David Allen

Person Specification – Tax Training and Development 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 qualified, or able to demonstrate an equivalent level of relevant personal tax knowledge and experience.	*	
CTA qualified or working towards CTA qualification.		*
Commitment to maintaining current technical knowledge and supporting the professional development of others.	*	
Technical Knowledge and Experience		
Strong working knowledge of personal tax compliance, including Self Assessment and Capital Gains Tax.	*	
Experience of preparing and reviewing personal tax returns and providing clear, constructive technical feedback.	*	
Experience of managing a client portfolio and communicating directly with clients.	*	
Knowledge of HMRC enquiry processes.	*	
Knowledge of Digita, APS and Virtual Cabinet, or the ability to become competent in the firm's systems quickly.		*
Competent in Microsoft 365 applications, including Word, Excel and Outlook.	*	
Leadership, Management and People Development		
Demonstrable experience of coaching, training or developing colleagues.	*	
Ability to assess development needs and translate them into structured, practical training plans.	*	
Experience of reviewing work and providing clear, constructive and appropriately challenging feedback.	*	
Ability to manage performance, set expectations and hold supportive but effective development conversations.	*	
Strong workflow, resource and capacity-management skills.	*	
Ability to build effective working relationships with apprentices, trainees, managers, HR colleagues and external training providers.	*	
Experience of line-managing apprentices, trainees or early-career colleagues.		*
Experience of supporting professional study programmes, including enrolment, progress reviews and liaison with training providers.		*
Experience of recruitment, induction or probation management.		*
Skills, Behaviours and Personal Qualities		
Confident presentation and facilitation skills, with the ability to deliver engaging induction and training sessions to different audiences.	*	
Ability to explain technical tax matters clearly to people with different levels of knowledge and experience.	*	
Ability to represent and promote the Tax team positively across the wider firm.	*	
Strong analytical and problem-solving skills, with consistent accuracy and attention to detail.	*	

	Essential	Desirable
Ability to plan and prioritise competing assignments and meet agreed deadlines.	*	
Professional judgement and the ability to respond constructively to challenge.	*	
Commitment to equality, diversity and inclusion.	*	
Ability to demonstrate behaviours consistent with the David Allen values of ambition, professionalism, knowledge, integrity and respect.	*	
General Requirements		
Ability to travel between the firm's offices and to client premises or other work-related locations when required.	*	