

Tax Manager - Private Wealth and Family Office

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Company: TMF Group

Location: United Kingdom

Category: other-general

A B OUT TMF GROUP

TMF Group is a multinational professional services firm helping businesses invest and operate safely around the world. With over 9,000 experts operating across 85 jurisdictions worldwide we serve a diverse range of clients including more than 60% of companies listed on the Fortune Global 500 and FTSE 100, asset managers, private clients and family offices. We strive to make a complex world simple offering a combination of accounting, tax, payroll, corporate secretarial and entity management services.

ROLE OVERVIEW

Based out of our London office you will support the Head of Private Wealth & Family Office with managing an interesting UK trust client base, as part of a small, highly experienced team. This is an exciting time to join the team as we look to expand further and you will be working within a friendly, supportive and flexible working environment.

KEY RESPONSIBILITIES

Your primary responsibility will be managing a diverse portfolio of clients including UK family trusts as well as leading the business development in this area. Your role will include:

Managing a portfolio including UK trust clients, ensuring the accurate preparation and signing out of trust accounts as well as trust tax returns as appropriate.

Coordinating and running trustee meetings to present accounts and tax returns, dealing with questions arising from the trustees and their other advisors.

Working closely with clients and their other advisors to understand their needs to ensure a seamless service.

Project managing the implementation of tax advice provided by legal advisors ensuring the accurate preparation of claims, elections and inheritance tax returns.

Managing clients with a trust administration and management package to ensure smooth and proficient delivery of this service.

Managing client profitability and overseeing debt collection, meeting monthly and annual revenue targets.

Supporting the Head of Private Wealth & Family Office with the development of the trust work within the team by upselling and cross selling to existing clients and building new business pipelines. This will include raising awareness internally of our team's offering in the UK and also introducing your existing network.

Continually keeping up-to-date with relevant UK tax changes and acting as a point of contact within the team and the wider TFM network for trust related matters.

Supporting the technical development of junior colleagues.

Supporting the enhancement of our existing processes.

KEY REQUIREMENTS

We are looking for experienced individuals with the following:

Excellent people skills to build and retain strong relationships with colleagues, clients and intermediary feeder relationships.

Excellent communication skills and the ability to provide clear, concise explanations.

Strong technical ability in the private client field, including detailed, up to date knowledge of the taxation of UK trusts.

Experience of profitably running a client portfolio including responsibility for trust tax compliance and trust accounts matters.

CTA or ACA qualified or qualified by experience with a number of years working within a Private Wealth, client facing environment.

Membership of the Society of Trust and Estate Practitioners (STEP) would be beneficial.

#LI-Hybrid

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