Personal Tax Client Manager

What we do

We are a financial Professional Services firm, committed to giving our clients a simple and straightforward experience and ensuring they get the sophisticated financial outcomes they want.

For businesses we provide tax, accounting and financial planning; for individuals we provide wealth management and tax planning services; and for others we provide support through our charitable foundation.

Advance your career with us

We're a rapidly expanding company with exciting plans for the future. We value ambition, and nurture it in a friendly, positive place to work – where efforts are recognised, and every opinion counts.

Our staff enjoy remote and flexible working arrangements with access to our Team Hubs in London, Sussex and Chandigarh. We stay connected with regular social events for the whole company and individual teams.

What you'll do

The Personal Tax Client Manager sits within the Accounting and Financial Management group and is responsible for managing a team of experience Tax Seniors. They will also be expected to be client facing, advising on a broad range of tax issues.

Main Roles and Responsibilities

- Dealing with technical and planning queries
- Managing a portfolio of Personal Tax clients
- Ensuring that the compliance and administrative procedures are fully complied with for all tax work in the portfolio
- Preparing and delivering internal training as and when required
- Reviewing all work produced by the team
- Manage the fast-track Personal Tax Senior effectively

Oversight and delivery of accounting work

- To achieve optimal tax efficiency for our clients
- To present small company, partnership and sole trader accounts and tax returns
- To be responsible for client relationships with IT contractors, partnership, sole traders, and Ave Net Worth individuals

Leading on Business Development opportunities

The Personal Tax Client Manager will be expected to drive business development in their portfolio. This will include the following:

- Building a deep understanding of the client and their ambitions and strategies for the business
- Identify opportunities for cross selling services
- Coordinate with the Tax Planning Manager for additional fee earning opportunities
- Speak to and obtain referrals from each client
- Overseeing administration for new and current engagements

What are we looking for?

The ideal candidate will be:

- a confident communicator with a natural ability to build and manage client relationships.
- extremely numerate and have a broad technical understanding across the accounting and tax skill set
- able to demonstrate an ability to take initiative, work with minimal guidance and have a track record of improving the product and service they deliver.

Specific Requirements:

- ACA/ACCA/CTA Qualified or part-qualified
- Demonstrate financial and commercial acumen to not overrun on fees
- Be pragmatic and diplomatic
- Be able to multi-task needs of different partners across the business
- Have experience of working with owner-managed clients
- Have superb client liaison skills
- Have strong management skills

What we offer:

- A competitive basic salary, dependant on experience and qualifications.
- Pension scheme
- A pre-existing base of client opportunities
- Funded first attempt at relevant industry qualifications
- A hybrid balance of an office base and the opportunity to work productively from home

References:

This role will be subject to satisfactory credit and DBS checks as well as employer and personal references on request.

Next steps

We welcome applications from positive, dynamic, professional, and driven individuals with a passion for great client service. To apply please share your CV and our team will be in touch as soon as possible.