



JOB DESCRIPTION

Role: Advisory Manager
Team: Personal Tax, Private Clients

Reporting to: Partner, Director.

Overview of role

Focus will be on assisting partners and directors with the provision of tax advisory letters and reports. The manager will be responsible for drafting letters and reports for the senior team. Managers are responsible to partners for the smooth running of their groups and for ensuring that technical work under their control is carried out in accordance with the firm's high standards and current procedures. Managers are expected to assist partners in meeting the firm's strategic aims, marketing and commercial objectives. Assisting partners and directors in the administration and overall performance of their groups and the affairs of the firm generally to help initiate change and continuous improvement.

Nature of work

Responsible for a small portfolio of clients and for delivering first class advice and service for those clients and PEM staff. A manager must present solutions to increasingly complex technical issues. Reviewing of the team's work and reviewing technical abilities. Working closely with partner and directors with a view to technical and advanced planning for High-Net-Worth Individuals and families. Managers should assist the partner in managing the team, including day to day monitoring of the workloads, work in progress, debtors, training needs and general business development.

Main responsibilities and duties

Technical

1. Acting as personal tax specialist giving advice to clients and PEM staff on various personal tax issues and assignments.
2. Dealing with routine correspondence concerning client's affairs on a timely basis.
3. Reviewing clients' portfolios highlighting opportunities with a view to undertaking higher level reviews.
4. Seen as technical reference point (for private client issues).
5. Assisting partners and directors with detailed advisory and more complex compliance work on assignments when necessary including advisory letters and reports
6. Accurately interprets advice obtained from other specialists and questions where required.
7. Having a comprehensive knowledge of subject, keeping up to date with tax legislation changes, HMRC practices and current tax planning ideas and ensuring appropriate dissemination of such information.
8. Advising on personal wealth management, planning and keeping up to date on relevant techniques and products.
9. Previous experience and expertise in preparing advisory letters and reports for private clients. Sound proven technical knowledge

Managerial

1. Ensuring that compliance work and advisory work is dealt with in accordance with the Tax Department standardisation procedures.



2. Increasing morale in the group including communication to Partners/Director of specific staff concerns.
3. Assisting in the performance appraisal scheme when necessary and identifying staff's strengths and weaknesses and training needs, ensuring formal communication between partners and staff is optimised, including highlighting the future direction of PEM (by group meetings, distribution of literature, etc).
4. Assisting with technical training needs within department as required.
5. Manages work in progress to ensure recoverability targets are met.
6. Monitors debtors in a timely manner to ensure aged debtors do not escalate.
7. Assisting with maintaining group work programmes and monitoring jobs awaiting completion when necessary.
8. Ensuring that own job budgets are completed and compared to actual time, and that explanations are obtained and recorded for any variances. Ensures bills are raised and costs are collected on a timely basis. Meets own financial targets set.
9. Assisting when necessary in keeping control of jobs and WIP within the office.
10. Generally ensuring that firm's quality assurance procedures are maintained and that client care is exceptional.

Commercial

1. Staying up to date on the latest technical developments and what services the competition are offering, and sharing information with the partners and staff.
2. To identify marketing opportunities both for additional services with existing clients and introducing new clients to the firm.
3. Attend marketing events and build own network of referrers in the local market.
4. Help to produce proposals from initial identification to help win new and profitable business.

Client and client service

1. Builds rapport with the individual clients and develops a clear understanding of their expectations.
2. Meets client demands, keeping them up to date with progress and engages trust and respect.
3. Deals with a wide range of technical issues and client situations.
4. Provides intelligent and creative solutions to tax issues both reactively and proactively.
5. Writes high quality tax reports, professionally presented documents, requiring minimal input from partner and directors.

New client / risk management

1. Has sound awareness and adherence to the firm's risk management processes and procedures.
2. Ensures compliance with internal procedures including the completion of new client procedures.
3. Mitigates risk through review and involvement of senior people.

Team work

1. Works effectively with all members of the team, building confidence and respect of peers and subordinates.
2. Share knowledge and information with the team and other groups.
3. Providing on the job training when required.



4. Encourage team members to be positive and to give of their best in line with firm's goals.
5. Mentors the team giving feedback and provides development opportunities.
6. Demonstrates an appetite for self-development through the appraisal process.
7. Reviews work for learning points and client service.

Person specification

Essential

Desirable

CTA

STEP/ACA/ACCA

Post qual experience

Proven Management skills

Specific or general comments

Keep technically up-to-date particularly in those areas in which you and other tax staff are involved daily and maintaining personal CPE records. Continue to gain expertise in other areas such as commercial and personal skills.

Prepared by: NA/SN/TM

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