



Fundraising Pack

London Legal Walk 2022

Thank you for supporting us

The money that you raise will allow us to continue to provide our service to those who need it most.

'I am extremely grateful for the help and support I received from this organisation. I was treated with respect and sensitivity. I could not afford an accountant. This organisation is vital to older people like me. Thank you.'



A trek by supporters to the summit of Kilimanjaro raised a whopping £27,000. A massive well done and thank you to the team who persevered after their plans were delayed by the pandemic.

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‘ A massive thank you to all at TaxAid. I was caught up in a reconciliation exercise. I have always been employed and was shocked to receive a tax penalty of £600 and didn’t know where to turn. TaxAid knew exactly how to help. A huge weight has been lifted. ’

A message from our Chairs to you



Penny Hamilton
Chair, Tax Help
for Older People



Stephen Banyard
Chair, TaxAid

Thank you for requesting our Fundraising Pack. We hope that it will provide you with ideas and practical support to help you raise vital funds for TaxAid and Tax Help for Older People - through our joint fundraising campaign, **Bridge the Gap**.

We are the only charities in the UK providing advice and support for vulnerable people on low incomes with their tax affairs. Last year the charities helped about 12,000 people in the UK but we know that the cost-of-living crisis is making life harder and our helplines are receiving increasing numbers of calls for help.

People turn to us for help when they are struggling with tax problems, often on top of already stressful lives. Our beneficiaries are victims of exploitation, pension scams and have unmanageable debt. They also tell us they are struggling with bereavement or mental health problems, learning difficulties. Their life challenges are often more complex than their tax issues.

Our volunteer advisers (tax professionals giving their time and expertise) help individuals to understand their tax liabilities and resolve issues directly with HMRC.

Our help can result in the remittance or even cancellation of tax debt. In 2021/22 we relieved a total tax debt of £2,081,347 and £621,252 of tax refunds were achieved. For those on the lowest incomes, the impact of our work can be truly life changing—removing stress and sleepless nights and helping set them on a more certain path.

TaxAid and Tax Help for Older People are incredibly grateful to you for supporting our work. We ask you to please hold or take part in a fundraising event for us, or to simply make a donation so that we can continue to help people struggling with tax problems.

On behalf of everyone we help, thank you.

Many thanks,

Stephen Banyard
Chair, TaxAid UK

Penny Hamilton
Chair, Tax Help for Older People



The London Legal Walk is a fantastic annual event that raises vital funds for TaxAid and Tax Help. Walk with us and help us to exceed last year's total of £7,834.

Why your support matters

For many of the people we help, tax is not their only problem. Often, those who call our helpline have learning difficulties, literacy problems, mental health issues, or they are dealing with bereavement or extreme poverty. The work that we do can provide a lifeline to those dealing with complex and daunting tax problems.

Sophie's story

Sophie came to us with a huge tax debt, in excess of £10,000. She was suffering from severe depression and numerous other health conditions. This stemmed from a series of related misfortunes: an eviction, the loss of her business, the loss of all her records and bank statements, and a broken relationship.

The huge debt she had accumulated felt too much to cope with. The numerous demanding statements from HMRC led to her burying her head in the sand, ignoring all correspondence. Her health deteriorated and she felt trapped, with nowhere to turn.

After Sophie called TaxAid's helpline, one of our volunteers, Cathy, took on her case. Over the course of several visits, she pieced together Sophie's business accounts and then began negotiating with HMRC on Sophie's behalf.

As a result, the penalties for Sophie's business accounts for in-date years came down to zero. Additionally, an application for Special Relief for the out-of-date years was accepted. In the end, HMRC actually owed Sophie £138.

With TaxAid's help and support, Sophie is now free of tax debt. The stress and worry that had hung over her for years has also gone and she has been able to move forward with her life.

‘Staff were very helpful, I am so grateful for all the help and support they gave me. I have a disability and was very ill at the time. But with Tax Help for Older People not only was I listened to but more, they made me feel that I was a person too, someone in need of support and help. Thank you.’

Fundraising ideas

There are so many ways to raise funds for our Bridge the Gap campaign. We hope that we can inspire you and that whatever you take on you enjoy.

If you prefer for others to take on the organization, take a look at some of the many companies who arrange these including, Let's Do This, Charity Challenge and Run for Charity (and its sister sites covering sport and cycling). If you would like to get in touch about your plans, please email fundraising@taxvol.org.uk

Afternoon tea. Make it a special event with bunting as well as delicious traditional cakes and scones.

International day. Have a day celebrating the country of your choice! Tango and Malbec for Argentina Day or keep it local with haggis, roast beef, or Welsh lamb.

Dress down day. You could do this weekly or monthly to raise money.

Cocktail reception. Create and sell a unique cocktail for an event that you host.

Wine and cheese night. A great way to raise money and have fun.

A night in. Enjoy a casual night in and donate what you would typically spend on a night out.

Charity auction. You could auction off items, skills or services to raise money. This works brilliantly virtually too.

Pub quiz. Works perfectly as a virtual or an in-person event. You could even get different teams or offices to compete against one another to win and to raise the most!

Sponsored bike rides, walks or hikes. There are endless opportunities for you to take on a solo or team challenge.

Sports tournaments. Get your friends and colleagues together for a golf competition, cricket match, football or netball tournament.

Bungee jumping. Sponsoring something more extreme is a great way to fundraise and have fun in the process.

24 hour challenge. Organise a marathon board or video game, sporting or dance event, or anything else you enjoy with friends.

Give something up. Try giving up chocolates, sweets, social media, or coffee from coffee shops. Donate what you would have spent or ask friends to sponsor you.

Special celebration. If you are planning a special celebration, birthday, anniversary or wedding, why not ask for charity donations instead of presents?

Tips for success

1. Set up an online fundraising page

You can customise it and share with family and friends. Using Just Giving will make it easy for your funds to reach us.

2. The more the merrier

Ask your office, friends or family to take part! You can work towards a bigger event or challenge together.

3. Get creative with your event

Grab the attention of friends and family by making your event unique or novel in some way.

4. Matched giving

Ask your employer if they will match your charitable fundraising.

5. Share your fundraising the right way

Sharing your fundraising with the world can feel daunting, but most people really do love to give back.

- Share your personal story about the cause
- Set a good fundraising target
- Add your fundraising link to your email signature
- Text or email people who don't use social media
- Tag TaxAid and Tax Help for Older People on social media so we can share your fundraising too
- Share your training or event preparation on social media to keep people involved

On average 20% of donations come in after an event - so, make sure you follow up with an update when you have finished. And, don't forget to say thank you to everyone who supports you.

6. Don't forget Gift Aid

With gift aid, the charities receive up to 25% more money from the people who contribute to your fundraising. Read about this here: fundraisingexpert.com/gift-aid/

Helping you to fundraise

We know it can be a challenge to get people excited about tax – but the work we do is incredibly important. Here you will find information about what we do and who we help as well as answers to the questions we know you might be asked. Please feel free to use any of this content on your fundraising page or when talking to people about your fundraising event.

What we do

TaxAid and Tax Help of Older People support people in poverty with their tax problems. Anyone can face difficulty with their tax but not everyone is able to afford to pay for advice. The charities help people on lower incomes with their tax problems and tax debts.

TaxAid helps working-age people in poverty who are facing tax problems. Tax laws can be complicated even for tax professionals, so our free tax advice can be a lifeline to those who are unable to afford paid advice.

Tax Help for Older People supports people in poverty who are over 60 and facing a tax problem. Bereavement, confusion around tax laws, and pension scams can lead to complicated issues and anxiety for people who are unable to afford paid advice. We provide free, professional advice delivered with respect and understanding.


Case studies

Emma's story

Emma's learning difficulty and computer illiteracy caused her tax problems to mount, because she did not understand how to file her tax returns. When she finally got in touch with us she had paid over £4,000 in penalties. Here's her story: <https://taxaid.org.uk/emmas-story>

Tony's story

Tony has dyslexia and other physical health problems, when he came through to Tax Help for Older people he was confused that he had received a tax demand from HMRC. Here is how we helped Tony: <https://taxaid.org.uk/tonys-story>



Six women from the Farlands Valley Spartans running club ran a virtual marathon relay, running 4.37 miles each. They raised over £1,600 split between the tax charities and Age UK. We are so thankful for their hardwork.

Helping you to fundraise

Why do people in poverty have tax problems?

This might surprise you, but **almost half of all self-employed adults over 25 in the UK are earning poverty pay**. Not everyone who is self-employed is a successful entrepreneur. Many find work as cleaners, child-minders, delivery drivers or within the gig economy, and these people may still face tax problems. People can also face exploitation within salaried job roles and not realise their tax is wrong until they get a surprise fine.

Sometimes these issues arise due to a misunderstanding of tax laws, but often tax problems can escalate due to learning disabilities, mental health problems, physical health issues, or computer illiteracy. A recent report found that **half of all people in poverty in the UK are either disabled or live with someone who is disabled**. We give these people a helping hand with our tax advice and can be a real lifeline to them.

Older people can fall victim to pension scams or exploitation, which can lead to financial difficulty or tax fines. They can also face tax issues when dealing with the loss of a partner. The tax system for pensions can be difficult to understand, so we exist to provide additional support.

But, doesn't HMRC help with this?

We work closely alongside HMRC's Extra Support Team. Our beneficiaries also come to us when they need additional support after trying to resolve things with HMRC. They may be in data poverty without access to the internet or not be able to make sense of online resources because of their learning disabilities or because they aren't very good with computers. They may not understand the appeal process or even why they have received a bill, so they don't know where to start.

We offer independent, expert and confidential advice that demystifies tax which can often be a frightening and confusing challenge. We are able to offer this advice through the generosity, energy and ingenuity of the tax community who volunteer their time and expertise.

Paying in your fundraising

There are lots of different ways to pay in your fundraising. Please support both TaxAid and Tax Help for Older People by donating to our joint Bridge the Gap campaign, thank you.

- If you have set up a fundraising page on Just Giving, you don't need to do anything - your online page updates your personal fundraising automatically and sends us funds raised on a weekly basis.
- You can pay us online via our CAF donation page (<https://cafdonate.cafonline.org/18211>)
- You can pay by bank transfer – please contact fundraising@taxvol.org.uk for details.
- Alternatively, you can send a cheque, made payable to Bridge the Gap, to the address below.

Good luck and thank you!

We wish you the best of luck with your fundraising efforts! We can't wait to see what you try and look forward to hearing from you. Please contact us (fundraising@taxvol.org.uk) to let us know about your fundraising event - we would love to share your efforts on our social media channels.

Fundraising disclaimer:

Please be aware that Bridge the Gap, TaxAid and Tax Help for Older People do not have any responsibility or liability for your self-run fundraising events. Bridge the Gap, TaxAid and Tax Help for Older People are not responsible for injury or illness resulting from your participation or for any damage or losses incurred when running your own fundraising event. You are responsible for ensuring you follow health and safety guidelines and ensure that you have appropriate insurance, licences and permissions in place to host your event. Please take a look at this website for more guidance on fundraising:

<https://www.fundraisingregulator.org.uk/code/specific-fundraising-methods/events>

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