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## Tax Compliance Assistant

Location: Edinburgh or Glasgow  
Reporting to: Partner – PTE – Private Client

### Main Duties

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- Preparation of tax returns for individuals, trusts, charities and estates.
- Advising clients in relation to their tax returns, relevant claims and elections, and tax liabilities.
- Liaising with clients to ensure that all necessary information and funds are obtained timeously.
- Submitting tax returns and arranging payments to HMRC within relevant time limits.
- Dealing with straightforward enquires from HMRC into tax returns, and liaising with clients to settle liabilities and arrange for any overpaid tax to be reclaimed.
- Assisting with applications for VAT registration and other basic VAT paperwork (training will be provided if required).
- Assisting with corporate tax advice where appropriate such as stamp duty, land and buildings transaction tax, VAT and capital allowances (training will be provided if required).

### Candidate Profile

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#### Essential

- Recent experience of preparing and submitting tax returns for individuals, trusts, charities and estates.
- Experience of advising clients in relation to tax compliance.
- Experience in the use of tax software and HMRC online forms.

#### Desirable

- Excellent organisational and communication skills.
- A proven ability to interact successfully with clients, sometimes in difficult situations.
- A good eye for detail.
- Keen to expand knowledge of tax and develop wider experience.

### Technical Skills/Experience

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- Demonstrates appropriate knowledge of tax compliance and tax law.
  - Ability to communicate successfully with a wide range of clients.
  - Demonstrates initiative to obtain relevant information to complete tasks.
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- Able to identify issues outside their expertise and seek appropriate advice.
- Produces a solution best addressing the client's requirements.
- Effective spoken and written advocacy skills.

### Business/Work Management

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- Works as part of a team to meet objectives within agreed timescales and budgets.
- Complies with all firm policies and procedures, including financial, and legal and regulatory requirements.
- Keeps clients and colleagues up-to-date with latest developments where appropriate.
- Implements improvements in working methods.
- Prepares well for phone or video calls and meetings with clients and colleagues.
- Makes effective use of the firm's information management systems.

### Firm Contribution

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- Displays an awareness of and commitment to the team's and firm's goals.
- Where appropriate, participates in development of new team objectives.
- Participates willingly in business development and, where appropriate, client and firm events.

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**These duties reflect the situation at February 2020 and may be subject to reasonable change at a later date.**

*Shepherd and Wedderburn is committed to protecting the privacy and security of your personal information that we collect as a "data controller". The information provided by you will be processed in accordance with our GDPR Privacy Notice for Applicants and Work Experience Students. If you are successful in obtaining paid employment with us, we will hold your information in accordance with our Personnel Data Retention Policy, which will be provided to you at the relevant time.*

*We will process the information you provide solely for the purpose of evaluating your application for employment. The information will be disclosed to the interview panel (if relevant), your line manager (if appointed), and Human Resources staff members. We may contact any references provided for the purposes of discussing your application, and will ask your permission before doing so.*

*If you provide any information deemed to be "special category" information under the General Data Protection Regulation, we may use this as follows:*



- *We will use information about your disability status to provide appropriate adjustments to the interview process.*
- *We will use any information provided in our diversity monitoring form about your race, colour, nationality, ethnic or national origin, gender identity, gender expression, social mobility background, religious beliefs, sexual orientation, any disability information, age, and marital/civil partnership status to ensure meaningful equal opportunity monitoring and reporting. Any analysis of this data will be done on an anonymous basis.*

*Should your application be unsuccessful, the information provided will be deleted within 1 year of a decision not to progress your application.*

*If you have any further questions about how we process and store your information, or your rights in relation to this, please refer to our [GDPR Privacy Notice for Applicants and Work Experience Students](#).*