

Tilney Smith & Williamson

Tilney Smith & Williamson's personal wealth management services include financial planning, investment management and advice, online execution-only investing and personal tax advice. For businesses, its range of services include assurance and accounting, business tax advice, employee benefits, forensic advice, fund administration, recovery and restructuring, as well as corporate finance and transaction services.

Bristol

Our Bristol office comprises 35 partners and directors and around 190 staff working from offices in the heart of the city.

We focus primarily on mid-corporates, owner-managed businesses, private clients and professionals, and provide robust, open and honest support. Our skill is to link our many service offerings to provide 'joined up' thinking, delivered in an approachable and pragmatic way with a high degree of partner involvement

Business Tax

We provide a wide range of tax and consulting services to a broad range of companies, from quoted multinational groups to owner managed businesses.

Through establishing close relationships with our clients, we ensure that we are able to deliver the most comprehensive business tax advice, and also ensure we are aware of the key opportunities and risks faced by our clients.

Job Description

Purpose of Role:

This role will provide tax compliance and advisory services for a wide range of business clients.

The primary responsibility will be to deal with all matters relating to the management of a portfolio of clients. You will also provide assistance to Directors/Partners in both client work and in the management of the group. You will be involved in special assignments and advisory projects on an ad hoc basis.

A key part of the role requires the individual to actively seek, and keep the Partner informed about any new business opportunities arising at existing and new clients.

Key responsibilities:

Client work

- Undertake “ad-hoc” consultancy work
- Manage portfolio of complex cases, both advisory and compliance
- Give exceptional client service and be responsible for maintaining regular contact with client team
- Need to keep up to date technically
- Budgeting and monitoring compliance fees

Staff Management and Development

- Liaison with Partners
- Appraisals/monitor staff performance
- On the job training/mentoring for junior staff on a one-to-one basis, including technical and procedural matters
- Dealing with staff questions

Compliance

- Ensuring S&W procedures are followed taking account of institute and HMRC guidance, where relevant
- Ensuring department KPIs are met around billing and recovery targets

Personal Development (Technical & Other)

- Reading; internal meetings; internal and external seminars and courses
- Awareness/interest in what other parts of the firm can do, to encourage cross-referrals

Practice Development

- Assist partners marketing activities/approaches

Key Competencies:

1. Client focus - ability to deliver consistently excellent client service.
2. Commercial awareness - delivers value to client and team profitability.
3. Teamwork - organises and supports others.
4. Good communicator - both written and oral.
5. Problem solving - positive attitude to solving problems and deliver outcomes.

Candidate Profile

Education/Qualifications:

- Qualified accountant (ACA/ACCA/CA) and/or tax advisor (CTA)

Key Experience/Skills:

- Significant corporate tax experience gained within the profession and or industry
- Technically capable tax adviser who is able to assist in complex client work
- Demonstrable experience of managing people
- Appetite to grow business development skills
- Strong IT skills

About Tilney Smith and Williamson

Tilney Smith & Williamson is the UK's leading integrated wealth management and professional services group, created by the merger of Tilney and Smith & Williamson on 1 September 2020.

With £54.8 billion of assets under management (as of 30 June 2021), it ranks as the third largest UK wealth manager measured by revenues and the eighth largest professional services firm ranked by fee income. The Group currently operates through three principal brands: Tilney, Smith & Williamson, and online investment service Bestinvest. It has a network of 28 offices across the UK, as well as the Republic of Ireland and the Channel Islands. Through its operating companies, the Group offers an extensive range of financial and professional services to individuals, family trusts, professional intermediaries, charities, and businesses.

Value statement

Tilney Smith & Williamson's chosen purpose to "place the power of good advice into more hands" succinctly encapsulates the group's central mission of supporting both individuals and businesses to achieve their goals.

In delivering its purpose, Tilney Smith & Williamson have set out three core values that it is committed to embedding in the culture of the business:

- **Personal – we treat you as an individual:** We are a people business at heart and strive to deliver a friendly, inclusive, and personalised service to all of our clients, large and small.
- **Partnership – we go further together:** We develop relationships that stand the test of time, spanning multiple generations. We partner across the full breadth of our expertise to create value for our clients, our company and society at large.
- **Performance – we strive for more:** We are ambitious for our clients and for ourselves, so we aim to be a forward-thinking and innovative business that leads the way in the industry.

Diversity statement

The Tilney Smith & Williamson Group recognises the benefits of a diverse workforce and is committed to treating all colleagues with dignity and respect regardless of race, gender, disability, age, sexual orientation, religion, or belief. At Tilney Smith & Williamson we are committed to equal opportunities in all aspects of our work.