

PERSONAL TAX MANAGER

Location: Exeter

Purpose To run a portfolio of personal tax clients, help provide tax support to the team and firm, help manage the private client team and oversee the personal tax compliance function.

Who are we?

We are a forward-thinking accountancy firm with a strong team of experienced professionals who work hard to provide exceptional client service. We are based in beautiful Devon with access to beaches, moors, cities and rivers, but have clients based all over the UK and beyond.

Responsibilities

Tax Compliance

- Being responsible for a portfolio of tax cases, including self-employed, HNWIs, trusts and directors and their self-assessment tax returns and computations.
- Liaising with your clients to get to know their requirements and providing advice, to build and retain commercial relationships.
- Preparing 60-day capital gains tax returns, P11D forms, ATED returns and IHT returns.
- Registering and maintaining trust records on the Trust Registration Service
- Overseeing the tax compliance requirements of the department, liaising with staff, developing their knowledge and reviewing compliance work.
- Promoting the tax department by taking potential new enquiry calls and meetings and converting them into clients.
- Compiling of reports and proposals to improve internal and external processes for the personal tax department.

Tax Consultancy

- Providing tax consultancy advice covering income tax, capital gains tax and inheritance tax for a variety of situations such as residency and domicile questions, land and property transactions, family succession planning and business purchases and sales.
- Working alongside the personal tax partners and tax director to identify commercial opportunities and assist with tax planning.
- Understanding the requirements and tax legislation to assist new clients through complex processes such as worldwide disclosures.

- Cultivating a network of professional contacts such as solicitors, surveyors and stockbrokers for mutual referrals of work.

Person Specification

- Previous experience in a tax compliance role at a Senior or Manager Level
- CTA qualified (or equivalent) or qualified by experience
- Excellent up to date technical knowledge
- Be fully aware and conversant with compliance standards imposed by the various regulatory authorities for tax
- Commercially astute, with keen analytical and problem-solving mind
- Organised and able to plan time efficiently to meet deadlines
- Ability to work independently, or as part of a team
- Strong interpersonal skills and ability to build rapport quickly with clients and team members
- Professional and discreet in demonstrating client care
- Proficient in MS Office 2010 (i.e. Excel, Word, Outlook)

Note

This job description is neither definitive nor exhaustive. It may be reviewed in the light of changing circumstances following consultation with the post holder.

To apply, please send your CV and covering letter to Jobs@simpkinedwards.co.uk