

**JOB DESCRIPTION**

# **Trust and Tax Accountant**



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Position	Trust and Tax Accountant
Department	Probate
Reporting to	Team Leader
Office	Bishop's Stortford

### Overall Purpose

To undertake Inheritance Tax and Capital Gains Tax planning and computations for clients of Nockolds Solicitors and Nockolds Wealth and provide support on personal tax and the taxation of trusts and estates.

### Main Tasks

- » Provide general advice on Inheritance and Capital Gains Tax
- » Support the Wills and Probate team and Nockolds Wealth on personal tax and the taxation of trusts and estates.
- » Assist the Wills and Probate Team in drafting Inheritance Tax returns for both trusts and estates.
- » Support the team in advising clients on the taxation implications of any exercise of any trust powers or executors' decisions in the administration of trusts and estates including any ancillary issues such as insurance and pension policies.
- » Drafting the Trust Accounts and, where appropriate returns for the beneficiaries.
- » To assist in the Trust Registration Compliance and be responsible for the online filing of returns for the Probate team and personal clients of the firm in conjunction with other team members.
- » Assist in Trust Registration including liaising with the other affected teams to raise awareness of TR
- » Trust Accounting and administration (including supervision of administrative staff)
- » Preparation of Personal Tax returns for Nockolds Solicitors and Nockolds Wealth clients
- » Assist the Team Leader in promoting the Taxation services internally and externally.

**This job description is not a definitive list or exhaustive list of responsibilities but identifies the key responsibilities.**

## Job Specification

	Essential	Desirable
Education Qualifications	ACA, ACCA or CTA qualification	
Experience	A minimum of 2 year's PQE	
Competencies	Ability to work constructively under pressure Meet deadlines Prioritise in a manner that is beneficial to the client and the Firm Have excellent communication skills	
Other Factors	IT Literate	

21 May 2025

