



November 2020

NEWSLETTER

Continuing to play our part because our friends have stood by us

Dear Friends

I hope that you are staying safe and well.

As COVID-19 continues its impact on all our lives, the Tax Charities have been able to play a vital role in supporting the most vulnerable people with their tax because you - our supporters - have stood by us and given such strong support.

In the spring and summer, the charities helped over 6,000 people claim essential government support when their livelihoods disappeared. That Coronavirus Support Service continues, adapted to meet changing circumstances. In the summer we found a real need to support the completion of tax returns and in September launched a new Tax Return campaign to help people take control of their lives by submitting returns early as we found ways of supporting many who can no longer afford paid advice due to the pandemic.

Alongside these developments, the charities have designed and are implementing a new advice model which will enable them to help significantly more people through better use of our resources and greater use of volunteers. This involves some significant changes for the people in both charities and in our IT support. Valerie Boggs describes the project on page 2.

The tax profession has come together superbly in these challenging times to support the charities assist their clients. Our recent fund-raising events have included a CIOT hosted professional update conference led by Michael Thomas from Pump Court; a seminar hosted by Freshfields on the value of purpose tests led by Jonathan Peacock QC; a live Bollywood event streamed from India; and a sponsored dry month in October (dry from alcohol rather than rain) by the two charities' chairs.

We in the tax profession have a huge opportunity here to help people affected by the COVID-19 crisis. Unemployment is set to rise quickly over the winter. But these people will still need help with their tax to be able to get back into employment - and for some, that help can only come from the tax charities. Will you organise a fund-raising event in your firm or team, or make a donation?

Thank you so much for your strong support - it has made a great difference for our clients - and is a huge morale boost for our staff and volunteers.

Stephen Banyard

Chair, TaxAid Trustees



Stephen Banyard



Facing the future

Ensuring we deliver tax advice for those who need it

We have all faced huge challenges this year professionally and personally. Livelihoods have been destroyed and families have been separated. We now face a second period of lockdown, unsure whether we will celebrate Christmas with our families and colleagues.

A few months ago I shared with you the steps we have taken at TaxAid and Tax Help to support vulnerable tax payers and pensioners struggling with Covid-19. Our Coronavirus Service enables us to draw on the skills and capacities of both charities. This gives us the flexibility and capacity to respond to beneficiaries who are struggling to access the Self-Employment Income Support Scheme or the Job Retention Scheme. We are delighted to be able to help those in need access this vital income. It is likely that we will be faced with increased need as the tax consequences of lockdown emerge over the coming year.

As we look to the future and seek ways in which we can best respond to the needs of our beneficiaries we do so in the knowledge that budgets are tight and Tax Help and TaxAid are small charities with limited capacity. To address the need despite the limitations we have developed a new operating model to continue to draw on the strengths of both charities and work effectively and efficiently. The new model is underpinned by a triage model where calls will be taken from across both charities by Tax Help. Many of the callers will be pointed to resources online, or provided with support from our volunteers and others will be able to have their issues resolved by the Tax Help team. More complex TaxAid calls requiring casework will then be passed on to the specialists at TaxAid. This triage approach with its dedicated helpline will allow both charities to work together and ensure the capacity is there to address the needs we find. The new joint roles of Operations Manager and Advice Manager will work across both charities to manage and motivate the teams and guarantee the quality of our advice and services.

The new model also requires a fresh approach to staff development and will offer clear development and career paths for both teams. The model also builds the capacity to develop our beneficiary and partner engagement programmes that will place beneficiary needs at the heart of what we do.

Robust systems underpin the model utilising tax software, Taxfiler, and further development of our Salesforce CRM system. We are very grateful to both PWC and Deloitte for their support as we have developed the systems, staff structures and financial modelling to deliver a robust new model that enables us to face the future with confidence. Their engagement, creativity and innovative mind-set has helped us build something we are truly proud of.

We face huge financial and service challenges as we seek to support the great number of vulnerable people struggling with lockdown. Our new operating model is innovative and bold in a world of great uncertainty. It gives us the tools we need to face our future challenges with greater confidence and a greater understanding of how we can help people.

We have always relied greatly on your advocacy and generosity to continue our mission. Your support this coming year will be needed as never before.

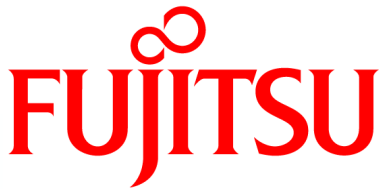
Valerie Boggs

Chief Executive

TaxAid and Tax Help for Older People



Valerie Boggs



Fujitsu: A new partnership

We are delighted to announce a new partnership for TaxAid with technology and innovation leader, Fujitsu. In addition to greatly-valued support Fujitsu is supporting TaxAid with pro bono digital strategy.

Fujitsu have already got off to a flying start by fundraising through the 10xChallenge.

Jenny Stewart, Client Engagement Director, Fujitsu said “We are delighted to partner with TaxAid and support a charity providing free, independent and confidential advice for low income taxpayers, at such a challenging time for UK citizens. Building on our contribution to the 10XChallenge, we look forward to taking part in future fundraising initiatives and supporting TaxAid with efforts to empower their clients, working with other TaxAid partners wherever possible”.

In October 2020, Fujitsu’s HMRC account team took part in the London Legal Walk 10XChallenge, to raise money for TaxAid and other advice agencies.

“The week-long, virtual initiative saw people from across the account team taking part in a variety of different activities, from 10km runs and walks to a 10XChallenge workout and ‘bake-off’.

In just over seven days, our 10km runs and walks saw us cover over 650km and cycle 1500km, accounting for a distance almost equal to travelling from London to Athens!

We were part of over 4,500 people, from different organisations, who took on the London Legal Walk 10xChallenge. According to organisers, the Challenge raised £510,000 in support of frontline free legal advice services, a sum we are delighted to contribute to.

The money raised over the course of the week will help advice agencies provide essential services at a critical time: in 2019/20, TaxAid held over 19,000 tax advice sessions and helped 5,000 people, and we’re proud to play our part in aiding the continuation of this support.

Thanks to everyone who took part in or made a donation as part of the 10XChallenge!”

To see how it was done go to: https://www.linkedin.com/posts/fujitsu-uk-and-ireland_10xchallenge-activity-6729045730830360576-Uq1D



Fujitsu UK
41,678 followers
2w •



Helping charities during challenging times is critical: see how the Fujitsu HMRC account team covered 2422km in 5 days to raise money for TaxAid and other advice agencies as part of the #10xChallenge



There's an opportunity now to help vulnerable people struggling because of the impact of coronavirus. Would you:

- make a donation,
- join the firms who are holding a fundraising event for us,
- or take part in one of our forthcoming events.

Christmas Quiz

TaxAid TAX HELP FOR OLDER PEOPLE

bridge the gap

Proudly Presents A Charity Fundraising Event
Memories of **MUKESH**
(year of Culture 2020 event)
Live Free Music Show

Mukhtar Shah
Golden Voice of Mukesh

Music : Mayur Patel (SARGAM GROUP)
Co-Singer : Anil Vasavada
Anchor : Mohsin Shaikh

Name of charity TaxAid UK
1062852 (England and Wales)
Trading as Bridge the Gap

For donations to TaxAid Tax Help for older people, press link
<http://uk.virginmoneygiving.com/VarshaPatel5>

* For further information please contact : Varsha Patel
+44 7748 636 221

Live on **YouTube Channel**
MUKHTAR SHAH
20-09-2020, Sunday
3.00 pm. (UK Time)
7.30 pm. (India Time)
M3 Events : 99786 37472



Events

Christmas Quiz

The Women in Tax network are holding a “Big Christmas Quiz” on 3rd December to raise funds for the Tax Advice Charities - all are welcome and tickets are available here <https://www.eventbrite.co.uk/e/127352307179>, with a suggested donation of £5 - or more if you like. For any queries, please contact Heather Self heather.self@blickrothenberg.com

Take-out to help out!

This November RSM.UK's tax faculty are fundraising for Bridge the Gap. Sue Brown, Head of Tax Operations, said ‘ We recognised that charities have been hard hit by the inability to raise funds in traditional ways during the corona virus pandemic so we're asking colleagues and friends to Take Out To Help Out and donate the cost of a Friday evening take-away to support the charities. Foregoing a korma or a kebab and donating to someone who really needs it’. If you would like to support this initiative here is the link: <https://uk.virginmoneygiving.com/fundraiser-display/showROFundraiserPage?pagelid=1211228>

Memories of Mukesh

Supporter, Varsha Patel, kindly organised a live stream event in honour of Bollywood legend, Mukesh. Now the days are getting darker and feel shorter, enlighten yourself with some soulful, uplifting and evergreen Bollywood music. “Memories of Mukesh” will help support TaxAid and Tax Help for Older people. You can watch the show and donate at: <https://uk.virginmoneygiving.com/VarshaPatel5>

Kilimanjaro #Tax2021 challenge

UPDATE: Despite our preparations, Covid-19 has led to our Kilimanjaro climb, planned for September 2020, being deferred to September 2021. But we remain determined to do this incredible challenge in aid of TaxAid and Tax Help! Action Challenge, who are taking us up the mountain, are confident it will proceed. Covid-safe bubbles of trekkers have already reached the peak.

Mount Kilimanjaro, with a height of nearly 6,000m, is the highest mountain in Africa and highest free-standing mountain in the world. If you'd like to join our sponsored climb, please contact tina@richestax.co.uk. Or you can sponsor the team at: <https://uk.virginmoneygiving.com/charity-web/charity/displayCharityCampaignPage.action?campaignId=9906>

#notkili challenge

Having decided in the spring to defer the Kili2020 challenge, our trekkers were concerned that their fundraising would have to go on hold, making a dent in the charities' income at a difficult time. So, the #notkili challenge took over, with several people climbing their stairs to simulate climbing Mt Kilimanjaro during lockdown. Ascending 1,200 flights of stairs was equal to the climb from the base to the summit.

Tina Riches managed the knee-killing ‘climb’, four times with a weighted backpack - so more than twice the height of Everest! Altogether almost £3,000 was raised. Not bad in lockdown!



3 minute interview - Heather Self

Could you tell us a little about yourself?

I am a tax partner with Blick Rothenburg, I do corporate tax, mainly advising a wide range of entrepreneurs. I've been in tax a long time and I am the only person I know who has been with the big four, industry, revenue, and a law firm.



Heather Self

Why are you supporting BTG?

The longer I have been in tax, the longer I have seen the need for the charities. I have known John Anderson for a very long time back in the day when 'Tax Advice for Older People' was first set up, and before that it was just recognising as a profession we spend most of our time advising companies and wealthy people, but there are a lot of people who really get stuck on tax issues, and have not got the resources to solve them. I wish the tax charities were not needed, but I think they are.

What sort of fundraising events have you been involved in for BtG?

Mainly through the 'Woman in Tax Network'. I am one of the people who helped found woman in tax. Whenever we have had a prize draw, or something, we have always used it as an opportunity to raise the profile of the charity. I have also helped organise singing carols at St Pancras. Really sorry we cannot do it this year.

What do you like best about fundraising?

I think the social side of taking part in something. I think the first time we did the London Legal Walk, we only found out about it at quite short notice. There were six or eight of us and we organised some Woman in Tax T-shirts. It was just really nice having an evening where we were able to stroll all around London, and chat, and raise some money at the same time. Doing something sociable while raising money for a good cause.

What's the worst part?

Worrying about whether anyone is going to turn up. I quite enjoy the organising side of it. Putting it all together, getting it ready. Worrying a lot if anyone is actually going to turn up on the night!

Do you have any tips for anyone else considering fundraising for BtG?

Do something which you find fun. Because then you'll enjoy it, be enthusiastic about it, and it will help generate enthusiasm for your cause. Find out more about tax charities, and what they do. I think a lot of us are not sufficiently aware of what we do. I find out what they do -follow them on Twitter. Follow them on LinkedIn, whatever, and do something fun.

And finally, don't forget the Big Quiz! (see Events page)

View from the inside: a word from one of the team

'Being fairly new to Tax Help, I was extremely excited to help with any new project. Working on the coronavirus helpline gave me the opportunity to talk to clients from different backgrounds. Although the line faced a few challenges along the way, with the information provided to us and the support from experienced tax advisors, I was able to expand my tax knowledge. I have found my overall experience on the line to be very rewarding.'

Natasha, Tax Adviser



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London SE11 4AA

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www.taxaid.org.uk 0207 803 4950



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10 Pineapple Business Park
Salway Ash, Bridport Dorset DT6 5DB

Charity no: 1102276 (England & Wales)
SC045819 (Scotland)
www.taxvol.org.uk 01308 488066