

ROLE PROFILE	
Job Title:	Assistant Manager
Reports To:	Associate Director
Department:	Tax

Purpose:

To provide support to the organisation's growing tax department. Their role is a combination of administrative assistance and tax support. They must be able to perform higher level functions such as processing tax returns and maintaining databases and well as assisting with policies and procedures. They must have a good general knowledge of Jersey and UK tax for individuals, trusts and companies. This includes the distribution rules for Jersey companies, Jersey tax for trusts and individuals, value added tax, non-resident landlords, trust and estate income tax, capital gains tax, inheritance tax, annual tax on enveloped dwellings.

The Assistant Manager will work under the supervision of the Associate Director but many of their administrative duties are performed with little or no supervision. They should be self-motivated and comfortable working independently. They must also be able to work closely with the Associate Director and have the ability to be able to train, coach and develop junior members of the team.

The position offers the opportunity to manage their own small portfolio, to assist and develop their knowledge by working closely with the Associate Director on the larger mixed and growing portfolio of UK and Jersey clients to include local traders, high net worth individuals, offshore trusts and UK property holdings structures and to assist and develop others.

The career offers opportunities to study for relevant professional qualifications and learning the roles and responsibilities from more senior employees to enable them to progress over time.

Responsibilities:

Providing assistance with the processes around client take on, data collection/information gathering, preparing tax computations and tax returns, billing, business development and opportunities for growth and may include some or all of the following functions:

- Maintaining accurate and complete records;

- Assisting with various reconciliations;
- Assisting with proposals for new engagements;
- Assisting with reviewing of WIP on a regular basis so advance discussions can be held with the clients where work falls outside the scope of fixed fee arrangements, to discuss with management and ensure special bills are raised where appropriate;
- Maintaining a good understanding of local and UK tax legislation changes;
- Work diligently within the best of your ability to ensure you meet the requirement of your job description;
- Seek to continuously improve in order that the practice delivers the best possible service;
- Participate in internal/external meetings and training as required;
- Positively participate in one to ones and appraisal;
- Ensure that all relevant policies, procedures and working practices are adhered to at all times;
- Work in accordance with our culture, values, aims and objectives;
- Act as a positive ambassador for Bracken Rothwell Limited at all times when dealing with clients or representing the business;
- Positively contributes to the team working environment, taking ownership of issues and supporting colleagues where appropriate;
- Designing and implementing other tasks or projects as assigned;
- Undertake any other duties that may be required from time to time

Competencies:

Key areas are as follows:

- Good understanding of the tax laws and regulations
- Highly motivated and enthusiastic;
- Attention to detail;
- Ability to work well under pressure yet still deliver on time and budget;
- Strong time management and organisational skills;
- Excellent teamwork skills and the ability to communicate effectively with clients and colleagues at all levels;
- Professionalism, dependability, integrity and trustworthiness combined with a cooperative attitude;
- Handling sensitive and confidential information properly.

Professional Qualifications and Minimum Relevant Experience:

- A Level or degree level;
- At least 4 years' experience in tax;
- Studying towards tax exams or ATT qualified;
- Proficiency in computer programs such as Microsoft Word, Excel, Outlook and database systems;
- Good mathematical skills;
- Experience in financial services is desirable but not necessary.

*This job description is provided to assist the post holder to know their principal duties.
It may be amended however from time to time without change to the level of responsibility
appropriate to this post.*

Signed and agreed _____

Dated _____