



Volunteer Community Newsletter

Spring 2023

Dear Volunteers,

I'll firstly start by again extending my thanks to you for the support that you give to us through your hard work. We would not be able to do it without you.

There's no getting around it, 2023 has been a tough start for many. The ongoing cost of living crisis continues to put additional stress on people all across the UK. Being able to lift the burden of tax debt off the shoulders of those already struggling with day to day costs is now more vital than ever.

In this edition we are happy to welcome Samantha Lah, our new volunteer manager. We believe she will make a wonderful addition to the team.

You can also read more about how you change lives, as we tell the story of two estranged sisters and give you some statistics on your impact.

We've also included a poll, that will feature in each volunteer newsletter, so we can learn more about you and tailor our content to your needs. At the bottom you will find key contacts as well as our social media channels – so if you don't already follow us, please do!

Thanks again,

Valerie Boggs

CEO TaxAid and Tax Help for Older People

Working together: What we have achieved so far

They say ‘it takes a village’, and for us it takes the dedication of our committed volunteers to be able to continue meeting the needs of our beneficiaries.

We know financial stress can affect people's welfare, particularly their mental health, and influence their attitudes and how they make decisions. The help you give to our beneficiaries, both practical and emotional, can mitigate that effect by resolving or preventing problem debt in the first instance.

This is the difference you make:

- In 2021/22 TaxAid and Tax Help for Older People supported a community of nearly 500 qualified and experienced tax volunteers who helped our beneficiaries all across the UK.
- People call us for a range of reasons; in FY 2021/22, we provided support to 11,794 people.
- Thanks to the specialist skills and experience of our advisers and volunteers, we can concentrate on resolving the problem directly with HMRC, rather than through Debt Relief Orders, payment plans, or insolvency.
- In FY 2021/22, together, staff and volunteers at TaxAid and Tax Help for Older People relieved a total tax debt of £2,081,347; in the same period, £621,252 of tax refunds were generated.

Geoffrey, our Development Manager, wanted to understand what our beneficiaries said about the charities. He took a look through the feedback beneficiaries had provided and pulled out the popular words that were used. Take a look:

Tax Help Qualitative Feedback



Working together: What we have achieved so far

TaxAid Qualitative Feedback



Overwhelmingly we found that every entry was positive, with the exception of the word 'worry' which was only used to explain how beneficiaries felt before the service.

Your willingness to give so freely of your time and expertise is really appreciated. Your support of our values allows us to help so many people across the UK each year, providing access to expert tax advice that they would not otherwise be able to afford.

From all of us, thank you.

How you help: Louise's Story

Louise contacted the TaxAid helpline in July 2021. She was at her wits end and quite tearful on the call.

She had run a café with her sister as a Partnership business from 2011 to 2018. The café had closed following a massive falling out between the two sisters and neither of them had spoken to one another since 2018.

How you help: Louise's Story

Louise was calling us because she was being chased by HMRC for a debt of £4,700, which was penalties for not filing Tax Returns forms. She had suffered from depression for some time which had prevented her from dealing with this tax problem. She was booked in with our volunteer, David, for a telephone appointment and verbal consent was taken so TaxAid could speak with HMRC on the client's behalf.

David spoke with HMRC and discovered that the client's estranged sister was the nominated partner for the Partnership business and therefore would need to be included in order to resolve Louise's tax problem.

Louise summoned up the courage and contacted her sister, Helen, and found that she too was facing the same tax issue. Helen then contacted TaxAid and David was able to help both sisters sort out the Tax Return forms and do an appeal against penalties. Helen, like Louise, had also suffered from depression, which can be accepted by HMRC as a reasonable excuse to cancel penalties.

David was successful with the penalty appeal. Louise' debt of £4,700 was cancelled. Helen also had an even bigger debt of £7,400 which was cancelled following appeal. As a result of sorting out the tax problem together – along with the help of TaxAid – both sisters are no longer estranged and have started to re-connect.

Have your say!

We value your opinion, on everything, from Easter eggs to ways we can improve your volunteer experience!

Therefore, we are inviting you to cast your vote, in our new volunteer poll.

[Vote in our Poll](#)

We want to create a Volunteer Community Newsletter that is interesting and relevant to you.

If you have any suggestions or ideas for what you would like to see included in future newsletters, articles or information you may find useful, then please email kerry@taxaid.org.uk

Hello and Farewell

Welcoming Samantha Lah, our new Volunteer Team Manager

We were incredibly pleased to welcome Samantha to the team at the end of February. Samantha has written to introduce herself to you below:

My name is Samantha, and I am happy to have joined TaxAid and Tax Help for Older People, as the new Volunteer Team Manager. I wanted to take this opportunity to introduce myself and am looking forward to collaborating with you all.

A little bit about me, I've recently relocated to Canterbury with my son, dog and two unruly cats. I also have two grown up daughters. I've always wished to live near the coast, Aperol's and pizza by the sea; so when the opportunity arose, I grabbed it with both hands.

In my former role, I was the strategic lead for volunteer management and support; with over 10 years' experience in the charity sector, I'm focused on creating a positive volunteer journey.

I would describe my music taste as eclectic, appreciating Ella Fitzgerald, The Cramps, and Linkin Park equally. I do like a good horror movie too.

I'm learning so much about both charities, and I'm excited to be working with volunteers who generously lend their time, skills, and experience to provide accessible tax help.

Communications Officer

We were pleased to welcome Kerry back from her maternity leave in December. And, sad to unfortunately say goodbye to Joanna in January, who moved to a new position at an environmental charity.

Tax Advice Manager

We were sad to say goodbye to Gail Mackie, our tax advice manager, in March. She had been with us for many years and was a wonderful person to have worked with.

Though, we are equally as excited to be welcoming our new Tax Advice Manager Carrie Anne Hutchins on 22nd May.

Carrie-Anne Hutchins currently works in personal tax at EY in Bristol and has broad personal tax experience including non-residency tax issues and is a chartered tax adviser. Carrie-Anne started her career training as a Chartered Certified Accountant and therefore also has experience of self-employment, and corporation tax as well as VAT.

Finance and Infrastructure Director

In another change, sadly, after 9 years with us, Mark Tipping has moved to a new role at an environmental charity. Although, we are pleased to announce that replacing him will be Brian Chapman. You might know Brian Chapman as he has been a trustee at Tax Help for Older People and will be stepping down from this position to take on his new role with us.

Administrator

We have another new start, on Monday, 3rd April, Linda Osment has joined us as our new Administrator. Linda comes with lots of experience in administration as well as experience as a health care assistant and community support worker.



Upcoming Events

Virtual Tax Conference

This event hosted by CIOT 'OMB and Private Client: Succession Planning' will take place on Wednesday 10th May from 4pm – 7:15pm. The event's speakers will be Emma Chamberlain OBE, Rebecca Murray, and Pete Miller.

[To purchase a ticket for the event please click here](#)

London Legal Walk

The London Legal Walk is on Tuesday 13th June. This is a major fundraiser for the charities and a chance to meet other people who support us from across the profession. In 2022, our supporters raised £7,834 - it would be great to beat this figure in 2023.

If you're a volunteer in London we would love to see you join us. The walk concludes with a party on Carey Street with street food, fire jugglers and musicians. We plan to welcome all of our walking team to a special thank you drink at the end, with more details on this closer to the event.

Please contact Rose Over at fundraising@taxvol.org.uk to register to walk for TaxAid and Tax Help for Older People (through our joint Bridge the Gap campaign). If you cannot make the event then you may wish to [donate to our team here](#).

Follow us!

By following us on social media you can get more up-to-date tax news or updates on the tax charities.

Our most recent post on LinkedIn for TaxAid covers the latest update regarding paper tax returns and Self-Assessment at HMRC. HMRC has written to almost 135,000 customers to let them know that they will no longer receive paper Self-Assessment forms automatically, this is to encourage them to file online. This excludes some people, such as those who are over 70 and who don't have an agent, and visually impaired customers who receive paper returns.

[You can view the full post and update on this here](#)

How to follow us:

Follow the links below to follow us on social media. We appreciate any interaction from our volunteers, if you have shared something about the tax charities please tag us in your post so we can share it further.

TaxAid LinkedIn: [TaxAid](#)

TaxAid Twitter: [@TaxAidUK](#)

TaxAid Facebook: [TaxAidUK](#)

Tax Help LinkedIn: [Tax Help for Older People](#)

Tax Help Twitter: [@TaxHelp4](#)

Tax Help Facebook: [TaxVolunteers](#)

Useful contacts

TaxAid

Office Manager

Karen Clark

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Tax Help

Volunteer Team Manager

Samantha Lah

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Administrative Team

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Paulette Ward,

Linda Osment,

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We are interested in hearing what you think of the newsletter and how you currently use our websites and what changes we can make to improve your experience. Please send any feedback or ideas for content to kerry@taxaid.org.uk