

JOB DESCRIPTION

Job title	Assistant Manager 2
Location	Station Road, Cambridge
Department	Private Clients
Line manager	Manager

Overview

The role has responsibility for a portfolio of clients, and for delivering first class advice and service to those clients as well as PEM colleagues. Assisting where appropriate in reviewing work prepared by the team, including compliance and advisory work.

Key accountabilities

- Managing a portfolio of compliance cases effectively.
- Acting as a private client tax specialist giving advice to clients and other PEM groups on private client tax issues, both straightforward and more complex.
- Maintaining and developing more advanced knowledge of private client tax, keeping up-to-date with tax legislation changes and assisting with dissemination of such information to colleagues.
- Meet client needs, keeping them up to date with progress and maintaining trust and confidence.
- Reviewing work performed by colleagues under your supervision, prior to senior colleague review.
- Dealing with correspondence concerning client's affairs on a timely basis.
- Assisting senior colleagues with detailed and more complex work including drafting advisory letters and reports.
- Management of billing to ensure minimal write-offs and work in progress to ensure recoverability targets are met.
- Ensure chargeable hours, work in progress and recoverability target KPI's are met.
- Identify marketing opportunities where appropriate, both for additional services with existing clients and introducing new clients to the firm.
- Provides intelligent and creative solutions to tax issues proactively, pre-empting the client's needs.
- Ensure compliance with internal procedures, setting a good example to junior colleagues.
- Work collaboratively with all members of the team, building confidence and respect of peers and junior colleagues. Training new team members and effectively delegating work to tax trainees and processors.
- Continue to building up a professional network of clients and contacts.

Person Specification

- ATT and CTA qualified
- Good compliance and technical knowledge, including producing advisory documents.
- Excellent communication skills
- Experience of mentoring a small team
- Professional attitude, ensuring PEM values are maintained and promoted at all times
- Proficient at all Microsoft Office apps, specifically, excel, word and PowerPoint, together with case and document management systems (CCH, FibreCRM, Intapp etc)
- Ability to juggle multiple priorities and plan work effectively
- Excellent time keeping and time management skills