

JOB SPECIFICATION:

Tax Manager



Name:		Effective from:	
Department:	Tax		
Job Title:	Tax Manager		
Reports To:		Partner	
Direct Reports:			
Hours / Days:	9.00 am - 5.30 pm	Monday - Friday	37.5 hours
Job Summary:	<p>Responsible for assisting the Tax Partner (and other partners) and working as part of a team in the provision of high quality compliance services and advisory services, for a range of private clients including high net worth individuals, non-resident individuals and Trustees.</p> <p>Identifying areas of added value and providing relevant advisory services.</p> <p>ATT qualified with 2 years post qualification experience. Hold or studying towards final CTA qualification a distinct advantage, but not essential.</p>		

Key Activities:

1. Tax

- Prepare/review draft Self Assessment tax returns including capital gains computations and preparation of schedules of income from property.
- Review and monitor the progress of tax return preparation, completion and payment of tax through the tax cycle.
- Present the returns and related services to clients with appropriate explanations.
- Draft tax planning advice where appropriate with support.
- Provide technical assistance to non-tax staff.
- Complete ad-hoc advisory work as required, for higher level review, and discussions with clients.
- Review of IHT forms prepared.
- Assist the Tax partner with any advisory work to liaise with the clients.

2. Business Development / Client Management

- Responsible for the management of own portfolio of clients.
- Manage and develop client relationships, including regular client contact by telephone, meetings and electronically.
- Identify opportunities for additional services.
- Awareness of business development including representing the Firm at networking events.
- Liaise directly with business owners and accounts staff.
- Build and maintain strong relationships with clients.

- Bill clients
- Actively market the firm to new clients and identify potential clients where the opportunity arises.
- Consider efficiencies in procedures and software.

3. Staff

- Provide technical assistance to non-tax staff.
- Delegate tasks effectively.
- Review work of junior staff, ensuring quality in compliance with professional standards / requirements.
- Responsible for the recruitment, selection, training and development of direct reports.
- Manage the overall tax team
- Ensure board decisions on staff are promptly implemented and effectively implemented, including communicated back to appropriate Managers, Senior Managers, Associates and Partners, as required.
- 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 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 the team and individuals within the team.
- Encourage / foster a culture of continuous development.

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.
- 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.