

POSITION DESCRIPTION

Title:	Tax Compliance Consultant (TCC)
Employee:	Generic
Business Unit:	Tax Refunds (Sales & Customer Services)
Reports to:	Team Leader
Location:	7 Marine Square, College Road, Hermanus, 7200, Western Cape, South Africa
Job Grade:	C1, C4
Effective Date:	1 February 2020

Our Values

The culture across the FinGlobal Group is one where “customers are at the heart of everything we do” and our employees bring this culture to life by behaving in line with our unique values which are:

❖ Customer first ❖ Trust ❖ Respect ❖ Unleash potential ❖ Ideas into action

These values drive our performance, enhance our reputation, and position us for the future.

The Role

The Tax Compliance Consultant (TCC) is a key member of the Sales & Customer Services team reporting to the Tax Refund Team Leader. This role is responsible for all tax compliance matters pertaining to the services FinGlobal Group render to its customers.

Compliance to tax laws and regulations is the responsibility of this role to ensure successful end-to-end delivery of customer outcomes. This role will facilitate and administer all processes necessary to achieve mutually agreed customer outcomes. It will furthermore act as conduit between the business and its customers (*after customer accepts quote for service/s*), taking responsibility for all communications to ensure information is supplied to FinGlobal Group in a prompt fashion whilst also keeping customers informed on progress until outcomes are successfully achieved. This role requires the incumbent to liaise with customers, internal FinGlobal Group staff and external service providers and partners.

Key Accountabilities

Deliver customer solutions

- a) Assist customers not registered with SARS to activate their account/s via e-filing.
- b) Assist customers registered with SARS to activate inactive account/s.
- c) Assist customers registered with SARS with outstanding returns.
- d) Assist registered customers with active SARS accounts.
- e) Administer SARS system changes on behalf of customer.
- f) Prepare and submit final tax return on behalf of customer.
- g) Administer tax refunds on behalf of customer.

- h) Identify customers with companies and/or trusts and recommend specific course of action based on financial status of such companies/ trusts.
- i) Obtain tax clearance certificate for customer/s.
- j) Work collaboratively with Customer Services Representatives (CSR) and Financial Consultants (FC) on all matters that will enable value to be realised for the customer and FinGlobal Group alike.
- k) Update processes and work practices to meet changing demands of SARS legislation and offices.
- l) Continuously look for better ways to conduct business and improve processes.
- m) Ad-hoc requests as per instruction from the Team Leader.

Customer communication

- a) Establish good customer report to ensure a quality relationship between FinGlobal Group and its customer.
- b) Provide clear, accurate and consistent communication, enabling customers to respond with information, feedback, documentation, etc. in a prompt fashion.
- c) Guide and assist customers with the completion of any paperwork/system inputs.
- d) Regularly follow-up with customers to reduce service turn-around time.
- e) Keep customers informed on progress.
- f) Connect customers with internal specialists (if necessary) and follow-up on progress of service rendered.
- g) Ensure customer 'notes' are entered into CRM system.
- h) Ensure all assigned open notes and emails are adequately addressed within agreed timeframes and closed/saved when resolved (*actively manage open notes and emails*).
- i) Update electronic customer files with the appropriate documentation.
- j) Intercept calls on behalf of colleagues when absent from workstation.
- k) Adhere to FinGlobal Group customer communication guidelines.

Learning and development

Available and willing to learn existing and new processes that may be added to the FinGlobal Group suite of products/services from time to time.

Compliance

- a) Comply with all company standard operating procedures (SOPs), policies, guidelines and procedures.
- b) Comply with all regulatory rules including but not limited to FSCA, FAIS and SARB.
- c) Comply with all applicable regulations and legislation from regulators and organisations such as FSCA and SARS.

Key Performance Indicators (KPI's)

Proficiency in this role may be measured using some or all the stated KPI's; but, also not limited or restricted to those indicated in below table.

KPI	Reason	Description
Lead time	To actively manage and continuously improve process turn-around-time	Number of customer requests in WIP <u>divide by</u> average completion rate
Revenue realised	To direct effort on outcomes, adding value to customers and the business respectively	Total revenue realised based on the number and value of transactions completed on a monthly, quarterly and annual basis

KPI	Reason	Description
Customer service cancellations	To work collaboratively with Financial Consultants (FC)/ to ensure customer requirements are met. Getting this right will contribute towards the reduction of rework and improvement of process turn-around-times	Number of customers who cancelled their services with FinGlobal Group after service delivery has commenced
Quote accuracy		Number of customer transactions where a difference between the 'quoted service fee' and 'actual service fee' were noted
Quality of customer interaction and communication	To promote effective customer communication and interaction (<i>to establish high quality customer relationships to ignite cooperation and urgency towards achieving outcomes</i>)	Peer and management review to determine the quality of customer communication and interaction
Quality of communication and interaction with 'Sales & Customer Services' staff	To promote effective communication and interactions with 'Sales & Customer Services' staff	360° review of communication and interaction with 'Sales & Customer Services' staff

Key Relationships

Internal and external relationships; level of interaction and purpose.

Internal

Primary

- Team Leader – to seek advice, direction and guidance on delivery of successful customer outcomes.
- 'Sales & Customer Services' team members – to ensure customer requirements are met within expected timeframe and quality standards. Financial Consultant/s (FC) – to ensure customer needs and requirements are well understood and changes in customer circumstances are acknowledge and appropriately actioned.

Secondary

- CRM system (Salesforce) support – to liaise with subject matter experts to ensure the system is continuously improved to ensure more effective processes and data integrity.
- Business Intelligence & Reporting – cooperate with subject matter experts to enhance customer insights capability, organisation wide.
- Risk and Compliance – to consult and seek advice on financial / business risks, controls, mitigating actions and response.

External

- Customers.
- Service providers and partners.

Core Competencies

At FinGlobal Group, we have identified the competencies that are required to be successful. These competencies help define how we do our role and recognise the behaviours that we need to display on a daily basis. The required competencies for this role are:

Competency	Description
Managing Relationships	Works to build and maintain warm, friendly and constructive relationships with colleagues and business partners; is responsive to the needs, feelings and opinions of others.
Ability to plan and organize	Able to prioritize and plan multiple tasks and yet be flexible and adaptable in revising plans and priorities on short notice to achieve objectives.
Sense of urgency	Able to cope with pressure and show ability to deal with urgent matters.
Action Orientation	Initiates action to achieve objectives within set deadlines and pro-actively takes responsibility for achieving work objectives and shows willingness to go the extra mile.
Decision-making	Able to come to a conclusion or decision, whether it be to further an investigation or for purposes of recommendation / escalation to management.
Resilience	Able to tolerate and persevere in a reactive environment. The tolerance to deal with conflicting information. Displaying the perseverance, energy and drive to persist, despite interruptions and unforeseen / unexpected changes until tasks have been successfully completed. Able to deal with ambiguity.
Systems knowledge	Familiar and proficient with MS Office (Outlook, Word and Excel). Sound understanding and proficiency with FinGlobal Group CRM system (Salesforce).
Product Knowledge	Advance knowledge of the products and/or services FinGlobal Group offers to their customers locally and internationally.
Adaptability	Willingness to learn and adjust to a changing work environment.
Co-operation & teamwork	Co-operative in planning and striving to see that the goals and objectives of the company are being realized.

Role requirements

The candidate needs to have proven expertise in business and technical facets of the role including the following:

- a) **Grade 12 required, BComm degree majoring in tax or other similar tax qualification recommended**
- b) **Exposure to and/or theoretical knowledge of FICA legislation required.**
- c) **More than two years' experience in a reasonably complex process orientated environment of which at least 2 years must be within the Financial Services industry recommended.**
- d) **Registered Tax Practitioner accreditation is not a requirement, but a recommendation.**
- e) **Experience in SARS e-filing would be advantageous.**
- f) Proven ability to be self-motivated and work autonomously, while also working successfully within a team.
- g) Proven organisational skills including the ability to prioritise work to ensure deadlines are consistently achieved.
- h) Strong attention to detail and follow through.
- i) Excellent telephone manner and confident on the phone.
- j) High degree of initiative and motivation.
- k) Demonstrated inclusive, collaborative and engaging approach; including the ability to consult, facilitate, negotiate and influence a broad range of people at all levels in a medium sized corporate environment.
- l) An ability to work under pressure in a rapidly changing environment.
- m) Solid skills in stakeholder management and developing trusted and enduring relationships with customers.
- n) Sophisticated verbal & written communications skills (English & Afrikaans) with excellent grammar & spelling.
- o) Ability to write clearly, courteously and professionally as well as heightened e-mail etiquette.

- p) Strong interpersonal skills coupled within a resilient yet enthusiastic life disposition, including the ability to remain calm in dynamic situations and project with sunny poise and aura.
- q) Demonstrated and applied knowledge of relevant regulatory and compliance frameworks.

Additional information

Employment Engagement

This is a one-year fixed contract position with FinGlobal Group. The incumbent will be employed under an employment contract which specifies employment terms and conditions including salary.

Workplace Health and Safety

The role holder of this position must comply with workplace health and safety requirements and policies. As part of your role, you will also ensure other team members also comply with FinGlobal Group workplace health and safety requirements and policies.

Risk and Compliance

As a primary role-player in the process of complying with regulatory requirements your responsibility is to be conversant with, and to implement the requirements specific to your role; including the continues identification, analysis and escalations of risks within your team. As part of the normal performance review cycle, you will also encourage and reward open and transparent reporting of errors and behaviours which contribute positively to the desired risk and compliance culture.

Confirmation Signatures

	Name	Date	Signature
Employee:			
HR representative:			
Reporting Manager:			



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