Target
Chartered Accountants

Job Description

Job vacancy:	Tax Administration Assistant
Reporting to:	Senior Tax Manager
Base:	Bath
Annual salary:	Depending on experience
Package:	23 days annual leave 4 x salary life assurance Group Income Protection Scheme Group Personal Pension Scheme

Job Purpose:

To provide comprehensive administrative support to Private Client Tax (PCT) and Corporate & Business Tax (CBT) working flexibly to maximise efficiency and effectiveness of its administrative systems and procedures.

Key Responsibilities:

- Provide administrative assistance to tax teams including co-ordinating requests to clients for information, receipt and logging of same, generating requests for missing information and following up with clients etc.
- Act as an ambassador for Target at all times in terms of appearance, personal administration and client care in order to enhance the group's reputation and business opportunities.
- Maintain and update the client data base in Pertax/Alphatax/Practice Engine to ensure accurate and timely client information.
- Generating monthly reports from Pertax/Alphatax of activity, deadlines etc to support management review of business progress.
- Administer receipt and flow of referrals from contacts in order to ensure accurate information against departmental targets.
- Prepare standard letters, PowerPoint presentations, copying, scanning, binding, referencing etc to optimise use of team member's time.
- Preparing and printing final letters of a more complex nature.
- Prepare new client forms and collate money laundering information to ensure adherence to legal requirements.
- Administer the annual return process taking responsibility for all tasks such as return filing and debt management, as well as Companies House downloads.
- Prepare new client engagement letters, forms 64/8's, requests for professional release etc and dealing with the disengagement procedure including preparation of lost client forms and general typing as requested.
- Dealing with changes of address for Practice Engine, Pertax and Alphatax.
- Assemble information to send to successor firms for lost clients.
- Take phone calls and messages for any team member, if not available, and preparing a note of caller's request/message.
- Assist local SLH's with their diary management, arranging client meetings, in-house meetings, conference calls, restaurant bookings, external meeting room bookings, DPR meetings, travel arrangements and reminder systems.
- Manage course bookings in accordance with standard procedures, liaising with line managers and Alison Grady, then distributing/collating/forwarding course evaluations for group recording and evaluation.
- Assist with updating and maintaining pipeline for CBT/PCT with input from team members.
- Assist with updating monthly fee forecasting with input from team members.
- Maintain and update HMRC enquiry spreadsheet.

Key Relationships:

- Clients
- Service Line Heads
- TFM
- London Support Team
- Group Operations
- All staff

Decision Making:

- Prioritise completion of workloads
- Methods of diary management

Problem Solving:

- Identifying systems to improve admin system effectiveness and accuracy
- Prioritising workloads

Experience:

- GCSE/ O level in English and Maths or equivalent
- Intermediate/Advanced IT skills in Outlook, Word, Excel, PowerPoint, Retain, Pertax and Practice Engine
- Audio Typing preferred

Skills, Knowledge and Competencies:

- Client focused
- Polite & helpful
- Team player
- Initiative
- Attention to quality
- Enthusiastic and willing

Measurement Data:

- Accuracy of typed documents
- Absence of work backlog
- Ideas to improve admin systems
- Client and internal feedback
- Staff and line manager feedback