

Beyond the numbers: human stories behind tax problems

Briefings



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We share an example of how Tax Help for Older People and TaxAid can provide real support to taxpayers in need.

Without the support of a tax adviser, many people do not fully understand their tax liability. Misunderstanding the tax system and being unable to afford skilled paid tax help can lead to taxpayers on a lower income paying more in tax than they should.

Simon's story is a perfect example of how someone who could not afford paid tax advice benefited from the support of a professional tax adviser. Simon had received letters every year since 2018 describing his tax position. Simon is blind, and although the letters were in braille and he could read them, he did not understand what they meant.

He called Tax Help for Older People's helpline and asked for support understanding these letters. His case was passed to a volunteer tax adviser.

We helped Simon to understand that the letters were explaining that he owed tax to HMRC, as he had been underpaying tax through his wages. However, on further investigation, we discovered that there had been an error. Simon did not owe any tax to HMRC but, in fact, was owed a repayment of tax.

With our help, Simon received a repayment of £749. He was incredibly grateful for the support, sharing his thanks and feelings of relief that he no longer owed money to HMRC.

It is only thanks to our generous supporters in the tax community, volunteering, fundraising and donating to our cause, that we are able to help people like Simon, supporting him through our helpline service. Without help, Simon may have paid tax that he did not truly owe, simply because he did not understand the system.

Tax Help for Older People and TaxAid support people in the UK who are unable to afford paid tax help, but who have a tax problem. If you would like to support us please consider making a donation. View our CAF donation page to make a one-off or regular donation to the charities. Just scan the QR code above or visit this website: cafdonate.cafonline.org/18211