

# STEWARTS

## Job description

Job title:	Associate (1-4 yrs PQE)
Reporting to:	Partner and/or Head of Department
Department:	Tax Litigation
Purpose of role:	To conduct effectively and efficiently complex tax disputes with HRMC for high-net-worth individuals, owner-managed business and large corporates; to research and identify opportunities for potential future Tax Litigation cases.
Reviewed:	March 2025

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## General overview

Qualified solicitors/barristers must be licensed to practice law to act on behalf of clients in legal matters. The specific nature of the legal work relates to the relevant specialist litigation practice areas of the firm and is set out below.

Solicitors are typically responsible to the head of a work group and/or the Head of Department.

Solicitors must have a current practicing certificate, maintain their learning and development record and comply with the Solicitors Regulation Authority's continuing competency requirements.

## Standard lawyer responsibilities:

- Takes initial instructions, establishing suitability of the matter by undertaking preliminary research and reviewing documentation
- Maintains regular communications with clients, solicitors, supervisors and others on the telephone and in meetings
- Explains fee structure and ensures client is kept apprised regularly of changes in any estimate of fees, providing advice at all stages, pre and post proceedings
- Prepares reports, letters of advice
- Drafts statements
- Selects and instructs experts
- Instructs Counsel
- Compiles Disclosure lists and bundles
- Conducts litigation proceedings
- Appears before the Court at interlocutory hearings
- Demonstrates relevant experience with ADR

- Prepares cost estimates and cost schedules and conducts cost assessment proceedings

### **Expert legal skills:**

The Tax Litigation and Investigations Department specialises in advising clients on tax disputes with HMRC and are experts in the field of tax-related commercial litigation. Acting for high-net-worth individuals, owner-managed businesses and large corporates in judicial review and tax issues. This role is focussed on Tax Litigation with HMRC, both direct and indirect taxes, but also includes responsibility for researching potential new cases for the department, which may include potential commercial litigation which arises from a tax issue (for example, identifying decisions from the Tax Tribunals where an adviser may have been criticised for their advice / may have been negligent giving rise to an adverse decision of the Tribunal).

Solicitors are expected to possess:

- a sound grasp of procedural tax law (i.e. Taxes Management Act), a broad understanding of the key principles of tax law for both direct and indirect taxes, and more general commercial law
- a high degree of familiarity with the Tax Tribunal rules, CPR and the litigation process for disputes with HMRC
- an ability to handle and assess large amounts of documentation and a demanding variety of subject matter
- an ability to work well with fellow team members on larger cases.
- a willingness to work independently whilst exercising good judgement about supervision as and when required

### **Supervisory skills:**

Senior solicitors may supervise other qualified solicitors and most qualified solicitors will have joint responsibility for a paralegal. They will be expected to:

- Delegate effectively to junior lawyers and paralegals, set boundaries and oversee work
- Assign appropriate duties
- Give clear instructions and share information
- Provide regular feedback, offer support and guidance, coach, mentor and motivates
- Consider opportunities for growth and development
- Conduct formal performance appraisals

### **Financial Management skills:**

- Records time effectively, achieves/exceeds hours and billing targets
- Assists with/manages the effective billing and cash collection
- Monitors financial performance and WIP

- Sets, manages and reviews litigation budgets and manages profitability

#### **Business Development skills:**

- As noted above, this role includes responsibility for undertaking research into developments in tax law, HMRC practice and tax case law with a view to identifying opportunities for potential new cases for the department. In practice, the individual will be required to take responsibility for researching and identifying tax developments which are relevant to business development for the department, to prepare a monthly report (similar to a know how review) to the HoD/partners and directors, and to meet with the HoD/partners and directors on a regular basis to discuss and agree next steps.
- Demonstrates commercial awareness and vision
- Attends/assists with/organises social events
- Contributes to marketing materials
- Identifies/generates/follows up new and existing business opportunities
- Develops effective business/client relationships
- Develops own network, raises own and firm profile
- Promotes the firm by undertaking public speaking or having articles published
- Assists with/attends/participates in/leads business pitches
- Develops practise expertise, creates a media presence, becomes a recognised expert in the field, drives the reputation of the firm
- Focuses on business development activities, defines and leads business strategy

#### **Knowledge-sharing skills:**

- Makes use of the firm's collective knowledge resources, promotes internal knowledge-sharing
- Attends and contributes towards know-how meetings, delivers internal training sessions

#### **Academic background:**

- Essential: Minimum 2:1 law degree, with commendation at LPC (or equivalent BVC)
- Desirable: Languages

#### **General skills:**

- Well organised, uses initiative, prioritises appropriately, applies self, shows attention to detail, manages own workload and meets deadlines
- Demonstrates excellent communication and interpersonal skills (respectful, positive, articulate, professional and sympathetic)

- Delivers helpful internal services with a “can do” approach, shows commercial awareness and represents the department/firm appropriately
- Shares information and ideas
- Shows sound judgement and decision-making skills; acts within boundaries
- Shows commitment, passion and enthusiasm
- Is a respectful, reliable and supportive team player
- Reflects the firm’s culture