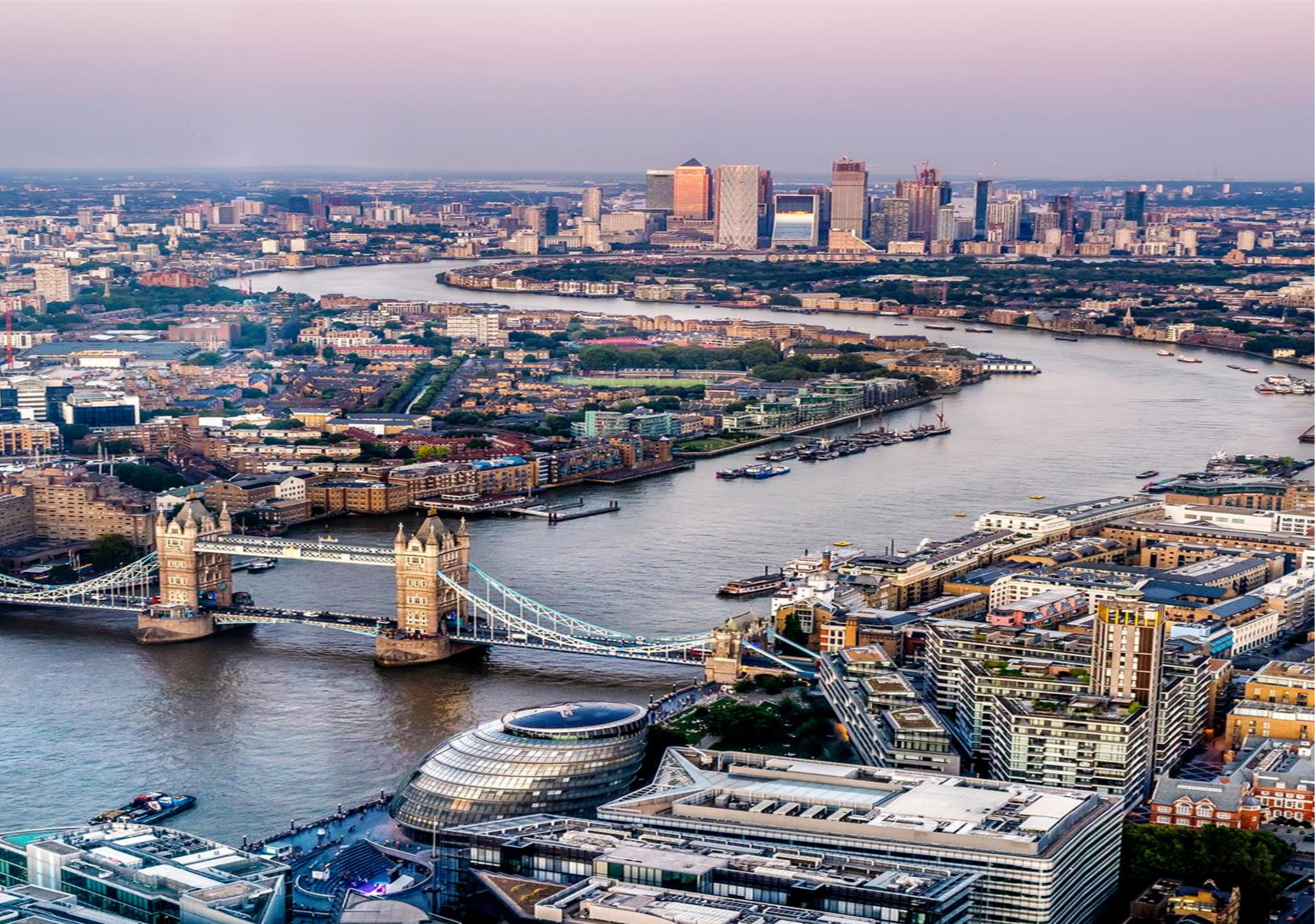
Charles Russell Speechlys

Senior Trust and Tax Manager

Job Description



Charles Russell Speechlys

Who We Are

Who we are

We are an international law firm with a focus on private capital at the intersection of personal, family and business.

Our ability to understand people makes us who we are. We work together to build deep and trusted relationships that deliver meaningful value to our clients. We do this with empathy, attention, and clarity. No jargon, no attitude. We know what matters.

Responsible Business

We recognise that our long-term success as a responsible business depends on the health and resilience of our people, our clients, our communities, and our natural environment. We are working hard to ensure that we make a positive contribution for all our stakeholders.

As part of this, we are committed to developing an increasingly diverse, inclusive, and supportive workplace environment where everyone can bring their whole selves to work, feel valued, feel that they belong and can fulfil their potential.

We understand the benefits of hybrid working.

We adopt a hybrid working approach, working on a 60/40 split of working in the office and working remotely. This arrangement is non-contractual, dependent on requirements of the role and subject to manager approval.

What we value

Our values represent who we are as a Firm. They are designed to guide the way we think, behave, speak, collaborate, and do business. Please see our four core values below.

Collaborative
we pull together

Committed
we drive performance

Authentic
we stay grounded

Forward-looking
we look beyond

Charles
Russell
Speechlys

Senior Trust and Tax Manager

We are looking to recruit a first-rate Senior Trust & Tax Manager. We are flexible on location for the right individual, and we are open to discussing agile working arrangements. The role will also require travel to our other offices in accordance with business needs.

The successful candidate will work closely with partners, associates and also members of our growing Trust team. The Trust team itself deals with a wide range of trust work, including charities, and sits within the Firm's market-leading Private Client division.

The role will suit someone who has excellent people skills and who is looking to develop their career within a friendly collegiate team that is widely recognised for its expertise in this area.

Role and Responsibilities

- Managing a complex portfolio of domestic trusts and trust structures for a very high and varied calibre of client.
- Proactively manage, mentor, and performance supervise a team of Trust Professionals, ensuring they are exposed to a variety of work and progress their careers in trust management.
- Delivering and implementing complex trust and estate planning advice to mainly UK clients in relation to the tax and trust law positions for trusts under management.
- Proactively managing and building client relationships, acting as the first point of contact for trustees, beneficiaries, and intermediaries.
- Ensure financial management of all portfolios (billing).
- Overseeing the timely reporting of trusts for CRS, FATCA, ATED, and the Trust Registration Service
- Management of relationships between grant-making and applicant charities, dealing with prospective beneficiaries, drafting deeds and associated policies
- Overseeing and contributing towards the timely preparation of annual trust accounts and tax returns, as well as the personal tax compliance for a number of UK and non-UK domiciliaries. Advising on the relevant annual exemptions and reliefs and calculating the associated tax liabilities.

- Calculating the Inheritance Tax liabilities for complex trust structures and overseeing the preparation of the Inheritance Tax returns. Dealing with HM Revenue and Customs, as required

- Monitoring the performance of trust investments by reviewing investment reports and activating investment reviews. Preparing/reviewing trustees' investment policy statements and ensuring the agreed investment policies are enforced and remain appropriate.

- Reviewing and interpreting trust deeds and related documentation with input from the wider team, as appropriate. Preparing legal documentation, such as trustee resolutions and deeds of appointment.

- You will have a lot of client contact and be expected to take part in client meetings and liaise independently with clients, beneficiaries, banks, investment managers and other professional advisers such as valuers and accountants.

- Comply with all relevant legal and regulatory obligations including the Solicitors Regulation Authority (SRA) Standards and Regulations, and Principles.

Person Specification

- Substantial experience and strong technical knowledge of UK trusts

- Be enthusiastic and dedicated to pursuing a career in trust management.

- Be willing to share knowledge and experience with colleagues, and comfortable training more junior members of the team.

- Have excellent organisational skills and the ability to prioritise competing demands effectively

- Have a high degree of attention to detail

- Have strong problem-solving skills

- Be flexible and willing to undertake a wide variety of tasks

- Be a pro-active team player, who is also highly self-motivated and able to work on their own initiative

- Ability to develop rapport with a wide variety of individuals

- Be capable of producing correspondence and documents

- Have strong numerical skills
- Be computer literate and competent with Microsoft Word and Excel

Competencies

- Working together
- Inclusive
- Driving high standards
- Client - centric
- Integrity and respect
- Personal impact and growth
- Commercial mindset
- Responsible Business

Contact

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This job description is not rigid or exclusive and may be adjusted at any time in consultation with the Partners and/or Director of HR to meet the needs of the Firm or the post holder. There is constant review and adaptation to meet the changing needs of the Firm.

Please note in respect of our UK offices, any offer of employment will be conditional upon the successful candidate having the right to reside and work in the UK. In respect of the overseas offices any offer of employment will be subject to being able to obtain the relevant visa. Charles Russell Speechlys is committed to its effort to ensure there is no modern slavery or trafficking in their organisation or supply chain, details can be found on our Modern Slavery Statement. Charles Russell Speechlys is an equal opportunities employer. We respect and support diversity within our workforce.