David Allen

Job Description

Name:	
Job title:	Tax Training and Development Manager
Department:	Tax Compliance
Line Manager:	Tax Partner
Line management responsibilities:	Yes

Aims and purpose of the job

Lead the recruitment, onboarding, training and development of apprentices and trainees within the Tax Compliance department, ensuring that development needs are met and work is completed to a consistently high technical standard. The role will also manage a specified client portfolio, allocate and review work, support effective performance and promote understanding of the Tax team and its services across the wider firm.

Key responsibilities:

Apprentice Recruitment and Onboarding

1.	• Work with the HR team to recruit and onboard ATT apprentices and other Tax trainees. • Coordinate the onboarding of apprentices and trainees, ensure each new starter receives a structured and effective introduction to the firm and the Tax team. • Complete and coordinate the forms and records required for apprentices to participate in the relevant study programme, including enrollment and progress reviews.

Training and Professional Development

2.	• Work with the HR team and relevant manager to prepare and deliver structured training and development plans for apprentices and trainees. • Identify when errors or quality concerns indicate a training need and provide timely, practical support to address it. • Maintain and develop personal technical knowledge so that apprentices and trainees receive accurate, current and effective guidance. • Lead inductions for tew Tax team members and champion the Tax team across the wider firm, helping all new starters understand its role, services and expertise and how to engage effectively with the team.

Client Portfolio and Technical Review

3.	• Manage a specified portfolio of clients and allocate Self-Assessment and Capital Gains Tax returns to appropriate junior team members. • Review work prepared by apprentices and trainees, ensuring it is accurate, technically robust and compliant with relevant legislation and business systems, including APS, Virtual Cabinet and Digita. • Support apprentices and trainees in managing HMRC enquiries and developing sound technical judgement. • Communicate effectively with clients in relation to personal assignments and work delegated to apprentices and trainees, consistently providing a high standard of client service.

People and Line Management

4.	• Line manage Tax apprentices and trainees, providing clear direction, regular feedback and appropriate support. • Conduct monthly probation reviews for new team members where applicable. • Prepare for, record and conduct performance and development appraisals. • Review and approve timesheets, glide time and holiday requests while maintaining appropriate staffing levels. • Conduct return to work meetings and complete the relevant record following employee absence.

Workflow, Performance and Resource Management

5.	• Maintain regular communication with the team to understand work progress, priorities and emerging issues. • Manage and motivate apprentices and trainees so that work is completed efficiently and in line with agreed deadlines and budgets. • Monitor recovery and aim to achieve a minimum recover rate of 95% where applicable.

Department Development and Continuous Improvement

6.	• Identify and implement opportunities to improve the apprentice and trainee experience, departmental processes and operating efficiency. • Support the Tax Partner and wider management team with relevant projects and ad hoc work.

Business Development and Profile Raising

7.	• 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.

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.