

Armstrong Watson – Job Description

Job Title:	Tax Compliance Manager
Reports to:	Group Tax Compliance Manager / Accounting Partner

1. Job Purpose:

To manage own portfolio of tax clients together with the workflow of their team, providing an excellent client service experience whilst maximising efficiency and helping to creating new business opportunities.

2. Relationships and Context

- Tax Compliance Colleagues;
- Internal Accounting Colleagues;
- Own client portfolio for ongoing management and development;
- Partners and employees who are key stakeholders in client work;
- Intermediaries such as banks and solicitors;
- Government bodies and external organisations such as HMRC, ICAEW and software suppliers.

3. Principal Accountabilities / Responsibilities:

Job Management

- Being responsible for entering tax information into the relevant sections of our tax software ready for issue to client without a review. In a full tax year this will equate to data entry for a mixed portfolio of up to 250 complex personal tax returns;
- Dealing with complex areas within their portfolio, including Profit Sharing, Farmers Averaging claims, CGT Computations, Pension Planning, Loss Relief claims, Foreign Income etc;
- Reviewing tax returns prepared by Trainees, Assistants and Seniors;
- Reviewing these tax returns in appropriate depth according to the level of colleagues who have prepared. In a full year this will equate to reviewing up to 1,500 personal tax returns;
- Providing support and training to Trainees, Assistants and Seniors with queries;
- Meeting with clients in the local office, where required;
- Liaising with HMRC and clients in respect of compliance enquiry notices;
- Taking ownership of and monitoring tax compliance team portfolio – ensuring progress on tax returns is made and that all tax returns in the team portfolio are submitted to HMRC by the filing deadline;
- Planning, prioritising and allocating all relevant client work ensuring effective team workflow;
- Proactively manage efficiency in work practices so as to maximise recovery;
- Effectively lead briefings to tax team prior to undertaking work;
- Have positive involvement in weekly pulse meetings, including taking ownership for weekly and quarterly actions to drive team performance.

Client, Internal and External Organisational Contact

- Returning phone calls and written correspondence within required deadline and ensuring promises are kept;
- Ensuring adequate contact availability for clients, Armstrong Watson staff and external organisations with self and team members as appropriate;
- Proactively updating and engaging with the accounting teams on a weekly basis to drive progress on tax return work;

- Proactively contact clients when items of interest or benefit to the client arise.

Leadership, People Management and Development

- Ensuring the defining and the agreement of formal objectives for all direct reports;
- Monitoring individual and team performance, versus original objectives and departmental KPIs accordingly;
- Providing regular feedback to all team members on their performance via '1-1' meetings;
- Conducting regular assessments of each team member's competence, motivation and required support / resources, and where 'gaps' versus the job specification are observed, take specific action to rectify via the creation of a personal development plan;
- Conducting formal appraisals versus original objectives and job specification for each direct team member in line with continuous review process;
- Providing input into overall departmental training programme via provision of content where required.

Internal Financial Management & Business Planning

- Understanding and working proactively towards achieving the departmental business plan;
- Managing the time spent by their whole team on client's tax affairs and ensure work is completed in the most efficient manner;
- Providing tactical input into departmental business plan as required;
- Where team performance is at or above target, ensure this is communicated to own team and that success is celebrated;
- Where performance is below target, encourage and instigate remedial action to rectify and improve performance.

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;
- Assisting with business development events as required;
- Identifying the needs of clients, and pro-actively develop new business opportunities for Armstrong Watson;
- Forming good professional relationships with clients and intermediaries, creating an environment whereby they feel happy to refer their contacts to Armstrong Watson;
- Feed into the business development strategy to win new work for the Tax Compliance team.

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).