

Local Meeting Expenses Claim Form

This form can be used for Local Meeting expenses where Local Meeting (LM) accounts have been closed and funds and donations have been transferred and subsumed into the Area Meeting Account.

Claims should be sent to the AM Treasurer/Bookkeeper by post or by email:

Jim Grigg, NETAQM Treasurer/Bookkeeper
 10, Grange Close
 Leigh on Sea
 Essex SS9 4JD

Email: jim.grigg@btinternet.com

Please see the notes overleaf.

..... **Local Meeting (name of LM)**

Name of Claimant

Nature of expense (please scan or attach invoices/receipts)	Amount claimed	LM Minute Reference

Signature of Claimant

Date

Address for cheque payment:

.....

or bank account details for bank transfer

Name of Account holder

Sort Code xx-xx-xx

Account number xxxx xxxx

Please indicate here if you wish to donate your expenses to the Area Meeting.

If this donation is eligible for Gift-Aid, please indicate here

If you have not completed a Gift-Aid declaration recently, please complete the Gift-Aid Declaration and attach to this form.

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Notes

All expenses should be accompanied by receipts or invoices as appropriate and a reference to the authorising minute from the LM.

LMs will be allocated an annual budget as recommended by the Area Meeting Treasurers' Committee at their 4th quarter meeting and confirmed by Trustees. LMs should make a minute explaining what this budget covers and copy to the AM Treasurer/Bookkeeper. Expenses not covered by this budget minute for that year will need a separate authorising minute from the LM.

Any exceptional expenses above the agreed budget level must be authorised by AM Trustees in advance. The LM should minute their request and send to AM Trustees via the AM Treasurer/Bookkeeper.

LM minutes should indicate the purpose of the expenditure and how it fulfils the charitable objects of NETAQM (see the NETAQM Finance Policy, paragraph 3,4 & 5 for guidance).

Payments to claimants will be made by bank transfer or by cheque to the person claiming as appropriate.

Gift Aid declaration

North East Thames Area Quaker Meeting



Boost your donation by 25p of Gift Aid for every £1 of your Quaker giving

Gift Aid is reclaimed by the charity from the tax you pay for the current year.

Your address and **FULL LEGAL NAME** is needed to identify you as a current UK taxpayer.

In order to Gift Aid your donation you must tick the relevant box(es) below:

I want to Gift Aid my donation of £ _____ made today, and any donations that:

I make in the future

I have made in the past 4 years

to **North East Thames Area Quaker Meeting**.

I am a UK taxpayer and understand that if I pay less Income Tax and/or Capital Gains Tax than the amount of Gift Aid claimed on all my donations in that tax year, it is my responsibility to pay any difference.

My details:

First name(s) _____

Family name/surname

Full home address

Signature _____ **Today's date** (DD/MM/YY) _____

Gift Aid notes

Please notify the Area Meeting treasurer if you:

- want to cancel this declaration
- change your name or home address
- no longer pay sufficient tax on your income and/or capital gains

If you pay Income Tax at the higher or additional rate and want to receive the additional tax relief due to you, you must include all your Gift Aid donations on your Self Assessment tax return or ask HM Revenue and Customs to adjust your tax

Note to treasurer: if the declaration is cancelled, cross through this form and keep in file.

Revised Mar 2020