

# My tax career journey - Georgia Marshall

## What did you do before PEM?

After A Levels I knew I wanted a career in finance, but I didn't know what area I most wanted to pursue. I had no prior relevant work experience so going to university was a great opportunity for me to explore different subjects within my Accounting & Finance degree and figure out not only where my interests lay, but just as importantly, where they didn't.

Before my third year I had never considered tax as a career path for me, but when I started my tax module, I realised that it was what I wanted to do.

My university also had useful online careers resources and held lots of careers events which I found extremely helpful as I could ask people who had been in my position a few years before what their jobs involved and how they got there.

It was gaining this insight into their careers and what my own could then look like, that helped me come to the decision to apply for jobs in tax.

## Why tax?

I think a lot of people think purely 'accounting' when they think of finance and aren't aware of the range of other options within the industry.

At university there was a lot of emphasis on auditing and comparatively little insight into other career paths like tax, which made it difficult to narrow down my interests.

Initially, I was intrigued by seeing how heavily our tax policy can depend on who is governing us, and I wanted to better understand why this was



the case and what the implications to the bigger picture were. On a smaller scale, most individuals and organisations will pay tax in their lives and most share the end goal – to legally pay less of it! It's fascinating to see the impact this has on day-to-day decision-making and to apply relevant knowledge to specific situations.

## Why PEM?

A friend of a friend works at PEM and I knew that they really enjoy it. I knew I wanted to work for a company which values its staff, so I applied at PEM.

From the first time I walked through the door I instantly felt welcome and even my interview felt relaxed. I felt valued as an individual and was taken an interest in beyond being a name on an application form.

Since starting at PEM in August 2020, I have found it really is the case that it is a friendly firm.

Starting my career during a pandemic has been an unusual introduction to working life but I was warmly welcomed into the team and have been thoroughly supported throughout my training both in the office and working from home.

There is a strong support for both your professional development as well as your wellbeing and it goes a long way to make you enjoy what you do.

### What does my role involve?

Day-to-day, I assist portfolio managers in preparing clients' tax returns and other advisory and planning documents. As I've gained more experience, I've been introduced to more aspects of the work we do.

Throughout the year some clients need advice to assist their decision making and I assist with tasks such as: preparing capital gains calculations; note-taking in client meetings; researching legislation relevant to clients' circumstances; analysing income to help clients know what level of gifting they can make tax free.

The work we do is so varied, it's so much more than tax returns, and no two jobs will be the same.

I'm also studying for my ATT qualification which is fully funded by PEM. I get study leave throughout the year to attend courses and take exams. It is hard work but learning the practical side at work alongside the theory on your courses means it's so much easier to retain knowledge than at A Levels and Degree.

Everyone has either been through their exams or are studying alongside you so there's so much help available.

There's a strong interrelationship between the different teams at PEM which gives opportunity to further my development.

I am being seconded to the employment tax team which will be a great new experience to improve my professional skills.

### What makes Cambridge a great place to work?

I've grown up in Cambridge so at times I don't fully appreciate it, but it's a really beautiful city! It's also rapidly growing and becoming a real hub for financial industry which makes it an exciting place to work.



### What do you do outside of work?

When we're not in lockdown I'm at my happiest seeing live music, going to football matches, or exploring new cities with friends. I also love a quiet night in watching a film, sewing, or getting lost in a good book.

**Georgia Marshall**  
Trainee Tax Adviser

e. [gmarshall@pem.co.uk](mailto:gmarshall@pem.co.uk)



**PEM**  
Salisbury House  
Station Road  
Cambridge CB1 2LA

t. 01223 728222  
e. [pem@pem.co.uk](mailto:pem@pem.co.uk)



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