

Trustee Recruitment 2026. Candidate Information Pack.

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Chair's Letter.

Welcome to TaxAid! Thank you for your interest in joining our Board of Trustees.

We are a registered charity which for over 30 years has provided a lifeline for people lost in the tax system, often in crisis, who can't afford to pay for help and have nowhere else to turn.

And while we help them untangle the tax, many of them face mental, or other, health issues, homelessness and debt.

The challenges, and opportunities, we face are in common with many not for profits, but what we do as a charity is unique.

TaxAid is a well respected charity which partners with some of the UK's largest firms and organisations; as well as having a network of senior Ambassadors and relationships.

This has been a year of great change. We merged with our sister charity, hired new members of the senior team, undertook a rebrand, developed a plan for a new Beneficiary Strategy; and now are reviewing our approach to fundraising. So, with these strong foundations, this is an exciting time for the Charity.

Our new Beneficiary Strategy will ensure that we can help far more people who need our support and that we can meet their needs in a changing environment. We want to make our services more accessible through technology and new ways of working and we are looking for additional trustees with the experience that will better help us support the charity through these changes. In particular we are seeking people with experience in social care and in digital services development. You don't have to understand the tax system; we have a depth of tax professional experience on the Board.

TaxAid's clients come from diverse backgrounds. We are keen to reflect this in our trustee Board and are particularly keen to hear from applicants who are from Black, Asian or other minority ethnic groups. We strongly value the contribution people with these backgrounds would bring to our discussion. Additionally, many of the Board are currently London-based (though we originate from other parts of the UK). With our UK-wide delivery, applicants from Scotland, Northern Ireland or the North of England might help with developing new partnerships.

Best wishes

Kevin

About TaxAid.

Our clients.

Not only better off people and businesses need tax advice. People in poverty can also face tax difficulties and experience serious problems if they can't pay for essential tax advice. We support people on low incomes and those experiencing hardships or disadvantages that make it difficult to get the help they need, including those impacted by physical or mental health problems, disability, the recently bereaved or homeless. We respond to our beneficiaries' needs with humanity. We treat every question as valid, every person with care, and every situation as unique. The help TaxAid gives resolves the problem, enables the client to pay the right amount of tax and get on with the rest of their life.

Our charity.

TaxAid is a charity that helps people in poverty when they get into difficulty with their tax. It was set up in 1992 by tax professionals who were concerned that people on low incomes were suffering significantly because they could not afford tax advice. There was evidence that people were being made bankrupt unnecessarily on tax demands based on estimated figures; that people had overpaid tax for years because they didn't understand the rules; and that unrepresented people did not know how to access the rights of appeal.

In July 2025 we merged with Tax Help for Older People, a charity that started in 2001 and focussed on helping the over 60s on lower incomes who needed help with their tax. This complemented TaxAid's previous focus on working age people.

The need for tax advice has grown significantly since the charities launched. There has been a substantial increase in the number of self-employed people in recent years, many on low incomes and more vulnerable. Financial pressures on the labour market are creating more complex compliance need at lower incomes, and the cost-of-living crisis is creating increasing levels of personal debt including tax debt. We have seen a 58% increase in people seeking help over the last three years alone.

Our Transformation Strategy.

We therefore want to support more people who are facing such problems. We also know that HMRC's delivery of digital by default services is disadvantaging



some who can't cope with digital services, while there are others we can best help by providing them with digital support. We have developed a new beneficiary-led Transformation Strategy to help us achieve this aim. Our goal is to revolutionise the provision of tax support for those otherwise unrepresented and struggling to access the tax help they need. To do this we need to invest in digital infrastructure and our people. We also need to work effectively with non-profit partners to eliminate duplication and speed up responses for our beneficiaries.

About the trustee recruitment.

The TaxAid Board.

TaxAid currently has a board of 10 trustees (soon to reduce to 8) who work closely with the executive (senior management) team. We meet once a quarter, usually alternating between in-person and online, and also support the small executive more directly where the trustee has relevant experience.

Role of the trustees.

Our trustees play a vital role in ensuring TaxAid fulfils its purpose and best supports people in need who need help with their tax affairs. All trustees:

- support and advise the executive on TaxAid's purpose, vision, strategy and activities
- approve strategic policies and operational plans
- approve budgets and financial plans and monitor progress
- ensure the organisation is managed effectively and efficiently
- identify and evaluate strategic risks
- and generally provide support and constructive challenge to the CEO and her senior team

For a more in-depth view, the Charity Commission's guidance explains the key duties of all trustees and what trustees need to do to carry out these duties competently. <https://www.gov.uk/government/publications/the-essential-trustee-what-you-need-to-know-cc3>

Recruiting additional trustees.

TaxAid is supported from across the tax profession and our trustee experience reflects that, together with voluntary sector knowledge. Because of recent changes in Board members, we are keen to add to the experience of our trustee team to ensure we can support the charity in delivering its transformation strategy and we are looking to appoint two additional trustees through this recruitment exercise. The people we are seeking do not need tax experience but do need to care about helping people on low incomes and those facing hardships or disadvantages, and to understand the problems they face.

We have identified these particular needs:

- **a voluntary and community sector (VCS) background**, preferably an advice sector one, which will help us make referral partnerships and

other connections across the VCS and better understand the organisations with which we may want to partner.

- **a digital service development role**, which is about supporting the charity's ambition to revolutionise the provision of tax advice to our beneficiaries, helping them to navigate HMRC's digital by default delivery and cope with the challenges of Making Tax Digital. We are looking for someone with a broad perspective of digital services with experience of helping people on low incomes.

More detail on these roles is given in the appendix.

We are looking for people who would bring enthusiasm and commitment and who will add additional experience and skills to our Board. We want trustees who:

- can work effectively as a member of the trustee team, with a commitment to the aims and values of the organisation and act in the best interests of the charity and its clients
- are willing to devote the time needed
- are willing to support the executive team as needed
- have independent judgement and good strategic vision

Recruitment Process.

The closing date for applications will be **31st May 2026**

Interviews will be held online on **22nd and 24th June 2026**.

How to apply.

Please send a letter saying why you are interested in becoming a TaxAid trustee, the skills and experience you would bring and what you think you could contribute to our board.

Please also attach a CV (or LinkedIn profile or similar)

If you have any questions or would like to speak to our Chair please contact Ayo Ogunwumiju, PA to the CEO, at ayo@taxaid.org.uk

Appointments.

Trustees are appointed for a term of 4 years which can be renewed.

Appendix – the vacant trustee roles.

Here is additional detail on the two trustee roles we are recruiting through this exercise and the people we are looking for:

Voluntary and Community Sector (particularly advice) role.

You will help us understand VCS organisations, particularly advice providers (e.g. Citizens Advice Bureaux, law centres), their agendas and developments, and make connections to partners and allies within your sectors of expertise. You will want to help us develop compelling referral partnerships.

You will care about helping people in poverty and have an in depth understanding of the networks, policy agenda and challenges of an area of non-profit social provision. You may have a service delivery background in a poverty or social care charity, housing association or community organisation. You may have worked in community policy and support. You will certainly have a wide professional network you are happy to share.

Digital Service expertise Role.

You will help us understand digital developments and agendas and make connections to partners and allies within your sectors of expertise. You will want to help us develop imaginative solutions both in providing digital services for those beneficiaries who are best helped that way, and for people needing assistance with HMRC's digital by default approach including mandatory Making Tax Digital for Self-Assessment.

You will care about helping people in poverty and will understand the problems facing vulnerable people who need to join a new, and at times, complex digital service. You may have a background in developing digital strategy to engage people on low incomes or in helping people access digital services. You may have a wide understanding of digital service provision from an end user perspective. You will certainly have a wide professional network you are happy to share.