Tax Planning Manager; Chandler’s Ford, Hampshire

Salary depending on experience

An established and successful accountancy firm in Chandlers Ford, we provide accountancy, audit and taxation services to both individuals and companies. We take great pride in providing clients with exceptional results, offering a consistent and proactive service to all.

The ‘ideal’ Tax Planning Manager will be currently working in a practice based tax department specialising in Owner Managed Businesses, with a Personal Tax focus. Trusts and/or probate experience would be a bonus.

The role is tax advisory only, supporting the tax compliance team and working closely with the Directors within the firm to deliver a range of tax services to a large and varied portfolio of clients. You must therefore be confident and articulate in order to communicate effectively with clients from a range of business sizes.

The Ideal Candidate

* Provide pro-active advice internally and externally to promote tax planning opportunities and cross-selling opportunities
* Prior experience in dealing with personal and business tax matters, over a wide range of situations is essential
* CTA qualified or equivalent
* A minimum of 5 years’ practical experience
* Ideally worked in a medium sized firm’s tax team with a varied responsibility
* Have good communication skills and be able to build a rapport and strong working relationships with clients, including over the telephone, video call and in person
* Able to take responsibility for own work and to provide correct and timely advice
* Organised and methodical approach to workload. Able to manage deadlines and prioritise competing demands on time
* Able to work on their own quickly and effectively with limited guidance but also work well in a team
* Good IT skills. Prior knowledge of Iris Accountancy software an advantage
* Have excellent report and letter writing skills
* Maintain knowledge and keep up to date with changes in tax legislation through professional reading, research and training courses

# Summary of Key Tasks

* Dealing with HMRC enquiries
* Support the Personal Tax Compliance Manager with technical assistance. This personal tax work will only include technical advice and assistance to the department, but will not involve management of a portfolio of Tax Return cases.
* Initiate tax-based marketing initiatives as opportunities arise, including new client work
* Provide internal tax technical updates to the Directors and Business Advisors
* Work with members of the tax planning team to ensure work for Directors is being completed by deadlines set
* All other tasks as required by the directors

We’d love to hear from candidates with the right skill set and qualifications who agree with us that this sounds like a great place to work.