Job Description

Job Title: Manager (Advisory)
Location: Cambridge, Cambridgeshire
Department: Private Clients
Line Manager Job Title: Partner

Overview

The Manager is responsible for providing high net worth individuals and their families with high quality personal tax advice. The role supports Partners and directors in achieving the firm's strategic, commercial and operational objectives, including technical excellence, business development, and continuous improvement within the team.

Key accountabilities

- Assist in providing expert personal tax advice to clients and colleagues, including complex technical issues and advanced planning for high net worth individuals.
- Manage a small client portfolio, ensuring compliance, timely correspondence and identification of tax planning opportunities
- Support Partners and Directors in business development, marketing initiatives and the production of proposals for new work
- Review work drafted by other team members and act as a technical reference point for private client tax matters
- Mentor and develop the team, help to identify training needs and fostering a positive working environment
- Ensure compliance with risk management processes, internal procedures and quality assurance standards
- 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.
- Maintain up-to-date technical knowledge and share insights with the team and wider firm.

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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
- Proven technical expertise in personal tax, with post-qualification experience
- Demonstrated ability to mentor and provide guidance to junior colleagues, sharing knowledge and expertise in a supportive manner.
- Excellent communication and client relationship skills, with the ability to deliver high quality written and verbal advice
- Commercial awareness, with the ability to identify business development opportunities and contribute to the firm's growth
- Commitment to continuous professional development and maintaining up-to-date technical knowledge.