



Job Description Proforma

Job Title	R&D Manager
Job Grade	Manager
Office location	Solent
Department	R&D
Contractual Hours (F/T, P/T, both)	F/T
People Manager	Anthony Lalsing or William Sweeney
Office Principal	Dave Gosling
Service Line Head	Anthony Lalsing (Innovation and R&D) (Lucy Mangan – Business Tax)
Works Closely With	R&D tax team
Number of Direct Reports	3/4
Overall Purpose of Role	Management of a portfolio of R&D clients and claims including proactive advice, commercially appropriate tax planning, developing new business opportunities and contributing to the management and development of the Innovation and R&D team
Key Responsibilities	<ul style="list-style-type: none">• Preparation and review of R&D claims/reports for submission to HMRC• Identification of potential R&D claims and associated discussions with clients and prospects.• Communicate directly with clients on the phone or in person where appropriate to resolve queries and develop relationships• Provide technical advice and support to colleagues in relation to innovation incentives and tax planning for innovative companies• Provide support to partners and relationship managers on relevant client matters or opportunities• Ensure planning and cross-selling opportunities are identified and followed up.• Increase the client base through an organised approach to business development e.g. networking, client recommendation requests, and developing referrer base• Coach and train junior staff and trainees in developing their technical, client relationship and business development skills.• Ensure the Firm's technical, ethical and compliance procedures are adhered to in all cases
Job Profile	
Required Qualifications	<ul style="list-style-type: none">• CTA or ACA qualified• Will accept qualified by experience in industry
Required Skills & Knowledge	<ul style="list-style-type: none">• Self-starter capable of motivating, driving and developing the team



	<ul style="list-style-type: none">• Excellent knowledge of R&D tax legislation and rules• Effective communication skills at all levels and inter-personal skills in dealing with clients in person• Ability to explain and simplify highly technical point for clients to understand and report writing skill in conveying technical points to HMRC.
Required Competencies	<ul style="list-style-type: none">• Recognised by clients and internal colleagues as a subject matter expert• Collaborates with clients and Menzies' staff to ensure high quality client service• Demonstrates sound judgement, knowing when to refer to more senior experts for guidance and advice• Anticipates client needs, drawing on commercial understanding• Effectively delegates work within teams, providing meaningful feedback to ensure people develop within the tax community• Takes care to support the technical, professional and personal development and wellbeing of team members• Highly organised and structured inspiring confidence in others• Actively involved in networking to build external relationships
Required Work Experience	<ul style="list-style-type: none">• High level of R&D technical expertise and commercial application• Experience of preparing and submitting R&D claims/reports is essential• Practical experience in R&D tax planning• Previous experience of Patent Box claims is desirable
Travel Requirements	<ul style="list-style-type: none">• Travel to client sites• Occasional travel between offices
<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>	

Employee Name : Anthony Lalsing

Signature :

Date: 07/06/2023