

Armstrong Watson – Job Description

Job Title:	Trainee Tax Compliance Assistant
Reports to:	Tax Compliance Manager

1. Job Purpose:

To carry out tax compliance work on a varied portfolio of clients, including accounting clients, company directors and private clients.

2. Relationships and Context

- Tax Compliance Manager / Tax Compliance Colleagues;
- Internal Accounts Colleagues;
- Firm Clients;
- External Organisations, including HMRC.

3. Principal Accountabilities / Responsibilities:

Job Management

- Effectively managing the balance between your classroom study and on the job learning, giving full commitment to both;
- Diligently working through your training plan over a three year period to ensure successful completion of your ATT qualification alongside development of your tax compliance knowledge and skills;
- Being responsible for entering tax information into the relevant sections of our tax software ready for review by a Tax Compliance Manager. As you progress, in a full tax year this will equate to data entry for up to 750 simple personal tax returns. Any complex areas will require assistance from a Tax Compliance Senior / Tax Compliance Manager;
- Using technical tax knowledge to identify issues for review stage;
- Meeting with clients who drop off tax records in the local office;
- Sending reminders to clients of required / missing information;
- Completing electronic submission of returns to HMRC;
- Agreeing HMRC correspondence including statements of account, coding notices and repayment notices to our tax software;
- Following internal processes to ensure our checklists and work tracking software is kept up to date;
- Liaising with internal colleagues on job progress and tax payments;
- Using technical tax knowledge to liaise with internal colleagues on matters affecting tax returns and dealing with basic queries from clients;
- Reporting any HMRC compliance enquiry notices to the Tax Compliance Manager;
- As you progress, taking ownership of a tax return portfolio - chasing the relevant internal colleagues and clients to ensure missing information is obtained and all returns in portfolio are submitted to HMRC by the filing deadline;
- Completing any other general administrative duties in the Tax Compliance team, as and when required.

Client, Internal and External Organisational Contact

- Returning phone calls and written correspondence within required deadline and ensuring

promises are kept;

- Identifying issues relevant to clients and ensuring these are brought to the attention of the Tax Compliance Manager.

Internal Financial Management & Business Planning

- Understanding and working proactively towards achieving own contribution to the Tax Compliance business plan;
- Managing own time on client's tax affairs in the most efficient manner and in accordance with any budgets set, and raise any concerns about possible overruns with line manager in a timely manner.

New Business Development

- Actively endeavour to make non clients aware of the services and benefits that Armstrong Watson can provide;
- Provide relevant information to other internal specialists, so as to assist the cross selling of services into the client base.

This job description is not an exhaustive list of all responsibilities and skills associated with the job, but rather an indication as to the core of the position. The post holder may perform other duties and responsibilities as required.

We also expect candidates who are employed in this post to be able to evidence competency in line with our behavioural competencies list / document (which can be accessed from Jostle or by a member of the Recruitment Team upon request).