**SENIOR TAX ASSISTANT (PERSONAL TAX)**

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| **Job Title** | Senior Tax Assistant  |
| **Salary Scale**  | Competitive, dependent on experience  |
| **Working Pattern** | Full time: 9am – 5pm, Monday to Friday  |
| **Reports To** | Tax Manager  |
| **Job Purpose** | To advise individuals and Trustees on income and capital gains tax matters and possible tax planning opportunities.To ensure compliance with all legal and regulatory requirements. |
| **Management Responsibility for** | None  |

**Main Duties and Responsibilities**

* Managing a portfolio of clients including collating and processing tax information, preparation of personal tax returns; computation of tax liabilities; trust taxation; managing the process through to submission of tax returns; and providing tax advice for matters arising from the portfolio
* Collating information from ‘in-house’ records or other sources
* Work closely with colleagues in the Tax Group on all client matters, providing support and assistance to colleagues
* Maintaining regular contact with clients in order to obtain information and provide advice on any difficulties with tax return
* Attend meetings with existing clients and potential new clients
* Dealing with HMRC compliance checks, ensuring prompt and full responses
* Liaising as necessary with external asset management companies
* Taking a proactive approach to managing clients and identifying their tax and legal requirements
* Keeping internal control records up to date and ensuring compliance with quality control procedures
* Build good relationships internally and provide assistance and support on tax matters and technically challenging tax areas
* Proactively manage your own caseload and provide an excellent client service
* Supporting the firm to achieve its strategic and commercial objectives
* Meeting financial targets in relation to the Tax Group.
* Take part constructively in the performance review process and undertake agreed training and development activities
* Adhere to firm processes in relation to financial policies, time recording and AML compliance.

**Person Specification**

**Essential**

* Previous experience of working in a similar role
* Highly motivated and committed to delivering an excellent level of service to clients and colleagues
* Excellent attention to detail and the ability to deal with competing priorities and deadlines
* Excellent interpersonal skills, both written and oral
* Ability to work independently as well as part of a team, delegating to and supporting colleagues
* A commercial focus in managing workload effectively and efficiently
* Able to build professional relationships with clients and third parties
* Strong working knowledge of Microsoft Office applications including, Word, Excel and Outlook.

**Desirable**

* Experience in Executry taxation;
* Previous experience in a legal environment;
* Experience in using CCH.

If you wish to apply for this role, please send your CV including your salary expectations, via e-mail to recruitment@murraybeith.co.uk