

## FREQUENTLY ASKED QUESTIONS - TAX EFFICIENT GIVING

### How does Tax Efficient Giving work?

If you have donated more than €250 to Plan International and you pay tax in Ireland, you can authorise Plan International Ireland to claim the tax back on your donation to be used to support education and child protection programmes overseas. Do this by sending your completed CHY3 form to Plan International Ireland, 11 Harrington Street, Dublin 8, which we will then submit to Revenue. You cannot submit this to Revenue yourself, as it needs to come from a registered charity.

In effect, you are giving us permission to claim back tax that you have already paid to Revenue. We can't claim without your signature, so the power is entirely in your hands.

### By how much will the value of my donation increase?

Your donation will be worth an additional 44.9%. A signature turns a yearly donation of €250 into €362.25.

### Which donations qualify for Tax Efficient Giving?

If you are currently sponsoring a child, then you are likely to be eligible. If you have made a donation to the Girl's Fund or through an appeal then you are eligible. If you raised money for a challenge, or if you donated through your company, then these particular donations are not eligible. If you have received an email, or a letter from us in relation to the Tax Efficient Giving scheme, this means you're all good to go! If you're unsure, just drop us an email on [info@plan.ie](mailto:info@plan.ie) or call on 01 568 5861.

### I already signed the form before, why am I being asked to sign it again?

If you signed an enduring form and you're hearing from us again about Tax Efficient Giving, it means your previous form has expired and needs to be renewed. Keep an eye on correspondence from us to let you know the first tax year to which your new CHY form applies. It will be the year after the expiry of your previous CHY3. If unsure, just call or email to check with us.

### Where do I find my PPS number?

You will find your PPS number on all correspondence from the Revenue Commissioners or on your work pay slip. It's a seven-digit number with one (or sometimes two) letters at the end.

### Can I trust you to keep this information private?

We adhere to the highest standards of confidentiality in Plan International and ensure that all data gathered, held and processed is done so in accordance with the Data Act 2018 and GDPR. The information you provide us on the form will not be used for anything else other than the purpose it was provided for. You don't need to disclose which rate of tax you pay, or even if you self-assessed.

### Can I email you the form?

No. For the reasons outlined above, we ask you to only send the form back by post to Plan International Ireland, 11 Harrington Street, Dublin 8, Ireland. This is for your protection and security.

### **Will the tax claim effect my tax status or the tax I pay?**

Signing the form does not affect your tax status in any way.

### **I'm not a taxpayer but my spouse is – can my donations still be tax-effective?**

If you are jointly assessed as a couple either party can sign the form their own PPS number.

### **What if I'm a pensioner, or I'm not employed?**

If you have a pension, investments or any other means on which you pay either income or capital gains tax, we can claim on this amount.

### **I'm self-employed/self-assessed – don't I get the tax relief myself?**

Since 1 Jan 2013, self-assessed and PAYE taxpayers are treated the same – all tax relief goes to the charity, not the taxpayer. So, while you don't get the relief yourself, your donations to Plan International Ireland can be worth 44.9% more.

### **How much tax do I have to pay for the charity to benefit?**

The amount of tax you pay should at least equal the tax that we are going to claim in respect of your donations. E.g. if you donated €1,000 your tax paid for that year should be at least €449. If not, Revenue will not give us the full rebate.

### **What if I donate to more than one charity?**

You can send in a completed CHY3 form to every charity you have donated more than €250. We only reclaim tax on the donations you made to the Plan International Ireland. All charities can claim separately for donations you've made, €250 or above.

### **Do I need to sign this form for each year I donate to Plan International Ireland?**

Not if you sign the CHY3 form. When you sign it, you give us permission to claim for five years, starting from the year on the form. If you don't want to give us permission for 5 years, please ask for the CHY4 form which is valid for just one tax year. However, signing the CHY3 form is more effective as it lowers administration costs and will ensure your donations are being used most efficiently.

### **If I sign the CHY3 form, am I committed to donating yearly?**

No, the CHY3 form is not a commitment on your part to donate anything. We can only claim the tax back as long as you are a supporter of the Plan International Ireland and you are free to cancel the form at any time.

For further information please contact us in Plan International Ireland on 01 568 5861 or [info@plan.ie](mailto:info@plan.ie). We will be more than happy to answer any questions you may have and help in any way we can.

More information can be found on the Revenue website here

<https://www.revenue.ie/en/companies-and-charities/charities-and-sports-bodies/charitable-donation-scheme/how-does-a-donor-help-a-charity-to-claim-the-relief.aspx>