

JOB SPECIFICATION:

Tax Senior



Name:		Effective from:	
Department:	Tax		
Job Title:	Probate and Estates Tax Senior		
Reports To:			
Direct Reports:			
Hours / Days:	9.00 am to 5.30 pm	Monday to Friday	
Job Summary:	To primarily assist the Probate Manager and Authorised Individuals in the provision of high-quality services for a range of probates and estate clients. In addition to assist partners/associates/managers with self-assessment tax returns, predominately for estates and trusts, but could include high net worth individuals, directors of small and medium sized companies and Trustees, on a reduced portfolio. STEP qualified, ATT qualified, Mercia probate qualification, or qualified by experience.		

Key Activities:

1. Probate and Estates

- Preparation of IHT400 forms, or equivalent, where required to progress an application for grant of probate
- Preparation of probate papers for an application of grant
- Capturing estate information on relevant software to produce forms and computations.
- Presenting the IHT returns and related services to clients with appropriate explanations.
- Monitoring the progress of the probate application and updating clients, including advice on any IHT liability
- Estate tax return preparation, or informal reporting to HMRC.
- Provision of planning advice where appropriate.
- Provision of technical assistance to non-probate staff.

2. Personal and Trust Tax

- Preparation of self-assessment tax returns to include detailed capital gains computations and preparation of schedules of income from property.
- Preparation and submission of 60-day CGT returns.
- Capturing tax return information on to tax software to produce returns and calculations.
- Presenting the returns and related services to clients with appropriate explanations.
- Monitoring the progress of tax return preparation and payment of tax through the tax cycle.
- Provision of tax planning advice where appropriate.
- Provision of technical assistance to non-tax staff.
- Preparation of IHT100 forms for trusts.
- Assist with ad-hoc advisory work as required.

3. Client Management

- Opportunity to be responsible for the management of own portfolio of clients and direct contact for probates/estates.
- Manage and develop client relationships, including regular client contact by telephone, meetings and electronically.
- Identify opportunities for additional services.
- Build and maintain strong relationships with clients.
- Production of bills on a timely basis.

4. General

- Liaise with and support work of other colleagues, as required.
- Actively market the organisation to new clients and identify potential clients when the opportunity arises.
- Undertake appropriate training to ensure CPD criteria are met.
- Undertake general administration tasks.
- Effectively communicate with colleagues within the organization to promote teamwork across the group and assist in the development of internal relationships.
- Provide assistance in terms of general and specific support to Partners, associates and managers, as required.
- Undertake other reasonable work activities as determined by the Partners, associates and managers.