David Allen

Job Description

Name	
Job title:	Tax Manager
Department	Tax Compliance
Line Manager	Tax Partner
Line management responsibilities:	Tax Seniors and Tax Assistants

Aims and purpose of the job

To lead and develop a high-performing Tax team that delivers technically excellent advice and outstanding client service. The Tax Manager will take ownership of a portfolio of clients, manage team capacity and workflow proactively, develop colleagues and identify opportunities to improve, grow and strengthen the Tax department and wider David Allen business.

Key responsibilities

Client Portfolio, Tax Compliance and Planning

1.	• Manage a portfolio of clients and prepare Self-Assessment and Capital Gains Tax returns, ensuring work is accurate, technically robust and compliant with relevant legislation and business systems, including APS, Virtual Cabinet and Digita. • Develop practical tax-planning solutions in relation to Capital Gains Tax, Inheritance Tax, Trusts and Estates and other relevant matters. • Manage HMRC enquiries and ensure response are accurate, timely and appropriately evidenced.

Technical Quality and Client Service

2.	• Maintain up to date technical knowledge and provide accurate, comprehensive advice to clients and internal stakeholders. • Ensure all work and communications are competed promptly and to a consistently high professional standard. • Plan, manage and prioritise personal workflow, budgets and productivity so that targets and deadlines are achieved.

People and Line Management

3.	• Lead, support and develop Tax Seniors and Tax Assistants, creating a high performing and collaborative team. • Delegate work effectively and support senior colleagues with technical queries where required. • Conduct appraisals and performance reviews, agree clear objectives and maintain meaningful development plans. • Complete relevant people management administration, including approving timesheets and holiday requests and conducting return to work meetings.

Workflow, Performance and Resource Management

4.	• Manage team workflow, capacity, deadlines and resource allocation proactively to ensure work is delivered efficiently and to a consistently high standard. • Monitor budgets, productivity and recover, aiming to achieve a minimum recovery rate of 95% were applicable.

Department Development and Continuous Improvement

5.	• Use technology effectively and identify opportunities to improve systems, processes and ways of working, enhancing efficiency, quality and client experience. • Identify and implement opportunities to develop the department, including delivering relevant technical and operational training. • Support the Tax Partner and Tax Consultants with ad hoc work and projects as required.

Business Development and Profile Raising

6.	• Prepare topical tax content, technical articles and press material for publication through appropriate media. • Support business development and promotion by attending relevant events including networking events and agricultural shows. • Represent and promote the Tax team and wider business professionally, building positive internal and external relationships.

Public Relations

7.	• Prepare technical articles for publication through various media. • To support with business development and promotion as required, such as through attending events (including networking or agricultural shows) or through writing articles.

Central Duties

8.	• To represent the business when required to ensure positive links, relations and networks. • To show a commitment to equality, diversity and inclusion (EDI). • To undertake personal development necessary to ensure effective performance in the role. • To participate in relevant and appropriate training and development as required. • To demonstrate the David Allen values of ambition, professionalism, knowledge, integrity, and respect in the work you do and during your appointment.

Method of working

The David Allen Group expects all staff to work effectively, both as individuals and as part of a team, delivering high quality services and support to clients and staff. In doing so, the company expects all staff to display all of the core competencies as defined in the performance and development appraisal arrangements and to conduct themselves in a manner which befits their professional status and responsibilities.

Public relations

Considerable importance is attached to the role the business plays in its various communities. It therefore follows that all staff are expected to work to maintain and develop these relationships at every opportunity by positively promoting the work of the business and the role it can play in supporting the aims of its stakeholders.

General Statement

This job description is a guide to the work the post holder will be required to undertake. In consultation with the post holder, it may be amended from time to time by the line manager to meet changing circumstances or business needs. Specific targets and objectives will be agreed with the post holder and will be reviewed regularly as part of the performance management arrangements.