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| Job Title: | Private Client Tax Adviser | Level/Salary Range: | Dependent upon experience |
| Department / Group: | Tax | Travel Required: | Yes |
| Location: | Blackburn / Hybrid | Position Type: | Permanent |
| Department Contact: | Dominic Ball - Director | HR Contact: | Lisa Kennery - Director |

About us

Pierce Group is a leading independent firm of business advisers supporting owner managed businesses. Based in Blackburn, Lancashire the firm's core client base of owner managed businesses resides in East Lancashire but extends throughout the UK and Internationally.

Being independent best places us to understand, advise and support owner managers on a myriad of business issues, in the fields of compliance, business specific and tax consultancy, corporate finance and its forensic practice.

We work in partnership with many other professional services across the North West, bringing a trusted full suite of support to clients.

About the role

This role will take responsibility for the delivery of tax compliance services to a portfolio of individuals, partnerships and trust. You will be contributing to advice, and work on all aspects of personal tax matters within the allocated portfolio of clients; working within a wider tax team, alongside other private client and corporate tax departments and supporting the Directors within the firm.

Through this role you will have primary responsibility to deal with all matters relating to the delivery of personal tax compliance services and working alongside the Directors on project work for more complex clients.

Key responsibilities

- Responsible for a general portfolio of personal tax clients and dealing with compliance matters including preparation and submission of annual Tax Returns of all allocated clients; ensuring all are compliant with tax regulations;
- Looking after the day-to-day issues/queries from clients working with relevant team specialists as appropriate;
- Liaison with HMRC and clients on all personal tax issues;
- Co-ordinating with other professional services to oversee their input into transactions and other tax advisory projects;
- Developing and maintaining strong relationships with clients and understanding the client's business in order to identify areas for the provision of tax and other services;

- Provide tax advice to clients, in a supported environment, which may include legislative changes or tax efficient planning advice where appropriate;
- Responsible for providing consistent client service of a high quality which includes maintaining regular client contact such as face to face meetings, e-mail correspondence and telephone discussions;
- Assisting with ad hoc project work, that may include work on P11Ds and working across teams within the private client practice;
- Respond quickly to, as well as anticipating, client requests/needs, keeping clients informed of progress in relation to all aspects of the service provided, and maintaining regular contact with clients.

Technical Skills

- 3+ years' experience within a private client role;
- Experience in preparing self-assessment tax returns for individuals, partnerships and trusts;
- Proficient in undertaking research of technical legislation, HMRC manuals and guidance;
- Excellent communication skills and proficiency in Microsoft Office applications;
- Experienced in the use of tax return software, ideally CCH;
- ATT qualified.

Duties

- Processing and reviewing Personal, Partnership and Trust Self-Assessment Tax Returns.
- Assisting the team in both compliance and planning issues.
- Managing and developing your own portfolio of clients, building strong working relationships with those clients and providing planning advice where appropriate.
- Liaison with stakeholders, including clients, HMRC, tax team and Directors.
- Identifying cross-servicing opportunities for Personal Tax clients and introducing specialist consultants where appropriate.

Soft Skills

- Excellent written and oral communication.
- High level of personal integrity and honesty.
- Ability to work both independently on own initiative, and as part of a team
- Good organisational skills.
- Excellent attention to detail
- Motivation and drive

Why Join Pierce

Pierce is a fantastic place to work and continues to grow. With growth comes tremendous opportunities. We are excited to see what the future holds developing our business and our people. As a leading Independent practice we have unparalleled opportunities to push the right candidates through the business.

We are:

- Well established – over 90 years
- A growing and forward-thinking firm

We have:

- **Pension** – helping you save for your future.
- **25 days annual leave + bank holidays** – Time out to focus on what's important to you.
- **Hybrid Working** – we all work in different ways and we give you flexibility to manage where and when you work.
- **Employee Referral Bonus** - We're always looking for talented individuals to join our team.
- **Varied Learning & Development Opportunities** - Continuous development for your professional qualifications and career aspirations.
- **Regular social events** – time away from work to have fun with team socials and firmwide events .
- **Client Referral Scheme** – We offer generous financial rewards for helping Pierce to grow our new client portfolio.