Armstrong Watson – Job Description

Job Title:	Tax Manager (Private Client)
Reports to:	Tax Director / Tax Partner

1. Job Purpose:

- To assist with the delivery of pro-active tax planning advice for our clients.
- To specifically support the Private Client Tax Partners / Tax Directors & Tax Senior Managers.

2. Relationships and Context

- Tax Consultancy team;
- Tax Compliance team;
- Accounting Colleagues;
- Financial Planning Consultants;
- Clients;
- Government bodies such as HMRC and other relevant external organisations;
- Other specialists, including sector specialists (such as agriculture).

3. Principal Accountabilities / Responsibilities:

Job Management

- Being responsible for managing the workflow on matters involved in - including monitoring the work progress and ensuring appropriate levels of communication with all clients and internal stakeholders on progress for each piece of client work;
- Being responsible for the drafting of technical advice and delivery of private client advisory projects;
- Supporting clients with their ongoing compliance needs, as appropriate to the role;
- Dealing with adhoc queries from the wider business;
- Keeping up to date with taxation legislation and identify potential issues, bringing those issues to the attention of the Tax Director / Tax Partner as appropriate;

Client, Internal and External Organisational Contact

- Being responsible for managing communication with the Tax Partner or relationship manager responsible for each client;
- Having direct client contact on advisory projects;
- Being responsible for communicating progress to client relationship managers in other service lines where appropriate;
- Providing informal coaching and ensuring technical development of junior team members.

Leadership, People Management & Development

- Providing training and mentoring for Tax Assistants, Tax Seniors and Tax Assistant managers;
- Delivering training to other service lines on specific technical areas;
- Managing other members of the team, as appropriate for the role.

Internal Financial Management & Business Planning

- Managing own time recording and submission of timesheets on time;
- Onboarding new clients and ensuring the appropriate risk management documentation is in place on all matters;
- Monitoring of WIP, recoveries and billing for advisory matters involved in.

New Business Development

- Identifying planning and advisory opportunities from the firms' client portfolio;
- Supporting Senior team in marketing and BD initiatives including proposal documents.

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).