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JUNE

VOLUNTEERS' WEEK

A time to say thanks

June 2022

Dear friends

Welcome to the Volunteer newsletter June 2022, where we celebrate National Volunteers Week with you. We will be bringing you three issues each year to share updates from the charities with you, as well as inviting you to share your volunteer experiences and stories of helping our beneficiaries across the UK. Together you are our volunteer team and make a real difference to many people's lives each day.

We'd like to say a huge THANK YOU to our Volunteers for gifting your time and skills to help our beneficiaries throughout the year. Look out for our posts on social media throughout the week.

From the Staff and Trustees at Tax Help for Older People and TaxAid



Rosemarie Hegarty

Introducing Rosemarie Hegarty Volunteer and Administration Team Manager

Rosemarie Hegarty tells us about her new role as Volunteer and Administration Team Manager.

Hello, ever since my interviews in November 2021 I have been excited about joining Tax Help for Older People and TaxAid. Since February I have been welcomed in and I am learning each day more about the charities' work, our volunteers and the staff who keep all the cogs turning to ensure the beneficiaries are helped and supported with kindness and expertise.

I have come from a background of volunteer and services management with the Royal Voluntary Service and Blind Veterans UK, and prior to that, years of community development with local authorities in East and West Sussex. I am enjoying being able to take the skills I have developed over the years to Tax Help for Older People and TaxAid in reviewing our volunteering programmes, alongside getting to know our amazing volunteers.

The pandemic has taught us many new skills which enable us to help more people nationally, it is equally important to recognise the benefits gained from working in a pre-pandemic world to deliver a blended approach for the future. Alongside our Volunteer & Administration team I will also be working with our Communications team to raise the profile of the charities and be able to help more people across the UK.

Who are TaxAid and Tax Help for Older People?

The two charities are working together to support our beneficiaries with their tax queries. Some of our volunteers have worked for both charities, so know all about their origins, for those who don't here's a brief description.

TaxAid helps vulnerable people on lower incomes to understand the bits of the tax system that apply to them, pay only the right amount of tax and help them resolve crises when things go wrong. TaxAid was set up 30 years ago by tax professionals who were concerned that people on low incomes were suffering significantly because they could not afford tax advice.

After a successful pilot in 2001, Tax Help for Older People was established in 2004. Tax Help for Older People is a service that provides free, independent and expert advice specifically for older people on lower incomes.

TaxAid and Tax Help for Older People directly support and advocate for vulnerable workers and pensioners who do not have the educational or financial capital to manage their tax affairs. We are working towards a world where every vulnerable person gets the tax help they need. Our service empowers and encourages people to help themselves through information on our platforms and through our helpline, with more complex problems being addressed through our one-to-one clinics.

We also work with other advice networks and specialist charities to signpost to our service, while developing their tax knowledge through training and information. We have expanded our reach through our wonderful volunteers who have brought their expertise and years of professional training to transform the lives of thousands of vulnerable and impoverished people.

Remembering Richard Savours, Tax Help Volunteer

Richard Savours became a volunteer with Tax Help for Older People in March 2009. We learned with great sadness that Richard passed away unexpectedly in April 2022 and we send our heartfelt condolences to his family and friends.

Richard was a dedicated volunteer who helped with 325 cases over the years. Like many of our volunteers, Richard undertook home visits and surgeries before the pandemic and over the past two years was able to help with the remote support to beneficiaries through phone calls and emails. He was diligent and kind in managing our beneficiary cases and always kept the team at Pineapple HO updated. Richard went about his volunteering in a quiet practical manner, however the impact he had through helping so many vulnerable older people brought them huge relief and reassurance. We are thankful for Richards's kindness and generosity in gifting his time and skills to Tax Help for the past thirteen years.

Volunteer Success Story

Angela Williams, Tax Help for Older People Volunteer, shares an example of volunteering that didn't require specialist tax knowledge, but proved very useful for the beneficiary. The case involved sorting out tax codes, explaining tax and reassuring an 83 year old widow. She was meticulous in keeping all tax correspondence including (handwritten – do you remember those?) tax codes and explanatory booklets back to the early 1960s. She had never known what she needed to keep or could throw out and the weight, both physical and mental, was worrying her more and more. Angela went through everything and as the piles for recycling and shredding increased, she could see her shoulders physically rising and the smile of relief on her face getting bigger and bigger. It may not have been strictly sorting out the tax problem but for Angela it was so worthwhile and very satisfying to see her huge relief.

Farewell to Debbie

Tax Help for Older People Volunteer & Administration Team Member, Debbie Wedge leaves us at the end of May. We are sad to say Goodbye to Debbie who is moving on to new challenges with the local NHS after 10 years with the charity. We wish Debbie every success in her new role and know that she will be missed by our Tax Help for Older People volunteers who she has supported over the years.

Newsletter suggestions?

We'd love to hear your suggestions for the Volunteer Newsletter title, alongside any topics you'd wish to be updated on. Please send suggestions to Joanna Robertson at joanna@taxaid.org.uk by August 1st.

Upcoming Events



London and Exeter Legal Walk | Tuesday 28th and Thursday 23rd June 2022

The 18th London Legal Walk returns on Tuesday 28th June 2022. A lovely 10K walk through central London's parks and riversides. In 2021 the Bridge The Gap team, raised an amazing total of just over £10,000 for the two charities TaxAid and Tax Help for Older People. Put it in your diary, bring along your dog and join us for a great time together to raise funds for our charities.

This year, for the first time, we are also walking in the Exeter Legal Walk on Thursday 23rd June and if you live in the South West and would like to join our Tax Help staff team, please get in touch with Rose.

For more information contact rose.over@taxvol.org.uk

Kilimanjaro Trek | September 2022

Ain't no mountain high enough? Oh yes there is! After two years of delays due to Covid, our intrepid group of tax charity trekkers are set to climb Mount Kilimanjaro this autumn. They leave the UK on Thursday 15th September and plan to trek up through the tropical rain forests, across rocky outcrops and up around the snowy crater to the summit. At almost 6,000m this is the highest mountain in Africa and the highest freestanding one in the world.

The trek is virtually full; at the time of going to press there was one place left. If you are interested in joining, either this year or to go on the waiting list for this or a future event, contact Tina Riches at tina@richestax.co.uk

If you know of a firm interested in being involved by being a key sponsor of the team then also let Tina know. The team has to limit the weight they carry to the top, but could take an advertising banner or wear hats with your logo on it to the photogenic summit. All offers considered!

Support and sponsor our team here: <https://www.justgiving.com/team/KiliTax2020>

Professional Development Events | 2022

Our highly successful programme of online CPD technical events for tax practitioners continues this year. Last week CIOT kindly organised a "Private Client and OMB Technical Update.

The programme continues on Tuesday September 13th when Rebecca Benneyworth, Peter Rayney and Carl Bayley are our speakers. The programme details for this will be announced nearer the event.

Our celebrity speakers give their time and CIOT host and organise the events for us and we are grateful for their support.

Useful Information

The Volunteer & Administration Team Contacts

TaxAid

- Office Manager, Karen Clark,
karen@taxaid.org.uk

Tax Help for Older People

- Daily contact for cases will go to the Volunteer and Administration Team - Administrator, Shila Wheeler,
Bookingteam@taxvol.org.uk, 01308 487002
- CARs returned to, Administrator, Lynne Kitton, Lynne.kitton@taxvol.org.uk

Positive Feedback

I cannot stress enough how important it is to deal with people who are kind and understanding. Tax issues cause many elderly people enormous anxiety. Your staff took away that anxiety.

The organisation has helped me in a most difficult circumstance and been just so supportive.

Absolutely wonderful. My issue is taking a little while to resolve. I could not have dealt with it on my own. I have great faith in your volunteers.

I had been very worried by the letters I was receiving from the Tax Office and had no idea how to sort it. The person who guided me through this was so patient and helpful and I now have a better understanding of how to organise things.

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

