

Tax Department Job Profile

JOB TITLE	Senior Tax Associate/Assistant Tax Manager	Grade	7/8
Main Job Purpose	To work with the team to ensure timely and accurate delivery of technical personal tax services.		
Key Duties	<ul style="list-style-type: none"> • Manage portfolio of own clients and relationships, together with assisting as a team member on more complex clients. • High standard of written English - ability to write professional letters and advisory reports for clients. • Ensure technical knowledge is up to date by attending the necessary courses and maintaining an accurate CPD. • Billing and WIP Management • Delegation, training and development of the junior members of the team • Active involvement in ensuring the tax department administration is kept up to date and dealt with in a timely manner • Identify cross selling opportunities to pass on / deal with directly and involvement in marketing initiatives • Professional / ethics awareness 		
Qualifications & Experience	Ideally qualified CTA At least 5 years work experience within personal tax		
Technical, Training and skill levels	<ul style="list-style-type: none"> • Newly qualified CTA taking on tax compliance portfolio of approximately 200 clients, including some Trusts and Estates • Experience in preparing personal, trust and estate tax returns to a high level of accuracy essential • Ability and desire to undertake tax advisory work in conjunction with other team members. • Main point of contact as portfolio manager, directly liaising with clients to ensure completion of assignments is in line with planned timescales • Maintaining excellent relations through effective communication with clients and colleagues, flexing approach as required to deal with the situation appropriately • Ability to use initiative and ensuring accurate documentation of work undertaken • Takes ownership of appropriate assignments, maintaining quality of work whilst organising and managing time efficiently and effectively • Delegates and coaches junior members of the team • Undertakes CPD in accordance with Institute and Rouse requirements and maintains up-to-date CPD record • Ensures technical knowledge is up to date and able to research effectively when personal knowledge or understanding is lacking 		

	<ul style="list-style-type: none"> • Aware of relevant financial targets and constraints and contributes to achieving these. Manages own client budgets keeping partner informed of progress and potential problems including actual vs. budget. • Plans time effectively and completes timesheets by the required deadline • Aware of work pressures, peaks and troughs • Maintains high professional standards of conduct and practice
Key Competencies	Level
Planning and Organisation	3/4
Client Care	3/4
Communication	3/4
Application of Technical Knowledge	3/4
Integrity and Professional Judgement	3/4
Business Awareness	3
Management and Leadership	3