

JOB SPECIFICATION:

Manager

Name:		Effective from:	
Department:	General Practice		
Job Title:	Manager		
Reports To:		Manager	
Direct Reports:			
Hours / Days:	9.00 a.m. – 5.30 p.m.	Monday - Friday	37.5 hours
Job Summary:	Responsible for managing a portfolio of clients providing timely 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 Responsibilities:

1. Accounting

- Fully accountable for the timely provision of accounting services including corporate and personal tax returns and special services for a portfolio of clients with annual fees of £200k.
- Review and completion of accounts file for Partners/Associates review.
- Review and finalisation of work prepared and conclude on all final points for review.
- Provide projections and forecasting information.
- Review and finalisation of management information.
- Effective communication with clients.
- Consolidations and other complex accounting processes.
- Review and produce VAT returns as required; provide an in depth knowledge and advice service to clients.
- Manage budgets and compliance processes.
- Utilise a variety of paperless software applications.
- Preparation of budgets for accounts work.
- Raising bills.
- Ensure company secretarial process is followed and advise clients of their responsibilities.

2. Business Development / Client Management

- Manage portfolio of clients.
- Identify opportunities for additional services.
- Manage and develop client relationships, including regular client contact by phone, emails and meetings.
- Introduce new clients to the practice.
- Play an active role in raising the profile of the business.
- Display a confident, accurate and reliable accounting knowledge when interacting with clients, presenting ideas and implementing strategies.
- Liaise with clients for debt recovery as required.
- Actively engage with senior staff / partners to gain a good understanding of the business.
- Understand, engage and assist with the marketing activities of the business.
- Attend local networking events as required.

3. Client Accounts

- Review and finalise client's records.

- Review and finalise file sections and cross referencing schedules.
- Review and finalise completed work programmes and administration paperwork.
- Attend client's premises when required.
- Contact clients for information.

4. Tax Compliance / VAT

- Review completed VAT return forms.
- Communicate with client when VAT return is complete and submit to HMRC.
- Review prepared self-assessment tax returns, business and partnership tax returns to include detailed capital gains computations and preparation of schedules of income from property.
- Review information processed on a computerised tax soft software to produce returns and calculations above.

5. Payroll

- Review P11D advice and services.
- Review payroll processed on behalf of clients to strict deadlines.
- Review submitted FPS and EPS as required.
- Liaise with clients as required.

6. Company Secretarial

- Review company secretarial returns prior to submission.
- Review company secretarial work and statutory books.

7. Staff

- Mentor, supervise and coach staff assigned and contributed to non-client work.
- Review work of staff, ensuring quality in compliance with professional standards/requirements.
- Delegate tasks effectively.
- Assisting with the recruitment and selection of staff.
- Responsible for training and development of direct reports including providing feedback.
- Ensure Partner decisions on staff are promptly implemented.
- Ensure staff motivation and loyalty is maintained to minimise staff turnover.
- Ensure effective communication systems between management and staff are established and disseminated to all staff in the company to ensure coherence and a positive team spirit.
- Conduct annual appraisals and quarterly reviews for all direct reports.
- Actively manage direct reports in respect of holiday, sickness and general day-to-day management.
- Monitor and encourage improvements towards standards of work via guidance, coaching and mentoring.
- Highlight and recommend training requirements for direct reports.
- Encourage / foster a culture of continuous development.

8. 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.
- 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 managers meetings as required.