

Tax Graduate to Senior Tax Consultant

Position Purpose

To provide high-quality taxation compliance, consulting and advisory services that help clients achieve successful business and personal outcomes.

Contribute to the growth of the firm through exceptional client service, technical excellence, continuous professional development, innovation and collaboration while upholding the values and professional standards of Polson Higgs.

Position Scope

The Tax Consultant role is responsible for delivering taxation compliance services, technical research, tax consulting and advisory support to a diverse client portfolio.

The scope and complexity of responsibilities increase as the role progresses from Tax Graduate through to Senior Tax Consultant. Individuals are expected to develop increasing technical expertise, client relationship capability and commercial awareness throughout their career progression.

Team: Tax	Reports to: Tax Manager	Direct Reports: Nil
Key Relationships:	Internal - Partners, Associates and Staff	External - Clients, banks, Inland Revenue, legal advisors, other stakeholders
Purpose and Values	Purpose Better outcomes through smart thinking, trust and a positive approach.	Values Integrity - Doing the right thing Care - Being there Excellence – Best Outcomes



Position Description

Career Framework		
Tax Graduate (0-1 years) • Bachelor of Commerce (Accounting) or equivalent. Or Bachelor of Laws (LLB) • Eligible to commence CAANZ qualification and/or Professional Legal Studies Course (Profs)	Tax Consultant (1-3 years) • Progressing towards CAANZ qualification and/or admission to the bar. • Demonstrate increasing technical capability	Senior Tax Consultant (3+ years/CA Qualified) • Chartered Accountant (CAANZ) qualified Or Admission to the Bar • Ongoing CPD compliance
Expectations • Learns technical tax skills and completes assigned work under supervision. • Develop effective professional working habits. • Learns client service principles and professional communication. • Builds understanding of New Zealand taxation legislation and compliance obligations. • Works towards developing technical competence in tax research and opinion preparation.	Expectations • Begins to plan and manage work independently. • Developing strong client relationships. • Prepares tax opinions and advisory work with guidance. • Develops confidence in client communication and problem solving. • Supports Graduate Tax Consultants through knowledge sharing. • Begins to identify risks, opportunities and value-add services for clients	Expectations • Provides mid-level taxation advice and technical guidance. • Reviews work completed by Graduates and Junior Consultants. • Coaches and mentors team members. • Develops and manages client relationships. • Identifies opportunities for advisory work and business growth. • Contributes to divisional planning, workflow management and team development. • Supports technical training and knowledge-sharing initiatives across the firm.

Position Description

Capabilities - Learning	Capabilities -	Capabilities - Managing
Technical – Guided Client Interaction – Support role Problem Solving – Assisted Team Support – Learns from others and actively seeks guidance Business Development – Aware of networking opportunities and begins to understand their value Leadership – Understands team and firm strategy and contributes positively to team culture.	Technical – Developing Client Interaction – Developing relationships Problem Solving – Developing independence Team Support – Assists peers and shares knowledge Business Development – Participates in marketing and networking activities Leadership – Begins to apply understanding of business strategy in day-to-day decision making.	Technical – Reviews, advises and provides technical leadership Client Interaction – Trusted advisor with direct client relationships Problem Solving – Identifies issues and develops solutions Team Support – Coaches and develops staff Business Development – Builds networks and seeks opportunities for firm growth Leadership – Assists with divisional goals, workflow management and strategic initiatives.

Key Position Responsibilities

Tax Responsibilities	Relationship Management
• Prepare accurate, timely and commercially relevant taxation compliance and advisory work. • Prepare income tax returns and GST returns. • Prepare tax calculations and tax effect accounting adjustments. • Complete taxation research and legislative analysis. • Prepare technical memoranda and tax opinions. • Assist with Inland Revenue reviews, correspondence and investigations. • Work individually and collaboratively on consulting and compliance assignments. • Work across a broad range of clients including trusts, companies, farming businesses, property investors and corporate groups. • Identify tax risks and opportunities affecting clients	• Participate in firm and divisional marketing initiatives. • Attend networking and client events. • Build professional networks within the business community. • Identify opportunities to introduce additional firm services. • Promote the firm's reputation through positive client interactions. • Participate in proposals, presentations and new business opportunities

Position Description

Client Responsibilities • Engage with clients to understand needs and objectives. • Develop trusted relationships through responsive service. • Demonstrate sound taxation and business knowledge. • Develop practical and commercially focused solutions. • Work with Managers and Partners to resolve client issues. • Senior Tax Consultants may undertake review functions and lead client meetings.	Systems Knowledge Developing proficiency or proficiency in: • XPM • Microsoft 365 including Excel • FYI • Tax research platforms • Approved digital and AI-enabled tools used responsibly and professionally.
Technical Knowledge Demonstrates developing knowledge of: • Income Tax • GST • Trust Taxation • Property Taxation • Company Taxation • Tax Administration Act requirements • Inland Revenue processes • Compliance and regulatory obligations • Tax risk identification and management • New Zealand taxation legislation and case law	

Professional and Firm Responsibilities

Communication

- Communicate confidently, professionally and effectively with clients, colleagues and stakeholders.
- All written and verbal communication is clear and concise.
- Progress, completion of tasks and potential issues are proactively communicated to managers.
- Give and receive feedback constructively and proactively communicate progress, issues and decisions.

Performance Development Review (PDR)

- Participate actively in goal setting and performance development reviews.
- Take ownership and have active engagement of agreed personal and professional development actions.
- Opportunities for personal and professional development taken.

Professional Standards

- Always maintain ethical and professional conduct.
- Comply with CAANZ requirements where applicable.
- Documentation and emails are correctly maintained on FYI/MS teams.
- Protect client confidentiality, information security and the reputation of the firm.

Position Description

Health and Safety

- Comply with Polson Higgs Health and Safety policies, procedures and current legislation.
- Report hazards, risks, incidents and accidents through appropriate procedures.
- Support a safe and healthy working environment for colleagues and clients.

Other

- Undertake other reasonable duties required of the position.

Key Attributes

Core Competencies

Performance delivery – delivers quality work and meets budget and time frame requirements.

Professional judgement and effectiveness – applies sound judgement and communicates effectively.

Collaboration and client engagements – works effectively with clients and colleagues.

Technical skills – demonstrates technical proficiency and ongoing development

Personal Attributes

- Plans and prioritises effectively, using appropriate resources to achieve deadlines and goals.
- Demonstrates accountability, initiative and a high standard of professional behaviour.
- Remains calm, responsive and solutions-focused when priorities change.
- Shows curiosity, commercial awareness and a commitment to continuous improvement.
- Builds trust through integrity, care, reliability and constructive leadership.

Key Success Measures

- Client deadlines achieved
- Work completed within budget or agreed timeframes
- Minimal file review points or rework involved
- Positive client and manager feedback
- Achievement of PDR goals
- Progress towards and completion of CA qualification and/or admission to the bar.
- Compliance with quality assurance and professional standards
- Consistent use of firm technology and workflow systems, in accordance with professional standards.