Job Description

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

Overview

PEM's Private Client team helps individuals, their families and trusts manage their tax affairs through clear, practical and tailored advice. We assist clients with both compliance and tax planning covering personal taxes, trusts and estates, working closely with them to understand what matters most and support them in achieving their financial goals.

As part of a well-established and growing team, this role offers the opportunity to work on a varied and high-quality portfolio while contributing to the continued development of our Private Client offering. With a team of 35, including 4 partners, the Private Client team offers a strong, collaborative environment with depth of expertise, clear progression opportunities and ambitious plans for continued growth.

This is a role for someone who wants to take ownership, develop their expertise and progress within a team that values technical quality, collaboration and long-term career development. At PEM, progression opportunities are shaped by the firm's continued growth and commitment to building strength across its specialist teams. Our Private Client team is an established and growing team with significant ambition for the future. As part of PEM's wider growth plans, we have clear 2030 strategy and a strong focus on creating progression opportunities for our people as the team expands. This means the role offers not only high-quality and varied work, but also the chance to develop your career in a supportive environment where growth is matched by opportunity.

PEM
Salisbury House
Station Road
Cambridge CB1 2LA

t. +44 (0)1223 728222
e. hello@pem.co.uk

pem.co.uk

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

Company Registered Number: 17014349
Registered Office Address: Salisbury House, Station Road, Cambridge, United Kingdom, CB1 2LA
Country of Registration: England

Regulated for a range of accounting and investment business activities in the UK by the Institute of Chartered Accountants in England and Wales. PEM Insolvency Practitioners are licensed to act in the UK by the Insolvency Practitioners Association and when acting as receiver or administrator contract without personal liability.

Key accountabilities

- Effectively managing a portfolio of clients ensuring that all relevant compliance deadlines for both trusts and individuals (income tax and IHT) are met.
- Managing casework efficiently including delegation to, and training of, colleagues.
- Assisting partners and directors with advisory projects including setting up and closing trusts.
- Attending client meetings as required.
- Assisting with estate administration including preparation of probate application, estate accounts and IHT returns.
- Keep abreast of the latest technical developments, and new areas within the Trust arena. Share knowledge, attend relevant events, and read industry journals.
- Identify and convert marketing opportunities, including offering additional services, to new and existing clients. Assist in preparing fee quotes for new work.
- Maintain and provide the highest standards of client care.
- Ensure accurate and prompt billing and proactive debt collection.

Person specification

- Relevant demonstrable experience gained within trust and probate professional services. Formal qualifications are not necessarily required but CTA, STEP or CILEX considered a bonus.
- Excellent knowledge and experience managing personal and trust compliance (accounts, income tax returns and IHT returns), TRS reporting, estate accounts and tax returns and ideally probate work.
- Experience in advising onshore trusts. Offshore trust experience would also be helpful.
- Encouraging and motivational to train and develop team members.
- Excellent communication skills with the ability to build positive relationships across all levels of the organisation and clients.
- Proficient attention to detail to ensure accuracy.
- Ability to balance multiple priorities and deliver to strict timelines.