

## Tax and Trust Apprenticeship for the Private Client Department

### Introduction

The Private Client Department is looking to recruit a Trust and Tax Apprenticeship to assist more senior team members in the trust and tax section in administering our clients' trust, tax and financial affairs and in the preparation of accounts and financial statements.

### Duties and Responsibilities

General day to day duties will include:-

- Posting and reconciling accounting records
- Assisting with tax computations and tax return preparation
- Producing meeting papers for client meetings
- Arranging the payment of invoices and the distribution of funds
- Assisting with reporting and compliance obligations
- Assisting with more complex cases on ad hoc assignments when called upon by tax and trust managers and solicitors in the Private client department
- Scanning legal documents onto the computer system
- Dealing with incoming post

### The Training

The successful candidate will be appointed a mentor and be trained by and primarily work under the supervision of various senior members of the trust and tax section.

A structured programme of tuition will be provided by an accredited training provider over a two year period. Depending on the applicant's experience and level of entry, this may be a Level 4 apprenticeship, with the view to studying for either the AAT or ATT. For suitable candidates and/or graduate applicants, this apprenticeship may be extended to a Level 7 apprenticeship, working towards the CTA qualification.

External training will be either for one day a week or on block release and be supplemented by private study, periodic assessments and on the job training.

On completion of the apprenticeship, the successful candidate will continue to be given help to develop and can continue in the firm's employ.

### The Individual

The ideal candidate will have the following skills and attributes:

- good academic record including 3 A-levels (BBC minimum)

- good working knowledge of Microsoft Office packages e.g. Excel and Word
- excellent command of both spoken and written English and numeracy skills
- experienced IT user with intermediate Excel skills
- good administrative skills and attention to detail, and the ability to prioritise a workload
- ability to work as part of a team or on their own
- well organised and able to act with discretion when dealing with confidential information
- a good telephone manner and customer service skills
- a positive outlook, flexibility and appetite for taking on challenges

### **The Private Client department**

The Private Client department has two sections, the legal section and the trust and tax 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. This currently includes nine partners, one senior professional support lawyer, six senior associates and three associates, two chartered legal executives (specialising exclusively in probate and estate administration) and one trainee solicitor.

The trust and tax section consists of fifteen qualified and unqualified trust and tax practitioners, including three chartered tax advisers (of whom two are chartered accountants), three apprentices, one trust administrator and two secretaries.

### **The Firm**

Payne Hicks Beach is a 40 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)

### **Remuneration Package**

<b>Salary:</b>	Market rate
<b>Other benefits:</b>	4x Life Assurance Permanent Health Insurance Medical Insurance (after 1 year qualifying period) BUPA Cashplan (after 1 year qualifying period) BUPA Health Assessment (after 1 year qualifying period) Pension Scheme. The firms contributes to a Personal Pension Plan. Interest free season ticket loan after 3 months Cycle to Work Scheme Wellbeing Programme
<b>Holiday:</b>	22 days increasing to 25 days