

**DATED 7 January 2022**

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**THE TAX ADVISERS' BENEVOLENT FUND  
(Registered Charity Number: 1049658)**

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**PUBLIC NOTICE OF INTENDED AMENDMENT TO OBJECTS  
OF THE CHARITY**

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**HIGGS & SONS SOLICITORS  
3 Waterfront Business Park  
Brierley Hill  
West Midlands  
DY5 1LX**

**Ref: KMM/EJEW/543725/1**

**THE TAX ADVISERS' BENEVOLENT FUND ("the Charity")**

**REGISTERED CHARITY NUMBER: 1049658**

**Public Notice of Intended Amendment to Objects of the Charity**

The Trustee of the Charity hereby gives notice that it proposes to make an application to the Charity Commission to update the Charity's objects clause.

**The current Objects of the Charity are as follows:**

*"The Objects of the Charity hereby created are:*

- 3.1 the relief of necessitous persons who are or have been members of the Chartered Institute of Taxation (and its successors and assigns) or of the predecessor body the Institute of Taxation or of the Association of Taxation Technicians (and its successors and assigns) or who are the wives, husbands, widows, widowers, issue or dependants of such persons; and*
- 3.2 the advancement and promotion of such charitable objects or purposes as shall be exclusively charitable according to the law of England and Wales."*

**Proposed revised objects:**

- 1. The Objects of the Charity are for the public benefit:*
  - 1.1 the prevention or relief of poverty, suffering, distress, or financial hardship amongst:*
    - 1.1.1 current and former members and of the Chartered Institute of Taxation (registered charity number: 1037771) (and its predecessor body, the Institute of Taxation) and the Association of Tax Technicians (registered charity number: 803480) (and any successor bodies) and their Dependants;*
    - 1.1.2 students and prospective students of (including those studying or intending to study examinations organised or sponsored by) the Chartered Institute of Taxation and the Association of Tax Technicians and their Dependants;*
    - 1.1.3 individuals (including their Dependants) and organisations undertaking charitable and/or voluntary work connected to the administration and practice of taxation and/or the taxation profession;*
  - 1.2 the advancement of education in and the promotion of the study of the administration and practice of taxation; and*
  - 1.3 the advancement of such charitable purposes (according to the law of England and Wales) as the Trustee sees fit from time to time.*

### ***Interpretation***

*'Dependants' is more particularly defined in the Charity's policy documents in place from time to time);*

The Charity was registered in 1995 with objects that were suitable for the range of professionals working in the tax sector at that particular point in time. Since 1995 there have been significant changes to the regulation and training requirements of those working in the tax sector. One of the key reasons, therefore, in making this change is to bring the Charity's objects up to date with the change in demand from its beneficiaries and ensure they accurately represent the class of beneficiaries which the Charity can and should be assisting. The intention is to modernise the Charity's objects clause and to accurately reflect the needs of its beneficiaries in light of current social and economic circumstances.

The proposed objects retain the spirit of the original gift by ensuring that the current beneficiaries will not be placed at a detriment as the charitable intent of assisting those working in the tax sector has not changed.

If you have any comments or queries about the proposed amendment these should be sent in writing to Bob Harland at:

18 Maiden Erlegh Drive  
Earley  
Reading  
Berkshire  
RG6 7HP

or by email to [bobharland@btinternet.com](mailto:bobharland@btinternet.com)

The Trustee will consider representations received at the above address by:

(being one month from the first date of publication of this notice.)

Date: 7 January 2022