Interview with Leon Ward, new Chief Executive of TaxAid

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Just weeks into his new role as Chief Executive of TaxAid, Leon Ward talks to Tax Adviser editor Angela Partington about the challenges facing vulnerable taxpayers, his ambitions for the charity and why education could be key to its future.

Just four weeks into his new role as Chief Executive of TaxAid, the charity providing free specialist tax advice to people on low incomes, Leon Ward has already been struck by the complexity of the lives of those seeking help.

Some are experiencing domestic abuse, serious illness or insecure housing. Others are juggling several low-paid jobs, perhaps combining driving for Uber with shop work, caring responsibilities or selling goods online. Older people, meanwhile, may struggle to understand the tax implications of their pensions. With little formal education about tax and limited understanding of their obligations, many can find themselves in complicated situations without even realising that something has

gone wrong.

For people facing such challenges, navigating the tax system can be an almost impossible additional burden. ‘If you’re looking for somewhere to live, the last thing you want to do is have to find your Government Gateway ID,’ he says.

Listening to calls from the charity’s helpline has given Ward an immediate insight into how easily tax problems can arise, and how difficult they can be to resolve when people are already facing other pressures.

‘Most people want to get it right,’ he says, but too often they struggle with the tax system. It is a challenge that Ward is keen to address as he begins to shape the next chapter in TaxAid’s development.

A background in social mobility

Ward joined TaxAid on 5 October, having spent three and a half years as Chief Executive of Money Ready, a national financial education charity. During his time there, he expanded its operations across all four UK nations, oversaw a rebrand and led a merger with another financial literacy organisation.

His earlier career was spent largely in education and social mobility, working with organisations that helped young people develop their confidence, skills and opportunities.

At Money Ready, he began to question the assumption that financial education should concentrate almost exclusively on younger people. The charity extended its services to people up to the age of 40, recognising that financial understanding does not necessarily develop automatically with age.

‘You turn 18 and then everything’s thrown at you,’ he says, pointing to the sudden responsibility of managing credit cards, mortgages, employment income and debt.

For Ward, the move to TaxAid represents a natural progression. While financial education can help people make informed decisions, TaxAid deals with the consequences when people find themselves unable to navigate their obligations. Although Ward was unfamiliar with TaxAid before taking up the role, he quickly recognised the importance of its work and the opportunities to build on its achievements. Raising awareness of the charity and extending its reach are now

among his priorities.

When life gets complicated

Following its merger with Tax Help for Older People, TaxAid now brings together services previously delivered by two charities, including specialist support for older taxpayers.

Ward sees the merger as an opportunity to provide a more joined-up service. Both organisations were already operating with relatively lean structures, and he emphasises that bringing them together was not primarily an exercise in cutting costs. Instead, the merger brings together complementary services, allowing the charity to support people with tax difficulties at different stages of their lives.

The problems clients bring to TaxAid are often more complicated than they initially appear, particularly when people have misunderstood their obligations or assumed that their tax affairs are being dealt with automatically. Ward recalls listening to a call from a construction worker who had spent years believing that his tax responsibilities were being met because deductions were made from his earnings under the Construction Industry Scheme.

‘They took tax off me at the point of pay. So I thought that was done,’ the caller explained. It was only later that he discovered his tax affairs had not been fully dealt with, leaving him facing a problem that had developed over a considerable period.

Ward believes this reflects a wider problem. People are accustomed to providing their National Insurance number when starting work and may reasonably assume that the information needed to calculate their tax is already available to government. It is understandable that some taxpayers believe their obligations are being met without any further action on their part. ‘You would just think it was all sorted,’ he says.

The difficulty is compounded by a lack of understanding about how the tax system operates. Ward identifies what he describes as a ‘perfect storm’: complexity within the system, insufficient education about tax and pensions, and the reluctance or lack of confidence that can prevent people from seeking information.

Supporting vulnerable taxpayers

One of the challenges facing TaxAid's advisers is the need to understand much more than the immediate tax problem. Clients may explain that they are off work because of illness, experiencing a relationship breakdown or struggling with their housing situation. Advisers must therefore consider not only the technical issue but also the circumstances affecting an individual's ability to deal with it.

The charity works closely with other organisations supporting vulnerable people, including Age UK, debt advice providers and domestic abuse charities. These organisations often identify clients who need specialist tax assistance and refer them to TaxAid, which can provide expertise that falls outside their own remit. 'We can do the bit that other organisations don't feel comfortable doing,' Ward explains.

TaxAid also works with HMRC's Extra Support Team, which can help progress cases involving vulnerable taxpayers. Ward is positive about the relationship with HMRC, although he recognises the scale of the challenge. With millions of taxpayers and a comparatively small team at TaxAid, the charity's intervention can sometimes feel like 'a drop in the ocean'.

One area of particular concern is the increasing digitalisation of tax services, which can create additional difficulties for older people who may lack the equipment, confidence or ability to access online systems. But Ward points out that digital exclusion is not always simply a question of access to technology. His own grandmother, for example, uses an iPhone and is comfortable with social media, yet she struggles to process correspondence from HMRC, the Department for Work and Pensions or pension providers. When a letter arrives, she turns to him for help.

Her experience illustrates an important distinction: being comfortable with digital technology does not necessarily mean someone can understand complex financial information or manage their tax affairs independently. Ward believes that even those who are financially knowledgeable can struggle with the tax system, making the need for clearer information and simpler processes all the more important.

From solving problems to preventing them

For Ward, however, simplifying the tax system is only part of the answer. Drawing on his background in financial education, he is keen to explore how TaxAid might

help people understand their obligations before problems arise, rather than simply stepping in when things have gone wrong.

With financial literacy being considered as part of the school curriculum, Ward believes there is an opportunity for TaxAid to contribute its specialist knowledge to discussions about what young people should learn, particularly about their future tax obligations. ‘I think there is a role for TaxAid to be talking about what tax education might be appropriate for kids at 14, 15, 16,’ he says. Introducing these concepts at an earlier age could help people prepare for the financial responsibilities they will encounter when they start work.

Another area he is interested in exploring is the support available to younger entrepreneurs, particularly those setting up businesses for the first time. Someone starting out as self-employed may have little understanding of record-keeping, the distinction between business and personal finances or the obligations that arise when incorporating a company. Ward recalls a young friend working as a DJ who had not realised the importance of separating his income and keeping appropriate records.

For someone trying to establish a business, an unexpected tax liability can be particularly damaging. ‘What we don’t want them to do is be smacked with a massive tax issue that demotivates them and takes the wind out of their sails,’ he says. Although TaxAid’s services are restricted to people on low incomes, Ward believes there may be opportunities to support those in the early stages of entrepreneurship, when earnings are often modest.

Technology could also have a role to play in helping people access advice. Ward has already seen evidence of how artificial intelligence is changing the way people seek assistance. A number of callers recently said they had discovered TaxAid through AI tools. While he sees opportunities for AI to help people identify problems and find appropriate support, he is concerned about the risks of relying on automated information without professional oversight.

‘AI should enhance what we do, not replace it,’ he says. One possibility he is considering is the introduction of a website chatbot to deal with straightforward enquiries, although he acknowledges that the wider implications of AI for advice charities remain uncertain. For now, the priority is to understand how the technology can help people access reliable advice without losing the human expertise that is

central to TaxAid’s work.

Growing the organisation

Alongside these ideas for developing TaxAid’s services, Ward has clear ambitions to expand the organisation itself. ‘I’m definitely here on a growth agenda,’ he says. He wants the charity to reach more people, raise awareness of its services and strengthen its position both within the tax profession and beyond it.

But growth presents a challenge. TaxAid is already managing considerable demand, with Ward acknowledging that the immediate priority is not necessarily to attract more callers, but to ensure that the organisation has the resources to help them. The average helpline waiting time is currently only around 10 minutes, although Ward has yet to experience the pressures associated with the self-assessment deadline.

Expanding the charity’s capacity will require investment not only in frontline advisers but also in the systems and infrastructure needed to support their work. Ward acknowledges that securing funding for essential infrastructure, such as IT systems, can be more challenging than attracting support for frontline services. He is also conscious of the need to attract and retain experienced staff, particularly when charities must compete with commercial employers for skilled professionals. His ambition is to make TaxAid one of the best charities in the country to work for.

These priorities will help shape a new organisational strategy, which Ward expects to publish in the coming months, setting out the charity’s direction over the next three to five years. He is also considering how to use TaxAid’s 35th anniversary in 2027 as an opportunity to raise awareness and strengthen support. One possibility is the launch of a three-year strategy taking the organisation to 2030, providing a focus for its next phase of development.

The profession’s role

Achieving these ambitions will depend in part on continued support from the tax profession, whose expertise is central to TaxAid’s work. The charity relies on a combination of paid advisers, helpline staff and volunteers, including professionals working with its corporate partners. Its triage team handles initial enquiries and can

resolve some straightforward problems, such as queries about PAYE coding notices, while more complex cases are referred to qualified advisers or volunteers.

The commitment required can be considerable. Some cases take several months to resolve, and Ward mentions one particularly complicated case that has been ongoing for three and a half years. Volunteers therefore need more than technical expertise. ‘We’re looking for people that have the time and the patience to work with people that face complex situations,’ he says, emphasising the importance of care and compassion when clients struggle to explain their circumstances or are dealing with other difficulties in their lives.

Ward is grateful for the support TaxAid already receives from CIOT and ATT and hopes to build on these relationships as he develops the charity’s strategy. He believes there is considerable goodwill within the profession, particularly among experienced practitioners who may be looking for opportunities to use their skills to help others. However, volunteering is not the only way to contribute. Fundraising, financial donations and raising awareness of the charity’s work can all help TaxAid increase the support it provides.

As TaxAid approaches its 35th anniversary, Ward sees an opportunity to build on the charity’s achievements while extending its reach and exploring new ways to prevent tax problems before they arise. His first few weeks have reinforced the importance of that work, and the challenge of ensuring that people who want to meet their obligations have the support they need to do so. Behind every tax problem is an individual trying to make sense of their obligations, often while dealing with much more pressing concerns. Helping them to do so remains at the heart of TaxAid’s work.

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