

JOB DESCRIPTION

Role : Tax Trainee
Team : Private Clients

Reporting to : Tax Advisers/Manager/Partner

Overview of role

This is a training role commencing with the fundamentals of tax compliance progressing through to being able to perform high quality tax compliance and tax advisory work.

Main responsibilities and duties

1. Request client information (either from client or audit team).
2. Generate tax return or computation, assessing impact of each piece of information.
3. Address queries on the return with the client.
4. Pass file to manager/tax advisor for review.
5. Make any amendments required.
6. Send return to client with letter detailing liabilities and any tax saving opportunities.
7. Receive signed return and forward to Revenue within deadline.
8. Liaise with Revenue statement on account.
9. Communicate need to pay to client.
10. Prepare Inland Revenue forms as appropriate and ensure deadlines are met.
11. Assist with preparation of client bill.

Other Responsibilities

1. Regularly update your technical knowledge, via CPD and other suitable opportunities.
2. Positive involvement with tax advisory work relevant to your skill level.

Communications

1. Clients regarding information required, liabilities, deadlines to be met, returns to be signed, tax saving opportunities.
2. Partners regarding getting correspondence signed, escalating client issues.
3. Other tax team members to gain technical support and review.
4. Audit team regarding information on tax computations and other tax issues.

Inland Revenue

1. Problems and issues.
2. Client queries.
3. Issues raised by the Revenue regarding client returns.
4. Managing deadlines.

Decision-making parameters

1. Prioritisation of work.
2. Treatment of items within a tax return.

Qualifications and skills

1. Studying or prepared to study for ATT, followed by CTA, if appropriate.
2. Practical and technical tax knowledge.
3. Basic accounts knowledge.
4. IT packages (Excel, Word). Training will be given on tax specific software.
5. Communication.
6. Organisation and attention to detail.
7. Client focus.
8. Problem solving.

Prepared by : TM

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