

JOB DESCRIPTION

Name:

Role: VAT Manager

Team: Tax - VAT

Our Values PASSIONATE, PERSONAL and PROFESSIONAL



PURPOSE OF ROLE

- Together with the Director and/or Associates, to act as the primary point of contact for the clients for whom you are responsible in all of their VAT-related dealings with Rickard Luckin
- To provide support to the management of VAT services provided by the firm
- To support the VAT Director on adhoc advisory projects as they arise.

REPORTS TO

- You will report to the Service Leader for VAT, Directors, Associates and Managers

MAIN AREAS OF RESPONSIBILITY

Technical

- Plan, organise and manage multiple VAT-based assignments and associated other work in consultation with the Director, to ensure they are dealt with accurately and in a timely manner
- Responsible for the planning and completion of assignments, including delegating work, and assigning tasks and responsibilities
- Structure work teams to successfully meet client deadlines and expectations
- Identify and explain legislative developments to both clients and team members
- Involvement in training the wider team on relevant specialist compliance or consulting task

Team Development

- Advise and support Team Members by promoting a learning environment and supporting the development of others

Building Relationships

- Liaise with specialists in other areas across the firm and ensure communication to clients on such matters is effective
- Deliver agreed service standards and actively promote consistent, exceptional service across the team
- Strengthen and maintain relationships with clients, contacts and our team
- Agree with clients the fees for individual services or a range of services in advance of these services being performed, wherever possible

Leadership

- Take responsibility and be accountable for the planning and completion of the work assigned to you
- Take ownership for the management of a client portfolio, acting alongside the Director or Associate to ensure clients' needs are met
- Participation in developing firm-wide initiatives
- Maintain a motivated assignment team
- Co-ordinate all services delivered to clients and ensure that they are performed in the most efficient and professional manner possible

Commercial and Entrepreneurial

- Ensure the effective and timely delivery, and the quality of service meets the firm's aims
- Ensure that services are only performed if they are in the best interests of the client and where the client has agreed in advance that the services should be performed
- Responsible for billing clients in a timely fashion in accordance with the firm's guidelines.
- Responsible for the collection of fees due from clients
- Meet annual fee targets and debtor and work-in-progress lock-up targets,
- Assist in marketing and promotional activities of the firm as requested in order to either secure new clients or introduce existing clients to new services

- Drive your individual section targets; WIP levels, debt recovery, billing targets and chargeable hours

AREAS OF RESPONSIBILITY FOR OTHER FUNCTIONS

Administration

- Complete your own timesheet in a timely manner
- Complete timesheets in a timely manner
- Maintain your Outlook calendar and ensure it is fully up-to-date at all times

HR

- Performance Management – Non-Student Tax Team Members
 - Give prompt, relevant and constructive feedback where appropriate or when asked to provide it
- Performance Management – Student Tax Team Members
 - Give prompt, relevant and constructive feedback where appropriate or when asked to provide it
 - Sign-off skills completed on the Skills Evaluation Forms
- Appraisals – Self
 - Complete appraisal documentation
 - Attend Appraisal Meetings
 - Complete Action Points arising from Appraisal Meeting
- Salary Reviews
 - Provide feedback for non-student salary reviews
- Inform HR of any changes in the personal information held by the firm

IT

- Utilise the firms IT systems to work efficiently and effectively
- Report issues arising to the IT team
- Attend IT training sessions are required

Learning & Development

- Advise and support Team Members by promoting a learning environment and supporting their development
- Consider your individual learning and development needs and liaise with your Line Manager to ensure where necessary, such objectives are met
- Ensure annual declarations are made to regulatory body
- Ensure CPD Record completed on an annual basis

Marketing

- Marketing
 - Attend RL-organised events
 - Represent RL at business exhibitions
 - Invite prospects to events/seminars and follow up afterwards
 - Be active on all RL social media channels, interact with followers (which consist of clients, contacts and prospects)
 - Take potential new client enquiries and make contact to organise appointments
- Networking:
 - Attend networking events and seminars
 - Form relationships with other professionals
- Business Development:

- Liaise with the Service Leader for Tax, Tax Directors and Associates to develop firm-wide Tax initiatives
- Generate leads for self and others
- Be a sector/service expert
- Ask for referrals from clients and other professionals and refer them to each other in relation to their industry
- Provide content for proposals and pitch documents (for marketing to design the document once final wording has been provided)

PERSON SPECIFICATION

QUALIFICATIONS AND SKILLS

- CTA, or qualified by experience
- Up-to-date and appropriate knowledge and skills in your technical field to enable you to fulfil the purpose of your role
- Computer skills appropriate to your role
- Verbal and written communication skills appropriate to your role

BEHAVIOURS

Core Values

All Team Members are expected to demonstrate our values of *Passionate, Personal and Professional*:

- Demonstrates a passion for delivering the firm to our clients, working with them pro-actively to achieve their aspirations.
- A personal approach is applied to everything you do, internally and externally; ensuring you always consider the recipient of your communications and actions.
- Always behaves professionally; demonstrates strong moral values; uses common sense and practical approach to overcome problems, applying sensitivity in difficult or tense situations.
- Fosters a climate in which performance-related feedback is expected and given in a straightforward manner; is approachable so the team know they can go to you with anything; manages any frustrations in a considered and appropriate manner.

Technical

- Proven to be technically competent and keeps skills up-to-date in relevant areas of compliance for your role within the firm.
- Confident in giving technical advice to clients within your core area of expertise.
- Able to identify where you need to refer to other technical experts within the firm when out of your area of expertise or where second opinion required.

Team Development

- Takes time to help trainees acquire and understand technical knowledge; provides active support for students with technical training and acquiring skills and relevant experience.
- Provides day-to-day support to the team and works with them towards achieving common goals / objectives.

Building Relationships

- Builds strong, open and pro-active relationships with clients and is one of their main points of contact at the firm.
- Attends internal team events to strengthen relationships within the firm; builds relationships with wider team members across all offices and service lines.
- Makes the extra effort to get to know colleagues and understand all the roles within the firm; identifies opportunities to work collaboratively to enhance client service standards.

Leadership

- Leads by example with behaviour; demonstrates strong professional values of integrity, respect and is trustworthy; consistency in your own standards and expectations of team.
- Has earned respect within the firm and has developed appropriate leadership style to suit your role; is able to adapt leadership style to different situations and environments.

Commercial and Entrepreneurial

- Maintains a strong commercial focus, whilst delivering great client service; ensures recovery issues or problems are identified and communicated at the earliest opportunity to limit under-performance issues.
- Committed to provide the best possible service; prepared to "go the extra mile" when needed to meet performance and client service standards.
- Engages with the firm's overall strategic objectives with an understanding of the role you play within this.