

## Job Specification – Private Client Senior Tax Manager (London Office)

---

### About Shipleys LLP

Shipleys LLP is a firm of chartered accountants and professional business advisors, with offices in the West End, London and in Godalming, Surrey.

You'll find our approach a little bit different. We know that nobody understands the affairs or business like our clients, so our focus is on getting to know them, their objectives and priorities.

We build close, personal, long-term relationships with clients, to become a trusted adviser who they can always turn to for practical advice and solutions. As an active member of AGN International, we can introduce our clients to contacts across the globe.

---

### The Role

The role can be structured around a suitable candidate and will cover taking responsibility for a portfolio of domestic and international HNWIs, their trusts and associate entities as well as assisting with the trust department management. A key element will be to assist Directors and Partners with ad hoc personal tax planning projects, offshore structuring, domicile advice and succession planning. London based – possibility of occasional travel to clients and Shipleys office in Godalming.

- Prepares tax returns and computations in conjunction with agreed timescales; ensures the efficient and risk managed delivery of compliance.
- There will be an expectation that you will take full responsibility for project delivery.
- Supports senior staff on tax planning and other ad hoc projects.
- Recognise business development opportunities for selling services into clients.

- Build good rapport with clients, manage and meet client expectations.
  - Demonstrate sufficient technical knowledge and seek solutions to technical issues to undertake relevant area of work.
  - Identify risk and technical matters to senior members of team.
  - Manages work in progress to ensure recoverability targets can be met.
  - Responding quickly, as well as anticipating client requests/needs, keeping clients informed of progress to all aspects of the service provided, and maintaining regular contact.
  - Takes steps to minimise professional risk, including the appropriate documentation of services provided.
  - Good working knowledge of UK resident and non-domiciled tax and maintain awareness of UK and international taxation developments and legislation.
  - Other ad hoc duties in line with business requirements.
- 

### The Role Reports To

The Private Client Tax Directors and Tax Principals.

---

### Education and Experience

Applicants are expected to have strong academic history.

Preferably CTA qualified with recent and relevant experience.

Have a general practice background with exposure to a range of clients in size and sector.

---

## The Individual

The applicant should be able to demonstrate the following skills and behaviours:

- Use own initiative and provide an efficient and proactive service to clients and ensure that the clients' needs are fully met.
- Display a flexible, professional approach and have the confidence and ability to establish credibility with Principals and clients.
- Ability to manage a small client portfolio, including high net worth individuals.
- Strong interpersonal skills, able to establish and maintain professional working relationships.
- Demonstrate a passion for delivering quality whilst being commercially minded.
- An organised approach and good record keeping skills.
- Maintain in depth, up to date, knowledge of taxation.

In addition to the above, the individual should be commercially minded. They should display a flexible, professional approach and have the confidence and ability to establish credibility with Principals and clients.

- Access to a number of other benefits through a cashplan.
- Access to a number of other benefits such as Cycle to Work Scheme, Season Ticket Loan and Regent Street cinema tickets.

Please note that all insured benefit membership is available from the 1<sup>st</sup> of the month following the first three full months of employment.

To apply please email a covering note and your CV to

[recruitment@shipleys.com](mailto:recruitment@shipleys.com)

## Salary / Benefits

We can offer you:

- Highly competitive Annual Salary
- Exposure to high quality and varied clients whilst working within a friendly and proactive team.
- Salary review annually in January.
- Group Personal Pension Scheme: under the requirements of pension auto-enrolment you will be automatically enrolled into the Group Personal Pension Scheme (3% employee, 5% employer).
- Eligibility for yourself and your dependants for the firm's private medical insurance scheme.
- Life assurance cover at four times salary.
- Group Income Protection Scheme.
- 20 days' annual leave plus bank holidays.