

Ready to rocket?



Then you might be ready to join
Wilson Partners.

Client Adviser

Location: Thames Valley – Maidenhead

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

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, dynamic team, with exposure to a varied portfolio of clients across outsourced services.

The role is client facing and requires fantastic communication skills at a senior level. There is a requirement to manage multiple deadlines, complex technical accounting queries, along with reviewing the work of others within the team.

You will be responsible for providing accurate, timely information to clients to enable them to make informed business decisions. This will include the processing of bookkeeping and preparation of management accounts, VAT returns and CIS returns.

The role includes building long term relationships with not only the internal team, but clients alike.

Job Description

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| Job title | Client Adviser |
| 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 the delivery of work to a portfolio of clients, including the following:</p> <ul style="list-style-type: none"> • Bookkeeping services • Preparation of VAT returns • Preparation of management reporting • The 'go to' person for client queries • Software support for clients • Xero and app setups/training • Setting up payment runs • Preparation of CIS returns • Company secretarial services – dividend vouchers • Adhoc projects |
| 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 and client managers • Ability to communicate clearly and concisely with clients • Use of Xero and Excel preferable |
| Knowledge & experience | <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 an accountancy practice |
| 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 |

Please email your cv to: Duncan.Bye@wilson-partners.co.uk