



PRIVATE CLIENT TAX – ASSOCIATE DIRECTOR

Job description

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| Reporting to: | XXXX | Department: | Private Client |
| Location: | Guildford | Direct reports: | XXXX |


Overall job purpose

The role is focused on leading the delivery of tax advisory projects for a substantial private client portfolio on behalf of the Directors and Partners. The role involves managing all aspects of client delivery including reviewing the technical content of the advice, ensuring excellent client service and timely communications with the client, keeping the Director/Partner updated and monitoring the commercial and financial aspects of the engagements.

The portfolio will mostly comprise High Net Worth and Non-Domiciled clients as well as related offshore structures. In addition to working on specific clients, the successful candidate will be expected to make a significant contribution towards the overall future development and success of the group, wider office and firm, as well as being involved in business development initiatives and networking events.

Responsibilities

- To lead complex UK and international private client wealth structuring projects and ongoing client engagements.
- To ensure that the clients' tax affairs comply with statutory requirements, and to manage work efficiently.
- To manage the assignments in accordance with the firm's standard procedures and confirm arrangements with the client, including likely costs and billing arrangements.
- To ensure tax quality at all times by adhering to the firms quality standards.
- To identify and advise on tax planning opportunities and to undertake specialist technical assignments as required.
- To brief junior staff on the client's affairs and the pre-assignment instructions. To supervise and control the completion of work, and to undertake 'on the job' training and appraisals where necessary.
- To ensure that the job is completed within budget, and to discuss all materials points arising with the assignment partner in the first instance and client immediately, particularly in relation to any anticipated overruns.
- To liaise with the client throughout the year and to practice the principles of excellent client service at all times.
- To ensure that appropriate liaison takes place with all other departments, and that all potential client needs are identified and serviced accordingly.

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- To develop a detailed knowledge of the firm's specialist services and to manage specialist work in response to client needs where appropriate.
 - To maintain an advanced level of technical knowledge through appropriate reading and courses, and to fulfil professional bodies' CPD requirements.
 - To research and prepare proposals for new work, and to take part in formal presentations to prospective clients
 - To take an active involvement in business development alongside the partners including attendance and presentations at seminars and other networking events required.
 - Attend staff meetings and training as required.
 - Maintain an awareness and observation of Health and Safety issues within the Firm, and report any concerns to the Health and Safety Representative.
 - Carry out any other duties as are within the scope, spirit and purpose of the job, the title of the role and its grading, as requested by any Partner or Director.

Personal and professional qualities

The role requires:

- Good standard of education, particularly in Maths and English
- CTA/ATII qualified or equivalent desirable
- Previous experience operating at Senior Manager level in a similar role is preferable.
- Proven experience in client handling, including managing the implementation of complex advisory projects on "core" private client issues (for example, inheritance tax, capital gains tax planning, offshore trusts, etc).
- Extensive experience of advising non-domiciled individuals together with an excellent understanding of current developments and how this impacts the wider picture.
- Proven experience in producing high quality work within budget.
- Good communication skills, team player and able to motivate staff.
- Experience of business development as well as being able to demonstrate an interest in this area of work.

Note: This job description reflects the present requirements of the role. As duties and responsibilities change, the job description will be reviewed and will be subject to amendment in consultation with the individual.