Gift Aid and pension contributions record 2025/26

Tax year 6 April 2025 to 5 April 2026. Give the amounts you actually paid. If you have nothing to list in a table, write “None” on its first line. Keep charity receipts and pension statements; send them if your accountant asks.

Your name	Unique Taxpayer Reference (UTR)	Tax year: 6 April 2025 – 5 April 2026
_____	_____	_____

1. Gift Aid donations

Date paid	Charity or community amateur sports club	Amount you paid (£)	Gift Aid declaration made? Yes / No	One-off or regular

Total amount you paid with a Gift Aid declaration (£)	Donations made after 5 April 2026 to treat as paid in 2025/26: amount and dates (optional)

List only donations of your own money. Leave out Payroll Giving, raffle or lottery tickets, and payments where you received something in return. The charity claims 25p for every £1 you give, so you need to have paid at least that much Income Tax or Capital Gains Tax in the year; tell your accountant if you may not have.

2. Personal pension contributions you paid

Pension provider and plan	Type (personal, SIPP, workplace or other)	Amount paid in the year (£)	Net or gross?	Statement enclosed?

Most personal pensions use relief at source: you pay £80 and the provider adds £20, so £80 is the net amount and £100 is the gross. Contributions taken from your pay before tax (net pay or salary sacrifice) and payments by your employer do not go in this table.

Did contributions by you and your employers to all your pensions exceed £60,000 in the year? Yes / No / Not sure	Have you taken money from a pension flexibly (more than a tax-free lump sum)? Yes / No / Not sure

Declaration

I confirm the details above are complete and correct. Signature	Date

Free template from screenmyform.com/forms