

Strength in numbers.



Are you ready to join our growing team?

Data Processor

Location: Thames Valley – Maidenhead

Company: Wilson Partners
Leading Accounting, Tax and Corporate finance business

An exciting opportunity to join an ambitious, award winning financial service firm with big ambitions for the next five years.

Core to our business is the provision of accurate information to our clients to enable them to make quality business decisions. This means we need the data we provide them to be relevant, accurate and in real-time, ensuring they're compliant and able to sleep at night. That's why we're looking for a Data Processor with the skills to give our clients the information the need at their fingertips in order to realise their ambitions.

Who we are:

We are Wilson Partners. We combine the financial expertise, experience and accessibility of our talented team with a deep understanding of our clients to help achieve their goals.

We provide a suite of integrated, innovative and value-added accounting, tax and corporate finance solutions that empower businesses, investors and private clients to make better decisions.

We don't do grey suits, operate in silo's or spend all day counting beans. On the contrary, we operate out of a vibrant open plan office in the centre of Maidenhead, all our directors are fully engaged in the business and we're passionate about client success, because after all, if you thrive, we thrive.

Life is short, so we don't just want to make up the numbers. We are a business that makes a real difference to the relationships we build and helps to make life count for our people and our clients.

Each one of us is dedicated to challenging, inspiring and supporting our clients to live the lives they want and enjoy the success that will benefit those they care about and the wider community.

We have grown organically year-on-year since our inception in 2008. In September 2021, we took investment from a family office to accelerate our growth with a view to creating a top 25 accounting, tax and corporate finance business with 5 years.

Your new role:

To support our accelerated growth plans, which will include making a number of acquisitions of other accounting, tax and advisory businesses, we are looking for a data processor to join our team and help us maintain continuity of service to our existing and new clients.

Reporting to a senior client adviser your main activities will include general bookkeeping, preparation of vat returns, reporting, Company secretarial work and much more.

This role presents an ideal opportunity for a like-minded individual who 'gets' our values and our culture and wants to join a team at a really exciting stage in its development.

Job Description

Job title	Data Processor
Main purpose of job	To provide accurate real time data to our clients, to enable them to make better decisions and achieve their goals. To ensure our clients are compliant and therefore able to 'sleep at night'.
Reports to	Senior Client Adviser
Duties & key responsibilities	<p>Managing a number of service lines for clients including the following.</p> <ul style="list-style-type: none"> • Bookkeeping services • Preparation of VAT returns • Preparation of management reporting • Setting up payment runs • Preparation of CIS returns • Company secretarial services • The 'go to' person for client queries • Software support for clients • Xero and app setups/training • Adhoc project
General responsibilities	<ul style="list-style-type: none"> • Managing client's expectations and delivering up to date financials, whilst meeting all relevant compliance deadlines, every time. • CPD and ongoing training • Ensure confidentiality of sensitive client data • Direct communication with clients • Working closely with other team members in order to meet deadlines • Identify opportunities to improve/streamline internal/client processes • To act in accordance with the business' values and competency framework
Skills and abilities	<ul style="list-style-type: none"> • Ability to communicate with direct line managers • Ability to communicate clearly and concisely with clients • Use of Xero and Excel preferable
Knowledge	<ul style="list-style-type: none"> • GCSE's in Maths, English • Part qualified AAT (level 2/3) preferable but not essential • Basic VAT knowledge • 1-2 years minimum experience within a finance role, including purchase ledger, sales ledger and bank reconciliation
Personal attributes	<ul style="list-style-type: none"> • Attention to detail • Open to learning new systems and processes • Team player/social • Good communicator • Articulate • Ability to manage workload • Ability to meet deadlines • Refer to competency framework for specific behavioural indicators