

## Working in Partnership

Tax Help for Older People is a totally independent service offering a fully professional and confidential service to all of its clients.

We work closely with other voluntary and statutory bodies and organisations working for older people's well-being, such as Age UK, CABs and Tax Aid.

We are funded through a range of sources including the tax sector, corporate sponsorship and donations from the public. We are also supported by HMRC in furtherance of their aim to help the most vulnerable with their tax affairs.

## Support our work

If you would like to make a donation to support the work of Tax Help for Older People then simply send your donation to our Pineapple Business Park address or go to our website.

When donating please remember if you are a UK tax payer your money will go further if you Gift Aid it. This is a great way to add 25% to the value of your gift without costing you a penny more.

Speak to us if you are unsure.



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

**Tel: 0845 601 3321\* or 01308 488066**

*\*Calls to our 0845 number may cost 5ppm if not included as free in your call package, as well as your phone company's access charge.*

**Email: [taxvol@taxvol.org.uk](mailto:taxvol@taxvol.org.uk) Website: [www.taxvol.org.uk](http://www.taxvol.org.uk)**

*Tax Help for Older People is a service provided by the Charity Tax Volunteers for older people on a lower income. Tax Volunteers, a company limited by guarantee No. 4894491*

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*Registered Office: Artillery House, Artillery Row, London SW1P 1RT*

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# TAX HELP

## For older people

The charity service providing FREE help and advice to older people with tax problems.



# Tax Help for Older People

## Who we are

Tax Help for Older People is a service from the registered charity Tax Volunteers providing free independent help and advice on personal tax issues. Our helpline team based in Dorset is fully trained in personal tax as it affects the older person living on a lower income. We have around 450 expert volunteers covering the whole of the UK and work closely with those Age UK and Citizens Advice Bureaux who allow us to use their premises for local appointments.

## Who do we help?

We help older people living on lower incomes who cannot afford to pay for professional tax advice. Essentially, this means those approaching 60 and older on individual incomes of less than £20,000 per annum.

If you are caring for an eligible older person you may also request help on their behalf. You do not need power of attorney to do this.

## How we help

Our helpline is operated by a friendly and caring team who will listen to your concern and give you the time required to resolve your query. If it is a simple one we can probably deal with it on the phone or by post and email. If it is more complex, or if you would prefer, we may be able arrange for a face-to-face meeting with a local volunteer tax adviser.

Face to face appointments are by arrangement and generally held at your local Age UK/Concern, Citizens Advice Bureaux or other community organisation. However, where the need arises we may offer a home visit.

Our service is free, confidential and tailored to your needs.

## What sort of problems?

Our aim is to help you understand your personal tax affairs and to help you work with HMRC so that you can resolve issues and pay the right amount of tax at the right time. If your query is outside of our remit, we will try to signpost you to an organisation that can help.

## We can check that

- your tax codes are correct
- the tax you have paid is correct
- you understand the letter that HMRC sent you
- you understand why you have an underpayment and what you can do next
- you are completing the correct forms

## We can help you to

- put things right
- talk or write to HMRC and other organisations
- question why something has happened
- understand the tax implications of decisions
- complete tax forms
- appeal or complain if necessary

## How can you contact us?

Helpline – 0845 601 3321\*  
or 01308 488066

Email – [taxvol@taxvol.org.uk](mailto:taxvol@taxvol.org.uk)

Website secure form –  
[www.taxvol.org.uk/contact-us](http://www.taxvol.org.uk/contact-us)

Write to – Tax Help for Older People  
Unit 10, Pineapple Business Park  
Salway Ash, Bridport  
Dorset DT6 5DB

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