

Job Description

Job vacancy:	Head of Private Client Tax
Reporting to:	Head of Office
Base:	Bath
Annual salary:	c£60,000 to £70,000 depending on experience
Package:	25 days annual leave 4 x salary life assurance Group Income Protection Scheme Group Personal Pension Scheme

Job Purpose:

- To develop and grow the Private Client Tax (“PCT”) business, managing the day to day and specialist operations of the team and a key portfolio of tax clients, ensuring that budgeted targets are met through existing client and a network of business referrers.

Key Responsibilities:

Business Development

- Agree and drive-forward the local new business marketing strategy for PCT, in liaison with the Marketing Department, to include networking, corporate events, PR, advertising etc, with a view to achieving the annual new business budget.
- Undertake regular networking activity to raise the profile of Target within the local business and professional communities.
- Develop a network of business referrers and intermediaries and ensure leverage is maximised for the PCT department and the office.
- Win new work for Target through the delivery of direct pitches, and giving direction to others in line with Target approach and budgeted expectations.
- In conjunction with other PCT SLHs, ensure a consistent approach to the commercial aspects of dealing with clients including cross-selling, quoting and pricing.

Department

- Project and agree the overall annual budgets for PCT with the Group Head of Tax Operations
- Set and continually review high technical standards within the PCT team.
- Establish and regularly review systems to ensure GRF and projects are scheduled, monitored and completed on time, within budget and to an appropriately high technical standard.
- Liaise with other departments to ensure transparent charging, clear monitoring and controls for the delivery of work.
- Lead, motivate and performance manage the team, providing technical coaching and organising training to enable them to deliver their objectives and meet their career expectations.

Account Manager

- Lead the planning and delivery of larger or more complex tax assignments and transaction support engagements coordinating all relevant input to meet client needs, compliance standards and budget.
- Identify additional business opportunities from existing clients, obtain referrals and deliver projects to achieve income targets.
- Create good working relationships with other departments to generate new business opportunities and ensure client needs and budgets are met.



Key Relationships:

- Group SLHs
- PCT SLHs
- Audit & Advisory team
- BS and other Tax teams
- Clients
- Intermediaries

Decision Making:

- Delivery of account manager and PCT overall team targets.
- Resourcing recommendations.

Problem Solving:

- Introduce and regularly review systems and processes to ensure delivery of team targets.
- Manage team responsibilities and client demands on time
- Ensure the PCT team consistently deliver high quality technical work and recognize the importance of a holistic approach to client needs.
- Resolving client relationship issues.
- Identifying new ways of generating new business.

Experience:

- CTA/ACA qualified or equivalent and continuing CPE
- Normally at least 3 years post qualification relevant experience in a private client tax environment, preferably with management experience.

Skills, Knowledge and Competencies:

Interpersonal

- Client focus
- Initiative
- Management control
- Solution focused
- People development
- Relationship building
- Team working
- Risk awareness

Technical

- Income tax (advanced knowledge)
- IHT and CGT (advanced knowledge)
- Technical knowledge of tax based financial products to assist in cross selling of product
- Tax planning experience
- Corporation Tax (basic)
- Presentation skills

Measurement Data:

- Achievement of account manager and PCT team targets.
- Client feedback and retention.
- Account Manager feedback
- Referrals.
- Cross sales.
- Growth in GRF and projects.

