

**JOB SPECIFICATION:**  
**Tax Assistant Manager**



<b>Name:</b>		<b>Effective from:</b>	
<b>Department:</b>	Corporate		
<b>Job Title:</b>	Corporate Tax Assistant Manager		
<b>Reports To:</b>			
<b>Direct Reports:</b>			
<b>Hours / Days:</b>	9.00 am - 5.30 pm	Monday - Friday	37.5 hours
<b>Job Summary:</b>	Responsible for assisting the Corporate Tax Directors and working as part of a team with them in the provision of high quality compliance services for a range of corporate clients including the preparation and submission of R&D tax claims and assisting on the provision of a wide variety of corporate tax advisory work.		

**Key Activities:**

**1. Tax**

- Review draft corporation tax returns for Managers, Associates and Partners across the firm as requested.
- Present to Managers, Associates and Partners key findings from reviews.
- Ability to identify potential tax issues and planning opportunities and communicate these to the Corporate Tax Directors and Managers, Associates and Partners as appropriate.
- Provide support and assistance to colleagues across the firm on corporate tax compliance matters.
- Research and conclusion of technical points in respect of corporation tax compliance and communication of findings to Managers, Associates and Partners.
- Communicate with HMRC in writing or by telephone on matters affecting clients as and when they arise.
- Assist the Corporate Tax Directors on the provision of corporate tax advisory services to corporate clients throughout the firm including the preparation of R&D tax claims.
- Corporate tax advisory work to include but not limited to drafting tax clearances, preparing valuation reports for both tax and commercial purposes and writing tax advisory reports on a variety of subject matters including tax planning, restructures and reorganisations.
- Co-ordinate and assist with the preparation of ATED annual return forms and ERS annual return forms for the firm and monitor the progress of such returns through completion of the control spreadsheets.

## **2. Client Management and Business Development**

- Responsible for the management and completion of corporate tax work delegated from others across the firm. Keeping Directors, Partners and Associates informed of progress.
- Manage and develop client relationships, including regular client contact by telephone, emails and meetings. Ensure client relationships are built upon to maintain strong relationships with clients.
- Identify opportunities for additional services in relation to your role and discuss with Corporate Tax Directors, Partners and Associates.
- Awareness of business development including representing the Firm at networking events as requested.
- Understand, engage and assist with the marketing activities of the business.
- Play an active role in raising the profile of the business.
- Display a confident, accurate and reliable tax knowledge when interacting with clients.
- Actively engage with senior staff and Partners to gain a good understanding of the business.

## **3. Staff**

- Provide technical assistance to non-tax staff.
- Provide corporate tax training to non-tax staff appropriate to their level of experience.
- Provide tax software assistance (both alphatax and CCH) to non-tax staff and basic training as requested by Partners and Associates.
- Delegate tasks effectively.
- Review work of junior staff, ensuring quality in compliance with professional standards / requirements.

## **4. General**

- Undertake general administration tasks.
- Effectively communicate with colleagues within the organisation to promote teamwork across the group and assist in the development of internal relationships.
- Liaise with and support work colleagues as required.
- Participate in internal / external meetings as required.
- Identify and meet personal job-related training as required.
- Provide assistance in terms of general and specific support to Partners and colleagues.
- Undertake other reasonable work activities as determined by the Partners.
- Undertake appropriate training to ensure CPD criteria is met.
- Ability to work under pressure and cope with stressful situations.
- Excellent time management and an appreciation for the practicalities of time management within all aspects of professional work.
- Attend and actively participate in the Bury St Edmunds office Managers meetings.