SINCE 1768
GEPP
SOLICITORS

Private Client Tax Advisor – Private Client Department Chelmsford Office – Full Time

Job role:

We have an exciting opportunity for a Tax Advisor to join the Private Client Department in the Chelmsford office. The position has arisen due to growth in the tax services provided by the department.

The successful candidate would be working directly with the Partners in providing tax advisory and compliance services to a varied client base. The role includes assisting fee earners throughout the firm with their tax questions, as well as direct contact with clients.

Day-to-day work will include being involved with estate planning (including IHT and CGT), trust advice and compliance, CGT advice, SDLT advice and estate taxation. An understanding of inheritance tax reliefs, particularly APR and BPR would be an advantage.

We are looking for a candidate who is CTA qualified and who wants to expand their knowledge and experience into a private client advisory role in a busy and dynamic department within a successful law firm. Someone wanting to specialise in private client work within a law firm will find the role particularly rewarding.

The role will involve substantial client contact, including attending meetings and phone calls. It will also involve managing junior staff and reviewing their work as required.

The successful candidate will have the opportunity to work within a team with a reputation for providing excellent client care. Following successful completion of the probation period, the role offers hybrid working with a minimum of 3 days per week in our first-class modern office.

As a leading law firm in Essex, Gepp Solicitors can trace its roots back to 1768 and is a well-known name in the area. With a rating of 4.9/5.0 on Review Solicitors and over 1,500 reviews to back this up, the firm is one with a great reputation.

Responsibilities and Duties:

- Assisting the Partners with complex tax planning.
- Attending meetings with clients
- Preparation of tax planning reports, including estate planning and the use of trusts
- Dealing with a complex and varied portfolio, including one-off projects and recurring client work
- Advising clients and colleagues over the phone, in writing and in person

Personal Specification

- CTA qualified (ideally minimum 1-2 years)
- Experience in Trusts, Stamp duty and consultancy would be desirable
- Previous experience with farms and business would be desirable
- Ability to work within a team and deliver exceptional client care
- Excellent written and verbal communication skills with a demonstrated ability of building effective and trusting relations with people internally and externally to the firm
- Flexible, adaptable and positive attitude to work

Salary and Benefits

- Competitive Salary
- Life Assurance (4 x annual salary)
- Income Protection
- Health cash plan, which includes discounted gym membership and many other offers
- Employee Assistance Programme
- Free off-site car park
- 25 days holiday in addition to public holidays
- Monthly staff lottery

We are committed to recruiting individuals on merits of suitability for each role, based on qualifications and experience. All applications are treated fairly and equally regardless of sexual orientation, race, disability, religious beliefs and any other protected characteristic, ensuring that there are equal opportunities at all stages of the recruitment process.

Please submit your CV (maximum double sided) to Megan Johnson, HR Assistant.

E:recruitment@gepp.co.uk