

JOB SPECIFICATION:

Trainee Tax Technician



Name:		Effective from:	July/August/September 2025
Department:	Tax		
Job Title:	Trainee Tax Technician		
Reports To:	Jake Day		
Hours / Days:	9.00 a.m. - 5.30 p.m.	Monday - Friday	37.5 hours
Job Summary:	Responsible for assisting the senior staff in the provision of high quality compliance services for a range of private clients including high net worth individuals, directors of small and medium sized companies and trustees.		

Key Activities:

1. Tax

- Preparation of draft self-assessment tax returns.
- Load tax return information onto the firm's software (CCH) to produce returns and calculations.
- Monitor the progress of tax return preparation and payment of tax through the tax cycle.
- Production of P11Ds.
- Draft covering letters to clients detailing tax due.
- Communicate directly with HMRC when necessary.
- Provide assistance to senior colleagues in completing larger projects.

2. 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.
- Identify and meet personal job-related training as required.
- Provide assistance in terms of general and specific support to partners and managers as required.
- Undertake other reasonable work activities as determined by the partners and managers.
- Undertake appropriate training to ensure CPD criteria is met.