

Job Description

Job Title:	Tax Assistant Apprentice
Department:	Tax
Line Manager:	Tax Manager
Line Management Responsibilities:	None

Aims and purpose of the job

To assist and work as part of the Tax department by ensuring accurate and efficient work is carried out at all times. To ensure that the team meet all appropriate HM Revenue and Customs deadlines on behalf of their clients.

To develop and consolidate your knowledge of professional tax services by undertaking and successfully completing a Level 4 Taxation Technician qualification as part of your apprenticeship.

Generic role duties to include:

1.	To prepare and submit Self Assessment tax returns; ensuring all work produced is accurate, to the highest standard, and in accordance with relevant legislation, with emphasis being placed on ensuring there is a high level of technical content in all work.
2.	To check tax repayments and other correspondence from HM Revenue & Customs and reconcile differences with our calculations.
3.	When required to liaise with HM Revenue & Customs, to do so in a professional and appropriate manner.
4.	To use and comply with business systems and processes, for examples APS, Virtual Cabinet, and Digita.
5.	To ensure that client data, information and records are secure at all times.
6.	To maintain and update computer records in a timely and accurate manner.
7.	To aim to carry out all work efficiently with a recovery of at least 95%.
8.	To ensure there is clear communication with your line manager and other team members on work being carried out.
9.	To assist your line manager to identify ways to improve and develop departmental systems and the client experience.

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10.	To deal with all communications in a timely manner and ensure they are of a high professional standard using David Allen brand guidelines and templates.
11.	To maintain your own professional and technical knowledge by attending technical workshops and further training, reviewing professional publications, establishing personal networks, benchmarking state of the art practices, participating in professional societies and business networking meetings.
12.	To ensure your studies are up to date and that you pass any assessments at first attempt.
13.	To manage and meet the requirements of your apprenticeship standard within the relevant timescale.
14.	To carry out any other tasks as required.

Central duties

15.	To represent the business when required to ensure positive links, relations and networks.
16.	To show a commitment to diversity, equal opportunities and anti-discriminatory practices.
17.	To undertake personal development necessary to ensure effective performance in the role.
18.	To participate in relevant and appropriate training and development as required.
19.	To demonstrate the David Allen values of ambition, professionalism, knowledge, integrity, and respect in the work you do and during your appointment.

Method of working

The David Allen Group expects all staff to work effectively, both as individuals and as part of a team, delivering high quality services and support to clients and staff. In doing so, the company expects all staff to display all of the core competencies as defined in the performance and development appraisal arrangements and to conduct themselves in a manner which befits their professional status and responsibilities.

Public relations

Considerable importance is attached to the role the business plays in its various communities. It therefore follows that all staff are expected to work to maintain and develop these relationships at every opportunity by positively promoting the work of the business and the role it can play in supporting the aims of its stakeholders.

This job description is a guide to the work the post holder will be required to undertake. In consultation with the post holder, it may be amended from time to time by the line manager to meet changing circumstances or business needs. Specific targets and objectives will be agreed with the post holder and will be reviewed regularly as part of the performance management arrangements.