



Autumn 2022

Dear friends

Welcome to this Autumn's instalment of the Volunteer newsletter.

Thank you for all the time you give to help our beneficiaries.

Through the pandemic we all had to work differently and as we emerge from this we are looking forward to extending the best of what we learned to better support our beneficiaries as well as making some changes so that we can improve the support we can give you.

In this edition we also look forward to 2023 when we plan to increase awareness of our service so that more people can get the help they need.

Also we hear about the amazing achievement of some of our volunteers who climbed Mt Kilimanjaro to raise funds.

Cathy Ratchford, a volunteer for Tax Help for Older People describes her experience of volunteering and finally a beneficiary explains the difference your support makes.

I am always happy to hear from you so please do get in touch with any suggestions you have at [valerie@taxaid.org.uk](mailto:valerie@taxaid.org.uk).

*From Valerie Boggs, CEO TaxAid and Tax Help for Older People*

## Helping more people at TaxAid and Tax Help for Older People

In 2023 Tax Help and TaxAid will be actively raising the profile of both charities at events across the UK. Recently we welcomed a new member of staff, Geoffrey Sautner, as Development Manager whose role across both charities is to reach out into local communities to make more people aware of our service. Geoffrey has already started work towards our goal for 2023 but we need your help if we are to ensure more people know about the support we can provide.

It is great to know that many of you place our posters in your local areas so that people in your communities know we are here to help. We want to build on this so that more people are aware of our service and the help we can provide. To do this we are creating new materials for our beneficiaries and referral agencies. We will be sharing these with you when they are available, but in the meantime please let us have the names of the resources, leaflets, booklets, fliers and posters you still have at home. Please also tell us about any current local events or those you attended pre-pandemic as some are restarting as we would like to support your attendance at these events.

Recently Ros Mountain and Brenda John attended the BBC Pensions Volunteer Visitors Conference and the feedback was excellent, Cheryl Miles the BBC Volunteer Visiting Coordinator said "Our delegates had not known about Tax Help and TaxAid, they found the leaflets helpful and Brenda and Ros so warm, friendly and approachable when asked questions. The delegates would like to know more and will be sharing the information with the BBC pensioners they visit in their local communities and would like to invite Tax Help and Tax Aid back next year." Read the full story [here](#).

And coming up our volunteers Linda Buckland and John D Whiting will be representing us at a local event in Lutterworth, Leicestershire, in October.

To help us please share with us the resources you currently have and the events that are happening in your local area by emailing [taxvol@taxvol.org.uk](mailto:taxvol@taxvol.org.uk)

## The future of volunteering at Tax Help for Older People and TaxAid

As you know we had to make some changes to the volunteering processes in the last two years, learning new ways of working to continue to support our beneficiaries despite the restrictions. This included making use of new technology to enable us to work from home when it was the only option.

As we emerge in our new reality post pandemic, we are taking the opportunity to review the volunteering processes taking the best from the changes we had to make to better support our beneficiaries in the years to come. This will ensure we are up to date with legal requirements such as GDPR and Safeguarding as well as improve our ability to report the impact of what we do.

Tax Help for Older People and TaxAid helped over 12,000 vulnerable people last year who had no one else to turn to, to help them with their tax problem and this is only possible with your support. So central to our review and changes we will make is ensuring that we are providing you with the right level of support and training at the same time as placing our beneficiaries at the heart of everything we do.

When we have completed our review we will be back in touch to let you know the outcome and what this will mean for you in your role as a volunteer.

## Our resources to support you

### Tax Help for Older People

#### Resources

**Tax Calculation Sheets 2021/22** – These have now been updated on Tax Help members pages. Don't forget you can use Tax Filer to do the same calculation, even if you do not need to submit a tax return. Just ask HO to set up your client and then enter the relevant figures and Tax Filer will do the calculation for you.

**Tax Health Check (Blue book)** - The updated version is available on the members pages of the website and can be downloaded as a pdf. If you receive a request for printed copies please forward the request and contact details to HO so that we can follow it up.

**Fast Track** – In the majority of cases you support we recommend an initial call to the HMRC Fast Track service as this will provide most if not all of the information you will need to support a case. Our beneficiaries may not be so clear on the information they should give This is much faster than writing to HMRC and the HMRC advisers on the Fast Track service are more experienced and have access to more detail than the HMRC agent services advisers.

#### Admin

**Client Advice Records** - Remember to return your Client Advice Record (CAR) no later than 30 days after receiving the case CAR. If the case is not complete within this time please return it with the updates and we can issue a new CAR. **Don't Forget** - Please let us have details of the figures and any calculations you have made as this helps us with any queries that arise later, and please attach as a pdf or word document.

**Expenses claims** – When claiming for mileage please record postcodes for home and destinations. For other expenses e.g. postage, envelopes, printing please send associated receipts. Please submit claims on a monthly basis.

### TaxAid

**"How to Guides"** - Don't forget to check the "How to Guides" on the members area of the website. These are recommended even for experienced volunteers and they reflect the impact of the pandemic and the self-employed grants from HMRC and local councils.

**Fast Track** - There have been changes to this team recently and a change to what they can do while they train new staff. Please feedback if you have any issues.

If you have lost your log in details to the Members Area please get in touch with [karen@taxaid.org.uk](mailto:karen@taxaid.org.uk)

## Update on the Kilimanjaro fundraising trek



Our group of fundraising trekkers completed their journey up Mount Kilimanjaro on Friday 23 September after seven days of hiking, returning to the UK on Monday 26 September. They experienced tropical temperatures and rainforest walking routes to begin with which then led to sheer rock faces with arctic conditions.

Other obstacles involved tackling the volcano rock of the Barranco Wall - an almost sheer rock face, where only hands, not sticks, can be used; hiking throughout the Karanga Valley with heights up to 4000m and views of Mount Meru, some experienced acute mountain (altitude) sickness (AMS) whilst trying to reach the summit of the 6,000m high mountain, despite all this they were in good spirits.

All of the small team of five reached the volcano rim on day six, with three reaching the highest peak, where it was extremely cold!

We are very proud of the team and it would be great if we could reach our fundraising target in the next few weeks. Please donate here if you can: <https://www.justgiving.com/team/KiliTax2020>

## Upcoming Events

### Menopause Webinar Series | 17 - 21 October 2022

The ATT, CIOT, ICAEW North West and Women In Tax have joined forces to raise awareness of World Menopause Day which is on 18 October. Despite affecting about half of the world's population, menopause isn't talked about as much as it should be. To encourage awareness and debate in menopause in the taxation and accountancy profession, CIOT are hosting 5 webinars across the week commencing 17 October. Find out more here: <https://www.tax.org.uk/menopause-webinar-series>

### Scotland Branch Annual Conference 2022 | University of Stirling | 4 & 5 November 2022

CIOT are pleased to welcome you back to their first in-person conference for three years. Set over two days, the conference offers the opportunity to hear from a range of quality speakers and to network with fellow tax professionals from around the country.

Prices for full attendance at the conference (including accommodation and meals) begin at £260 for CIOT/ATT students and £410 for members. An earlybird discount applies to bookings made on or before 21 October 2022, after which prices will increase. Find out more here: <https://www.tax.org.uk/scotland2022>

### TaxAid, Tax Help for Older People and CIOT Virtual Conference | 28 November, 15:00 – 18:15

Save the date, more details on speakers and topics to follow.



## **Cathy Ratchford, Tax Help for Older People Volunteer, discusses an experience with one of her clients that sticks in her mind.**

The client was an elderly gentleman whose income level was below the Personal Allowance. He had a small pension that he'd forgotten about which was being paid to him, but it started a year or so late because they didn't have his current address. As a result the initial payment was much higher than usual and tax was deducted. He had spoken to HMRC himself but was getting very frustrated as he couldn't understand how there could be a tax liability, and he was clearly very upset.

Cathy did a home visit and after looking at his paperwork saw that the initial payment included funds that 'should' have been paid in the previous tax year – had they been aware of his address. She was able to tell HMRC this and make a claim for the income to be taxed as it would have been, if it had been paid when it was actually due, which then spread the total over two tax years which meant that no tax was due. He was then refunded the tax that had been deducted.

For someone on a very low income this refund made a very big difference to him and Cathy was thrilled to have been able to sort his problem out.

Cathy says "I get a huge satisfaction from being able to help the clients and I think it is crucial that people that have no access to professional help commercially, for financial reasons, have this assistance."

## **A beneficiary explains her experience of the help she has received from a volunteer for many years**

"Initially, I contacted Tax Help to ask for help with filling in my tax return form, because I have myalgic encephalomyelitis/chronic fatigue syndrome (ME/CFS), which causes me brain fog and cognitive difficulties, especially with form filling and analytical processing. This made the whole business of tax returns very stressful, and often impossible to manage alone.

Carol was the first volunteer who came to visit me, and her kindness, understanding and efficiency dispelled my worries immediately. Carol returned each year to calculate and help with my Tax Return, and later, other volunteers gave their time and expertise.

The help given by Tax Help gives me the confidence and peace of mind of knowing that nothing has been missed, and only correct information is sent to HMRC. When queries have arisen, they have been able to liaise directly with HMRC on my behalf. This has all decreased considerably the stress of dealing with my tax affairs.

Cognitive difficulties, and brain fog in particular, are common in many chronic illnesses, including ME/CFS. The tax support that Tax Help provides can make all the difference in these cases.

So, if tax issues are causing distress or anxiety for you or anyone you know, I recommend contacting Tax Help to find out if they are able to help."

## Tax Help for Older People and TaxAid Staff Update

We have had several new starters since our last newsletter, including some returns and some completely new positions.

### **Deborah Graham-Vernon: Fundraising Manager**

Deborah is an experienced charity fundraiser who has also worked in academia, including as a researcher and editor in the history faculty at Oxford and managing a research centre in business taxation. She will be working to engage existing and new supporters in the incredible work of both charities and to demonstrate the difference that our staff and volunteers make to the lives of the people we help.

### **Geoffrey Sautner: Development Manager**

Geoffrey joins TaxAid/Tax Help for Older People with more than 15 years of experience working in the charity sector. Most recently he was working as the Development Manager for Hackney Foodbank. At the two charities Geoffrey will be working to develop referral pathways with charities, advisory bodies, local authorities, and other third sector organisations, with a view to improving our profile nationally and increasing the number of beneficiaries accessing our services.

### **Andrew Syddell: Tax Adviser and Team Leader**

An engineer by trade, he has had a variety of roles including a year running a business in Germany, as well as a number of years working in General Insurance. He most recently worked for the Institution of Engineering and Technology, a large professional membership organisation, and was involved in researching, commissioning and raising funding for new codes of practice and standards. He lives in rural West Dorset with his fiancé and dogs, and enjoys Country Sports and motorcycling.

### **Charlie Ogden-Wallis: Tax Adviser**

Charlie is an Accounting and Finance BSc graduate from the University of Bath and looks forward to combining this knowledge with his previous customer service experience. Outside of this, he is a keen sportsman playing both rugby and football as well as recently starting boxing.

### **Gail Mackie: Advice Manager (returned from Maternity Leave)**

Welcome or welcome back to the team and we look forward to working with you all shortly.

## Newsletter suggestions?

We are interested in hearing your stories and updates, please send to [joanna@taxaid.org.uk](mailto:joanna@taxaid.org.uk) for the opportunity to star in our next issue of the Volunteer newsletter.

