TaxAid campaign to aid disadvantaged taxpayers with MTD transition

Briefings

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TaxAid, Britain’s leading tax advice charity, is launching a major fundraising campaign to help disadvantaged taxpayers navigate the transition to Making Tax Digital for Income Tax Self-Assessment (ITSA).

The campaign follows TaxAid’s merger with Tax Help for Older People in July 2025, under the unified TaxAid name, to ensure continuity and public recognition.

Last year, the combined organisations supported more than 18,000 people and secured over £1.2 million in debt relief and refunds for clients facing tax challenges.

The impact of Making Tax Digital

Government statistics show that from April 2026, around 780,000 people with business or property income over £50,000 will be required to join MTD for ITSA, with a further 970,000 to follow from April 2027. At the same time, the frozen personal allowance is pushing more pensioners and lower-income individuals into Self-Assessment for the first time.

TaxAid has seen a 58% increase in people seeking help over the past three years, and expects demand to rise sharply as MTD rolls out.

Chief Executive Valerie Boggs said: ‘Some of the most vulnerable will not be able to cope with a mandated digital service or may need help to do so. The combination of MTD and fiscal drag is creating unprecedented pressure on those least able to navigate the system.’

Digital infrastructure investment

Launching in the new year, the campaign will fund investment in technology, tools, resources, training and online services to expand the charity’s reach and help it to support more disadvantaged people. TaxAid plans to implement advanced triage technology to direct people to the right kind of support – whether specialist support for complex MTD issues or simple guidance for basic queries.

Currently largely reliant on its telephone hotline, the charity will expand contact channels to include email, web chat and messaging. ‘At TaxAid, we want to ensure that all disadvantaged people can access the support they need to adapt successfully,’ said Valerie. ‘This is why growing our income has never been more essential.’

TaxAid will also train more than a dozen voluntary sector organisations across the UK to handle straightforward tax problems locally. This work is already underway, and will create a two-tier support network where complex cases receive expert attention from TaxAid’s 300+ specialist volunteers, whilst straightforward cases are managed locally by trained partners.

Support needed

Valerie added: ‘Some people lack access to suitable technology, others are unfamiliar with digital systems, and many will find it challenging to navigate digital-only reporting. Making Tax Digital will work well for digitally confident taxpayers with straightforward affairs, but vulnerable people who need additional support will need expert help during this transition.’

She continued: ‘We will call on funders to help us build the digital bridges these taxpayers need. This will ensure complex Making Tax Digital cases get expert attention, simple problems get local solutions, and nobody falls through the cracks as the tax system undergoes its biggest change in a generation.’

TaxAid represents clients who need assistance in understanding and navigating HMRC, helping them to untangle tax problems that threaten their financial stability. Tax professionals and organisations interested in supporting the campaign can contact Deborah Graham-Vernon, Director of Fundraising, at deborah@taxaid.org.uk.

For further information, visit: www.taxaid.org.uk