Legacy

REFERENCE LGY-2526-SAMPLE00
ISSUED 17 October 2026
TAX YEAR 2025–26

Your Giving Statement

6 April 2025 – 5 April 2026

PREPARED FOR

Jane Doe
1 Example Road
Exampletown
AA1 1AA

ABOUT THIS STATEMENT

Every payment you made through Legacy this tax year, with your Gift Aid and the figures your Self Assessment tax return asks for. The name and address are the ones on your Gift Aid declaration.

TOTAL GIVEN
£990.00
39 donations to 5 causes

GIVEN WITH GIFT AID
£950.00
The amount for box 5

GIFT AID CLAIMED
+£237.50
Claimed from HMRC for your causes

Self Assessment figures

SA100 tax return, page TR 4, Charitable giving. Box wording is HMRC's.

Box 5	**Gift Aid payments made in the year to 5 April 2026** Your Gift Aid donations made 6 April 2025 – 5 April 2026, monthly and one-off.	**£950.00**
Box 6	**Total of any one-off payments in box 5** The one-off donations included in box 5.	**£350.00**

Your Gift Aid declaration

MADE	NAME AND ADDRESS	ANSWER	COVERS
2 March 2024	Jane Doe, 1 Example Road, Exampletown, AA1 1AA	Yes	All 2025–26 donations

Your donations by cause

CAUSE	DONATIONS	GIVEN	WITH GIFT AID	GIFT AID CLAIMED
Example Ocean Trust OSCR SC000000	13	£370.00	£370.00	£92.50
Example Hospice Charity Commission 0000001	12	£300.00	£300.00	£75.00
Example Food Bank Charity Commission 0000002	12	£180.00	£180.00	£45.00
Example Children's Charity Charity Commission 0000004	1	£100.00	£100.00	£25.00
Example Community Garden	1	£40.00	*Not Eligible*	£0.00
Total	**39**	**£990.00**	**£950.00**	**£237.50**

Completed payments, by month

Each payment as it appears on your bank or card statement, with how it was shared between causes.

DATE	DESCRIPTION	METHOD	GIFT AID	AMOUNT
April 2025				**£50.00**
8 Apr	**Monthly donation · 3 causes**	**Direct Debit**		**£50.00**
	Example Hospice		Eligible	£25.00
	Example Food Bank		Eligible	£15.00
	Example Ocean Trust		Eligible	£10.00
May 2025				**£50.00**
8 May	**Monthly donation · 3 causes**	**Direct Debit**		**£50.00**
	Example Hospice		Eligible	£25.00
	Example Food Bank		Eligible	£15.00
	Example Ocean Trust		Eligible	£10.00
June 2025				**£150.00**
8 Jun	**Monthly donation · 3 causes**	**Direct Debit**		**£50.00**
	Example Hospice		Eligible	£25.00
	Example Food Bank		Eligible	£15.00
	Example Ocean Trust		Eligible	£10.00
14 Jun	**One-off donation**	**Card**		**£100.00**
	Example Children's Charity		Eligible	£100.00
July 2025				**£50.00**
8 Jul	**Monthly donation · 3 causes**	**Direct Debit**		**£50.00**
	Example Hospice		Eligible	£25.00
	Example Food Bank		Eligible	£15.00
	Example Ocean Trust		Eligible	£10.00

DATE	DESCRIPTION	METHOD	GIFT AID	AMOUNT
August 2025				**£50.00**
8 Aug	Monthly donation · 3 causes	Direct Debit		£50.00
	Example Hospice		Eligible	£25.00
	Example Food Bank		Eligible	£15.00
	Example Ocean Trust		Eligible	£10.00
September 2025				**£50.00**
8 Sept	Monthly donation · 3 causes	Direct Debit		£50.00
	Example Hospice		Eligible	£25.00
	Example Food Bank		Eligible	£15.00
	Example Ocean Trust		Eligible	£10.00
October 2025				**£50.00**
8 Oct	Monthly donation · 3 causes	Direct Debit		£50.00
	Example Hospice		Eligible	£25.00
	Example Food Bank		Eligible	£15.00
	Example Ocean Trust		Eligible	£10.00
November 2025				**£300.00**
8 Nov	Monthly donation · 3 causes	Direct Debit		£50.00
	Example Hospice		Eligible	£25.00
	Example Food Bank		Eligible	£15.00
	Example Ocean Trust		Eligible	£10.00
28 Nov	One-off donation	Card		£250.00
	Example Ocean Trust		Eligible	£250.00
December 2025				**£50.00**
8 Dec	Monthly donation · 3 causes	Direct Debit		£50.00
	Example Hospice		Eligible	£25.00
	Example Food Bank		Eligible	£15.00
	Example Ocean Trust		Eligible	£10.00
January 2026				**£50.00**
8 Jan	Monthly donation · 3 causes	Direct Debit		£50.00
	Example Hospice		Eligible	£25.00
	Example Food Bank		Eligible	£15.00
	Example Ocean Trust		Eligible	£10.00
February 2026				**£90.00**
8 Feb	Monthly donation · 3 causes	Direct Debit		£50.00
	Example Hospice		Eligible	£25.00
	Example Food Bank		Eligible	£15.00
	Example Ocean Trust		Eligible	£10.00
21 Feb	One-off donation	Card		£40.00
	Example Community Garden		*Not Eligible*	£40.00

DATE	DESCRIPTION	METHOD	GIFT AID	AMOUNT
March 2026				**£50.00**
8 Mar	**Monthly donation · 3 causes**	**Direct Debit**		**£50.00**
	Example Hospice		Eligible	£25.00
	Example Food Bank		Eligible	£15.00
	Example Ocean Trust		Eligible	£10.00

Total given, 6 April 2025 – 5 April 2026 **£990.00**

Payments not in your totals

These didn't complete, or were reversed, so they aren't counted in your totals or your Gift Aid.

DATE	DESCRIPTION	METHOD	STATUS	AMOUNT
3 Sept	One-off donation	Direct Debit	Failed	£30.00

About Gift Aid

For every £1 given under Gift Aid, the charity can claim 25p from HMRC. HMRC's condition is that the donor pays at least as much Income Tax or Capital Gains Tax in the tax year as all their charities and community amateur sports clubs claim.

What the amounts are

What you paid, including the Legacy fee and any tip you chose, which come out of each donation. Each donation is dated by the day your payment was confirmed.

Payments not in your totals

Payments still processing, and any that failed, were refunded or were disputed, are listed separately and aren't counted.

Who claims the Gift Aid

Legacy passes your donations to Charities Trust, a registered charity, which claims Gift Aid from HMRC and pays it to your causes.

About this document

This is a record of your donations through Legacy, not tax advice. HMRC's guidance is at gov.uk/donating-to-charity/gift-aid.

Questions about your donations

Visit givewithlegacy.com/support and quote LGY-2526-SAMPLE00.