

Tax Reporting Manager - Job Description

Team: Operations
Reporting to: Executive Director

About Us

We are an independent and privately owned Family Office Services provider, based in Jersey and supporting clients all over the world. Since opening our doors in 2013 we've brought a fresh approach to our market, through our progressive, flexible, and service-focused offer. After a decade of growth, building a strong team, and earning a number of industry awards, we're now adding to our team, and are looking for people who would thrive in an environment where their voice, and their contribution will be invited, heard, and appreciated.

The Role

This role will be responsible for delivering tax compliance and regulatory reporting services that meet client needs, ensuring legal and regulatory requirements are adhered to.

In addition to liaising with clients, agencies, and professional advisers you will act as our internal subject matter expert, provide support to colleagues with technical, legal and tax client issues and guidance to resolve complex and technical matters.

You will also be responsible for ensuring up to date Policies and Procedures are in place and relevant training is delivered internally.

Key Result Areas

- Excellent levels of service in line with company standard, procedures, and guidelines.
- Ensure the Company's legal and regulatory adherence.
- Maintained knowledgebase for tax and regulatory reporting processes and procedures.
- Take responsibility for own personal development, in line with agreed performance objectives and development plans.
- Be a role model and ambassador for Crestbridge Family Office Services.

Key Responsibilities

The list below details the tasks that your role is likely to include. It is not exhaustive and may be amended from time to time:

Tax Reporting Administration (AEOI)

- Coordinate and complete reporting for CFL to ensure timely and accurate reporting to the tax authorities in respect of FATCA/CRS and other tax transparency initiatives that may arise;
- Registering clients with the IRS and Jersey tax authorities where necessary;
- Coordinate tax log in details when required;
- Supporting CFL in respect of the completion of annual tax reviews (change in circumstance reviews);
- Regular monitoring and following up with administration teams for outstanding documentation (including tax compliance reviews, reporting, self-certification forms);
- Understand the FATCA/CRS requirements and processes;
- Ensure tax procedures are followed and kept up to date;
- Provide support to administration teams as necessary;
- Provide status updates and reports in relation to FATCA /CRS matters;

- Liaise with tax advisors and accounting firms to understand the latest tax developments and coordinate advice as needed.

Jersey Tax Filings

- Coordinate and manage clients' corporate Jersey Tax Returns with administration and accounting teams including portal submissions;
- Assist with compliance with Economic Substance and queries thereon.

Other Tax Reporting

- Assist client handling teams with client tax reporting obligations in foreign jurisdictions;
- Maintaining records of clients with foreign tax reporting obligations.

Governance

- Continually seek opportunities to improve procedures and processes to ensure these are as efficient as possible and remain fully compliant with reporting requirements;
- Develop a control framework to test the FATCA/CRS procedures.

Financial Management

- Provide fee quotes to the Business Development team for inclusion in fee proposals for FATCA / CRS related work, where required;
- Work with the Business Development committee to ensure that fee scales remain commensurate with the level of work involved in relation to FATCA / CRS reporting;
- Advise and assist administration teams with determining appropriate tax reporting fee amounts.

Developing Others

- Deliver training in relation to FATCA / CRS reporting procedures;
- As internal subject matter expert, offer support, advice and guidance to colleagues across area of expertise.

General

- Understand the financial drivers of the business and ensure all KPIs and targets are met;
- Monitor, organise and prioritise workload, dealing with matters in a timely manner;
- Lead or participate in other projects as required;
- Willingness to contribute outside the scope of your role, to support your colleagues and the business.

Requirements

Qualifications

- A relevant table 4 qualification.

Knowledge and Experience

- At least 10 years' relevant industry experience.
- Excellent understanding of client financial statements.
- Demonstrable knowledge of AEOI (FATCA/ CRS) legal and regulatory requirements.
- Experience and knowledge of completion of Corporate Jersey Tax Returns
- Advanced knowledge of Microsoft Office, including Excel.
- Comprehensive and detailed understanding and knowledge of the local finance industry legislation and regulatory requirements in which we operate.

Skills and Qualities

- Drive, enthusiasm, and commitment to providing excellent levels of client service.
- A methodical and process driven approach, with first class attention to detail.

- Excellent time management and organisation skills with the ability to remain calm under pressure and prioritise conflicting and demanding deadlines.
- Flexible and collaborative with a desire to support and develop others.
- Ability to assimilate information, manage projects and improve/develop processes.
- Ability to work independently, take responsibility and be proactive.
- Excellent communication skills with the ability to work collaboratively with stakeholders across the business.

Additional Information

We offer all our permanent team members a great benefits package that includes*:

- Competitive salary
- Private healthcare (with no exclusions for pre-existing conditions)
- Life insurance
- Critical illness cover
- Annual leave entitlement of 25 days, with the option to buy or sell up to 5 extra days.
- 3 additional wellbeing days a year
- Discretionary annual bonus
- Support for professional qualifications and ongoing development

**Eligibility for certain benefits will commence after completion of probation. Crestbridge reserves the right to vary or withdraw benefits at any time.*