

Ready to rocket?



Then you might be ready to join
Wilson Partners.

Tax Senior

Location: Sevenoaks - TN13 1YL
We offer flexible hybrid working
arrangements

Company: Wilson Partners Limited -
Leading Boutique Advisory/
Accountancy Practice

An opportunity has arisen to join Wilson Partners, an award-winning Accounting, Tax and Corporate Finance firm, recognised in 2023 as 'Outstanding to work for' by Best Companies.

We work with ambitious SMEs, their owners and Private Equity houses combining the financial expertise, experience and accessibility of our talented team to help them achieve their goals. Like our clients, we're ambitious too. We want to be a top 25 accounting firm by 2026 and we will only achieve that by investing in our people and continuing to provide innovative and value added accounting, tax and corporate finance solutions that empower clients to make better decisions.

Who we are:

Wilson Partners was established in 2008 in the heart of Maidenhead, Berkshire, by two brothers, Allan and Chris. From day one there has been a key focus on team culture, driven by the belief that our business is all about the people. Now with offices in Maidenhead, Cambridge, Sevenoaks and South Africa and a team pushing 150 and counting we're here to make a positive impact. Our continued growth journey means we are always on the lookout for great talent.

We're proud to do things a little differently, we're business enthusiasts who just happen to be accountants, we want to challenge and be challenged. We strive for the best and we want our clients and people to see the value in how we operate and that we can make a real difference.

Your new role:

This is an exciting role within a fun and dynamic team, where you'll work with a varied portfolio of clients across our tax services offerings.

This role is client facing and therefore requires fantastic levels of communication and the ability to build long term professional relationships with clients and the internal teams. The role requires good levels of communication and is suited to those that have a keen interest in business, a desire to learn and the ability to identify and solve problems in a professional manner.

There is the requirement to manage deadlines, complex technical tax queries and the ability to review the work of others within the team.

You will be a vital part of the team, providing accurate, timely information to clients, enabling them to make informed business decisions. This will include the processing of personal and corporation tax returns and preparation of other tax reporting to HMRC for EIS investments and employee option schemes.

Job Description

Job title	Tax Senior
Main purpose of job	To work with the team to ensure timely and accurate delivery of tax services
Reports to	Tax Manager
Department	Tax
Duties & key responsibilities	<ul style="list-style-type: none"> • Manage small portfolio of clients • Able to produce more complicated letters for clients • Ensure professional knowledge is technically up to date by attending the necessary courses and webinars • Billing and WIP Management and understanding of its importance within the firm • Maintain client relationships, including attending client meetings • Control workflow and manage filing deadlines and payment dates • Identify tax planning and cross selling opportunities to pass on or deal with directly • Support the Tax Manager(s) in the first instance and the wider senior tax team; Senior Tax Manager(s) and Tax Director(s). • Professional / ethics awareness <p>Option to study for CTA exams</p>
General responsibilities	<ul style="list-style-type: none"> • Support the Tax Manager(s) in the first instance and the wider senior tax team; Senior Tax Manager(s) and Tax Director(s)
Skills & abilities	<ul style="list-style-type: none"> • Ability to understand the needs of the client through direct contact and managing a small portfolio • Effective communication with clients and colleagues, ability to use initiative and ensuring accurate documentation • Main point of contact as job manager, directly liaising with clients to ensure completion of assignments is in line with planned timescales • Takes ownership of appropriate assignments maintaining quality of work whilst organising and managing time efficiently and effectively • Good understanding of income tax, capital gains tax, national insurance & PAYE, pension planning, corporation tax and business tax • Basic understanding of inheritance tax and VAT • Able to deal with HMRC tax enquiries with tax manager's supervision • Able to research when personal knowledge or understanding is lacking and ask questions where required • Aware of relevant financial targets and constraints and contributes to achieving these • Manages own client budgets keeping tax manager informed of progress and potential problems including actual vs. budget • Plans time effectively and completes timesheets by the required deadline • Aware of work pressures, peaks and troughs • Undertake CPD in accordance with Institute / Wilson Partners requirements and maintain up-to-date CPD record • Maintains high professional standards of conduct and practice

Job Description cont...

Knowledge & experience

- Qualified ATT - minimum 2 years relevant tax experience
- No ATT Qualification - minimum 4 years relevant tax experience

Personal attributes

- Willing to embrace change and new ideas
- Attention to detail
- Be a good team player demonstrating commitment and respect to other team members
- Open and honest communication
- Can-do attitude

Please email your cv to: bhavika.nesbitt@wilson-partners.co.uk