

JOB DESCRIPTION

Role : Tax Compliance Processor (Private Client)
Team: Private Client Tax Team

Reporting to : Managers

Overview of role

Working closely with other members of the Private Client team, the focus of this role is to provide tax return data processing for the compliance team.

You will provide efficient and accurate tax return processing working directly with other team members who will provide training. No prior experience is required.

This is a busy and varied role requiring attention to detail and accurate data entry.

Main responsibilities and duties

Assisting the Private Client team to ensure first class data entry and tax return processing to assist in the preparation of clients' annual tax returns.

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1. Assist in requesting client information (either from client or audit team).
2. Generate tax return, assessing impact of each piece of information.
3. Pass file to manager/tax advisor for review.
4. Make any amendments required.
5. Sending tax returns to clients with letter detailing liabilities and any tax saving opportunities.
6. Communicate need to pay tax to client.
7. Prepare HM Revenue & Customs forms as appropriate and ensure deadlines are met.
8. Assist with preparation of client bill.

Qualifications and skills

1. Good communication skills.
2. Organisation and attention to detail.

General Comments

This is a busy and varied role working within the Private Client department. The ideal candidate is an energetic individual with strong knowledge of Microsoft Office suite (Word and Excel) and an eye for detail. You will require excellent communication skills and the ability to manage varied assignments.

Prepared by : NA/TEM

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