

## Job Description

### Tax and Trust Assistant Manager for the Private Client Department

#### Introduction

The Private Client Department is looking to recruit a qualified Chartered Accountant to assist in the trust and tax section in managing our clients' trust, tax and financial affairs for an established portfolio of clients and to work closely with the managers and other fee earners.

#### Duties and Responsibilities

General day to day duties will include:-

- Assisting with trust compliance including accounts and tax return preparation
- Inheritance tax forms as required for trusts
- Preparation for and attendance at client meetings
- Assisting with more complex cases on ad hoc assignments when called upon by tax and trust managers and solicitors in the private client department

#### The Individual

The ideal candidate will have the following skills and attributes:

- Ability to be proactive and reactive in addressing clients' affairs and requirements
- Strong communications skills and an ability to work as part of a team, including with our private client lawyers and other professionals within and outside this firm
- Achieve minimum time targets and meet regular billing requirements
- Ability to keep abreast with changes in legislation and market developments
- Good IT skills and preferably a working knowledge of CCH Trust Accounts and CCH Personal Tax
- High degree of knowledge of trust accounting, including specialist areas such as landed estates and charitable organisations (knowledge of SORP would be beneficial)
- High degree of knowledge of the taxation of trusts
- An understanding of estate, personal, offshore and indirect taxation matters
- ACA qualification preferably newly qualified with up to two years' relevant experience

The successful candidate will be supported in their continued professional development.

## **The Client Base**

Whilst there is no such thing as a typical client, the core profile of clients who are looked after by the firm are wealthy families, often with a number of family trusts and grant making charitable trusts. Their assets are likely to include shares in family owned businesses, quoted investments, bespoke open ended investment companies, hedge funds, landed estates and property. We act for business executives, entrepreneurs who have generated their own wealth, as well as families whose assets have accumulated over the generations. Although most of our clients have a UK nexus, there is a substantial offshore, foreign and international aspect to our practice.

## **The Private Client Department**

The Private Client Department has two sections, the legal section and the tax and trust section. These two sections work closely together on our clients' affairs so as to provide a seamless service.

The legal section comprises solicitors, legal executives and secretaries. There are currently seven partners, one senior professional support lawyer, five senior associates and four associates, two chartered legal executives (specialising exclusively in probate and estate administration) and one trainee solicitor in the section.

The tax and trust section consists of fourteen qualified and unqualified trust and tax accountants and practitioners, including two chartered accountants and tax advisers and three secretaries.

## **The Firm**

Payne Hicks Beach is a 34 partner firm of solicitors based in offices in New Square, Lincoln's Inn. In total the firm comprises about 190 staff. The firm provides specialist legal services to private and commercial clients. We are best known for our family and private client work and are widely regarded as one of the very best of the small number of firms in the UK who provide these specialist services at the highest level. We also have an excellent reputation in many other areas of law (rated in both Chambers and Legal 500), including trust litigation.

More information about the departments and the work of the firm may be found on our website, the address of which is [www.phb.co.uk](http://www.phb.co.uk)

Please contact Janice Okuns, HR Manager, for further information.

## **Remuneration Package**

Salary: Market rate

Other benefits: 4 x Life Assurance

Permanent Health Insurance

Medical Insurance (after 1 year qualifying period)

Medicash Scheme (after 1 year qualifying period)

Pension Scheme (after 1 month qualifying period). The firm contributes to a Personal Pension Plan.

Interest-free season ticket loan after 3 months

## **Other**

We are open to flexible working arrangements.