



Job Description Proforma

Job Title	Manager
Job Grade	E04
Office location	Leatherhead
Department	Business Tax
Contractual Hours	37.5
People Manager	Andy England
Office Principal	Caroline Milton
Service Line Head	Richard Godmon
Works Closely With	Business Tax Team, Audit and Accounts Team, Corporate Finance and other stakeholders across the firm
Number of Direct Reports	Trainees/ Assistant Manager in corporation tax team
Overall, Purpose of Role	<ul style="list-style-type: none">• To manage a portfolio of business tax clients managing their compliance cycle and ensuring deadlines met, building relationships, and identifying areas where Menzies can assist the client.• To work on the delivery of tax advice and tax advisory projects in conjunction with colleagues across a number of Menzies business tax teams based in a number of Menzies offices, as well as other teams, and service lines to provide an efficient and valued service.• Identify wider opportunities and introduce other specialists across the firm.
Key Responsibilities	<p>This is a key role within the Business and Corporate tax team and the successful candidate will be responsible for delivering a mixed role of compliance and tax advisory services across a diverse mix of owner managed companies as well as some large and international groups operating across a variety of industries .</p> <p>The day-to-day work will include:</p> <ul style="list-style-type: none">• Managing a portfolio of business tax clients to ensure compliance requirements met, building relationship with the client, and identifying areas where Menzies can assist the client.• Assisting with training and management of the business tax team• Advising and assisting OMB's in respect of their business and tax



	<p>requirements for example succession planning, remuneration planning, timing of capital expenditure and capital allowances planning</p> <ul style="list-style-type: none">• Business tax focused but should have a working knowledge of other areas of tax that would affect entrepreneurs behind a business such as Business Asset Disposal Relief, Business Property Relief.• Advising and supporting entrepreneurial businesses throughout their lifecycle including on protecting and leveraging IP and associated restructurings, determining the right business structure, incentivising staff, growing internationally, and building and protecting value for the shareholders.• Advise on the tax elements of equity incentivisation, such as the EMI option scheme.• Proactively involved in networking, proposals and growing the corporate tax portfolio• Identifying opportunities for tax planning, risk mitigation and cross-selling between service lines to ensure clients receive a proactive and effective service.• Training and mentoring junior colleagues within the Business Tax Team• Ensuring the Firm's technical, ethical, risk and compliance procedures are adhered to in all cases.
Job Profile	
Required Qualifications	<ul style="list-style-type: none">• Qualified accountant and / or CIOT qualified tax adviser with at least one year's post qualified experience in a tax related role.
Required Skills & Knowledge	<ul style="list-style-type: none">• Corporate tax technical and practical knowledge• Good knowledge of tax issues affecting OMBs and their shareholders• Knowledge of other business taxes and tax reporting processes is preferable but not essential.• Knowledge of UK accounting standards and competent in interpreting accounts and other financial information• Strong IT skills including MS Office and databases , alphatax ideal but not essential.• Strong communication and organisation skills
Required Competencies	<ul style="list-style-type: none">• Shows initiative and an ability to self-manage, taking ownership of projects and capable of acting autonomously with support where required.• Collaborates as a team player and capable of developing strong



	<p>working relationships with clients and colleagues.</p> <ul style="list-style-type: none">• Confident managing a team, coaching, and providing feedback to trainees and other junior colleagues.• Inspires confidence in others. Communicates effectively both in writing and verbally, leveraging support from more senior colleagues when needed.• Demonstrates empathy, takes responsibility for developing more junior staff and is supportive and collaborative in working with peers and senior colleagues.• Able to work to deadlines and resilient to challenges and pressures.
Required Work Experience	<ul style="list-style-type: none">• Experience of working with corporate and entrepreneurial clients and managing at an assistant manager or manager level.
Travel Requirements	<p>(e.g., visits to other offices, client work requiring travel/overnight stays etc.)</p> <ul style="list-style-type: none">• Travel between UK offices and to UK client premises may be required.
<p><i>N.B. This job description outlines the types of responsibilities the incumbent is required to perform. The incumbent may be required to perform job related tasks other than those specifically presented in this job description. It is subject to regular review and will be augmented by the setting of half-yearly SMART objectives around business priorities and goals.</i></p>	

Employee Name:

Signature :

Date: