and 2020).

**I don't pay tax but my husband/wife does – can The Alzheimer Society of Ireland still claim?**

You may still be eligible, so fill out the form and we'll check for you. Please note, as a married couple, the PPS number used must belong to the person who is the taxpayer.

**What does the charity/ revenue do with my information? Will the revenue be looking into my tax affairs? / I'm not comfortable sharing my PPS number.**

The Revenue Commissioners already have your PPS number on file, so the reason we need your PPS number is so that the Revenue Commissioners can legitimise our claim. When we submit a claim, the Revenue Commissioners are only looking at the charity and will either approve or reject a claim based on whether there is sufficient tax paid against a PPSN. They do not follow-up on individuals about why they have or haven't paid tax – they are just concerned with either approving or rejecting our claim. For more info, please go to the Revenue website here.

**Can I reclaim tax that has been repaid to The Alzheimer Society of Ireland?**

No. Where The Alzheimer Society of Ireland has received a repayment of tax in respect of donations that you have made, you cannot subsequently have any part of that tax repaid to you.

**Will you share my information with anyone else?**

Your privacy is very important to The Alzheimer Society of Ireland, and we will never share your details with any other party. The only people who see this form are The Alzheimer Society of Ireland Head Office Finance Team and the Revenue Commissioners. Your form is then stored off site in a locked facility, as required by law. We work in line with all data protection regulation. If we are eligible to receive tax back, this is then provided by the Revenue Commissioners to The Alzheimer Society of Ireland.

### **My accountant deals with all my tax affairs, I'll pass it on to them**

The charity tax back scheme is actually separate to your own personal tax affairs. You need to sign it, not your accountant, as it is tax-back on the donations that you have personally made to The Alzheimer Society of Ireland. So please, if you can spare one minute, fill in the form and send it back to us today.

### **I made the donations through my company/ business**

If your donations were made through a company, then we cannot claim tax-back on them. However, if they were made by you personally, then we can, so please, fill in the form today and send back to us. It takes just one minute and the funds you unlock can save lives.

### **I don't know if I'm eligible?**

Don't worry, there are a number of ways we can claim tax back on your donation, even if you're:

- Retired
- Claiming PUP
- Not currently a taxpayer
- On maternity leave

**BUT** we can't do anything if we don't have your Taxback forms – so please make sure to complete it and send it back TODAY!