Job Description

Job Title: Assistant Director
Location: Cambridge, Cambridgeshire
Department: Private Clients
Line Manager Job Title: Partner

Overview

The Assistant Director works alongside Directors and Partners to deliver high-quality technical tax advice and planning solutions for high net worth individuals and their families. The role is project-based, focusing on advisory and technical work rather than compliance portfolio management. The Assistant Director is expected to produce high level technical advice, to assist with driving business development, mentor junior colleagues, and contribute to the growth and reputation of the private clients department.

Key accountabilities

- Provide complex technical tax advice and advanced planning on income tax, capital gains and inheritance tax to clients and colleagues
- Maintain up-to-date technical knowledge and ensure the firm's quality standards are met. Share technical insights within the team and wider firm
- Identify and help lead new business development and marketing initiatives to attract and retain clients including assisting with proposal documents for new work
- Support Directors and Partners in delivering the department's strategy and managing the team
- Attend client meetings, seminars, and contribute to technical literature and presentations
- Review work prepared by junior colleagues. Supervise and mentor junior colleagues, ensuring effective training ensuring a positive working environment and high morale are maintained.
- Effective management of billing to ensure minimal write-offs, and recoverability, hours and WIP targets are met.
- Ensure chargeable hours, work in progress and recoverability target KPI's are met.
- Ensure compliance with risk management processes, internal procedures and quality assurance standards.

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1875 Accounting Limited t/a PEM.
A full list of Partners can be found on our website.

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Registered Office Address: Salisbury House, Station Road, Cambridge, United Kingdom, CB1 2LA
Country of Registration: England

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Person specification

- CTA qualification is essential. STEP, ACA, or ACCA or equivalent are desirable and may be considered as alternatives.
- Significant experience in private client tax advisory and planning
- Strong technical expertise
- Excellent client care and communication skills
- Ability to develop business and build client relationships
- Demonstrated ability to mentor and provide guidance to junior colleagues, sharing knowledge and expertise in a supportive manner.
- Ability to manage multiple projects and priorities effectively
- Commercial awareness and understanding of market trends
- Commitment to continuous professional development and technical excellence.