David Allen

Person Specification – Tax Manager

The following qualifications, knowledge, experience, skills and behaviours are required for the role.

	Essential	Desirable
Education and Professional Qualifications		
Five GCSEs at Grade A*-C (9-4), including Maths and English, or equivalent.	*	
ATT or CTA qualified, or able to demonstrate an equivalent level of technical knowledge and experience.	*	
Technical Knowledge and Experience		
Substantial recent experience in personal tax compliance and advisory work within an accountancy practice or comparable professional environment, normally gained through at least five years' relevant experience.	*	
Strong technical knowledge of personal tax compliance and planning, including Capital Gains Tax, Inheritance Tax, Trusts and Estates.	*	
Experience of managing a portfolio of personal tax clients and reviewing complex Self Assessment and Capital Gains Tax work.	*	
Experience of managing or supporting HMRC enquiries.	*	
Commercial awareness, including the ability to manage budgets, productivity, recovery and client service expectations.	*	
Knowledge of Digita tax-production software, APS and Virtual Cabinet.		*
Competent in Microsoft 365 applications, including Word, Excel and Outlook.	*	
Leadership, Management and People Development		
Demonstrable experience of leading, motivating and developing a team.	*	
Experience of managing performance, setting objectives and providing constructive feedback.	*	
Strong workflow, resource and capacity-management skills, with the ability to manage competing deadlines.	*	
Ability to delegate effectively, support colleagues and hold people accountable for agreed work and deadlines.	*	
Ability to coach colleagues and develop their technical capability, confidence and ownership.	*	
Skills, Behaviours and Personal Qualities		
Excellent written and verbal communication skills, with the ability to adapt communication to different audiences.	*	
Strong analytical and problem-solving skills, with consistent accuracy and attention to detail.	*	
Ability to work effectively both independently and collaboratively.	*	
Professional judgement and the ability to respond constructively to challenge.	*	
Ability to build effective relationships with clients, colleagues and relevant external contacts.	*	
Commitment to equality, diversity and inclusion.	*	
Ability to demonstrate behaviours consistent with the David Allen values of ambition, professionalism, knowledge, integrity and respect.	*	

	Essential	Desirable
General Requirements		
Ability to travel between the firm's offices and to client premises or other work-related locations when required.	*	