



Example of Tax Operations Analyst Job Description

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Our innovative and growing company is looking to fill the role of tax operations analyst. To join our growing team, please review the list of responsibilities and qualifications.

Responsibilities for tax operations analyst

- Robust client service
- Tax Service for Direct Investments
- Contact for client requests with respect to international source tax and respective collaboration with the global tax team
- Inquiries Management & Tax Information distribution to our clients
- Contact for client requests, regulator and internal issues
- Support various Global Business Units (Prime Brokerage, PWM, FX, Client On-Boarding,) through the collection, validation, and re-solicitation of tax documentation where required and work through resolution of tax form issues with the various business units and clients
- The position is within the Tax Operations Group, whose primary responsibility is to maximise client's investments by either facilitating effective tax relief at source on our client investment income or retrospectively reclaiming taxes from global tax authorities
- Responsible for collection and validation of all applicable client documentation within strict SLA guidelines
- Implement any determined impact to the CIB Custody business of all tax related newsflashes
- Regular review of Documentation reclaim items to resolve all 'non-document' related items

Qualifications for tax operations analyst

- Understanding of current holistic BAU operating model and impacts of changes on the operating model
- Strategic vision for the future operating model taking into consideration 24 hour clock, global localities, and shorter time frames for deliverables
- Ability to document clear and concise complex requirements for technology developers
- Able to work well in a team and independently with offshore resources
- A relevant tertiary qualification in finance or accounts