

## U3A Maghull & Lydiate U3A NEW Membership Application PART ONE

**Make cheque payable to MAGHULL AND LYDIATE U3A**

		Membership No.	
Title:	First Name:	Surname:	
Address:			
Postcode:	Phone No. <i>Home</i> :		
	<i>Mobile</i> :		
Email address:			
Emergency Contact Name:		Emergency Contact Phone No.:	

**How did you hear about us?: ..... Do you belong to another u3a and if so which? .....**

### GDPR - Data Collection

To allow Maghull & Lydiate U3A to comply with the General Data Protection Regulations (GDPR), we are required to identify the legal basis for processing an individual's information. To satisfy these requirements we have identified both Legitimate Interest (Article 6(1) (f)) and Consent (Article 6(1) (a)) as our legal bases.

For further details and an explanation of how we use Legitimate Interest when processing your information, please refer to our Data Protection Policy which can be found on the Notice Board and Website.

We also have a specific need to seek an individual's consent in the areas set out below. Please tick the boxes below to give us permission to use the information you have supplied in the following ways:

Do you agree that in the event of an emergency or safeguarding need that the u3a may make contact with your emergency contact?

I agree the u3a may make contact with my emergency contact in the case of an emergency or safeguarding need

When you consent to Gift Aid your subscription, the U3A is required to provide your details to HMRC. You will also need to complete part two of this form.

I consent to my data being shared with HMRC (HM Revenue & Customs) for Gift Aid purposes only.

Do you agree to be added to the direct mailing list to receive the Third Age Trust magazines – Third Age Matters and Sources? If so please tick the box below.

I consent to my data being shared with the distributors of the Trust Magazine.

I consent to any photograph that I am in, being used on the U3A website, newsletter or literature.

Please be advised that you can request for your data not to be used for any of these purposes at any time by contacting this U3A, either by email to [enquiries@mandlu3a.org.uk](mailto:enquiries@mandlu3a.org.uk) for the attention of our Data Protection Officer, or in person at the Coffee Morning, by completing a Data Removal Form (available from the Membership Desk).

Name: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

For u3a use only - Payment made by  cash  cheque  card

## PART TWO - GIFT AID PROVISION

### GIFT AID

**PLEASE NOTE:** IF YOU ARE A UK TAXPAYER AND AGREE TO YOUR MEMBERSHIP FEE BEING GIFT AIDED, THEN PLEASE ENSURE ALL SECTIONS OF THE FORM ARE **FULLY COMPLETED, SIGNED AND DATED.** FOR FURTHER INFORMATION REGARDING GIFT AID, PLEASE SEE BELOW.

Title:

First Name:

Surname:

Address:

Postcode:

Membership No.:

#### Gift Aid Declaration

- I am a UK taxpayer and the amount of tax I pay is at least equal to the amount to be reclaimed.
- I would like Maghull & Lydiate U3A to treat my membership fee as a Gift Aid donation.
- I would also like Maghull and Lydiate U3 to treat all future donations as Gift Aid until I notify you otherwise.

Signature:

Date:

CHANGE OF DETAILS: PLEASE NOTIFY THE MEMBERSHIP SECRETARY IF YOU CHANGE YOUR NAME, ADDRESS, TELEPHONE NUMBER, E-MAIL OR YOUR GIFT AID STATUS DURING THE COURSE OF THE YEAR. WE WILL CONTINUE TO COLLECT GIFT AID ON YOUR U3A SUBSCRIPTION ON AN ANNUAL BASIS UNLESS YOU INFORM THE U3A THAT YOUR TAX STATUS HAS CHANGED. YOU MUST INFORM US OF ANY SUBSEQUENT CHANGE OF ADDRESS SHOULD THIS HAPPEN.

#### NOTES ON GIFT AID:

##### **Are you a UK Taxpayer?**

If so, you can make your eligible membership fees go further by completing the declaration whilst completing the membership application form. Because Maghull and Lydiate U3A is a registered charity 1116576 we are able to treat your membership fee as a Gift Aid Donation. We shall be able to claim Gift Aid tax relief for every pound you donate.

##### **Can I claim Gift Aid for my spouse's membership fee?**

Each member who is a taxpayer (even if retired and drawing a pension) is entitled to Gift Aid their subscription to Maghull and Lydiate U3A as it is a charity. If you are a couple and you are both taxpayers then each of you needs to complete the Gift Aid form. However, if one of the couple is a taxpayer and the other is not we can only claim Gift Aid on the taxpayer's subscription even if he or she pays both subscription fees. This is because the HMRC view the payment of a subscription fee for a non-taxpayer by a taxpayer as a gift to that individual not to the charity.

##### **Are there restrictions to what I can Gift Aid?**

You cannot claim more Gift Aid than the total amount of income tax that you pay to the Revenue. If you Gift Aid your subscriptions or donations to a number of charities, the total tax effect may not exceed the personal tax you have paid to the Revenue.