



# Example of Reporting Team Leader Job Description

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Our growing company is searching for experienced candidates for the position of reporting team leader. If you are looking for an exciting place to work, please take a look at the list of qualifications below.

## Responsibilities for reporting team leader

- Provide leadership of team and across other groups by sharing knowledge as appropriate
- Provide objective and regular feedback to team members
- Conduct performance review and appraisal of team members
- Working closely with Manager(s) on various processes/projects, such as being assigned to take the lead and/or assist to implement new processes in order to help the team be successful in its goals and KPIs
- Ensure Statement processes & controls are compliant with regulations and firm policies, prepared for growth, and supportive of successful business continuity
- Manage service relationship and communication around client statement changes
- Manage the tax onboarding team tasked with reviewing documentation received for new customers and ensure accuracy from a FATCA perspective
- Identify situations that could arise which indicate U.S. indicia or inconsistencies between the KYC documents received and the W-8 form
- Identify Changes in circumstances on existing accounts in accordance with requirements under the Internal Revenue Code
- Tax form validation

## Qualifications for reporting team leader

- Work closely with the relevant contacts within our investment management

- Experience in a relevant client administration and reporting role
- An understanding of the operations processes
- The ability to communicate effectively, both with clients and internally
- The ability to adapt to multiple demands and priorities in a pressurised environment