



Chartered
Institute of
Taxation.

LITRG Technical Officer

Role Information Pack
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Welcome

Thank you for showing interest in the LITRG Technical Officer role(s). The CIOT is an educational charity and the leading professional body in the UK for tax advisers and tax technicians dealing with all aspects of taxation. If successful, you will be joining a dedicated team of staff and volunteers who ensure that we continue to meet our primary purpose of promoting education in taxation. Our key aim is to achieve a more efficient and less complex tax system for all, and you will see from our annual reports that we do this through a wide range of activities.

At the CIOT our vision is to remain the leading bodies for taxation professionals in the United Kingdom, serving the public interest through the pursuit of excellence and with integrity, and we're looking for people who are excited about joining us on our journey. To help us achieve our vision we're looking for exceptional people who live our values and behaviours and who can inspire others; embrace change; deliver results and keep it simple.

We live by our values which are:

Ethical - We act with integrity, promoting high ethical standards and accepting accountability for our actions.

Collaborative - We value working constructively with stakeholders to achieve our goals.

Inclusive - We welcome, respect, and value everyone and actively consider how to be accessible.

Empowering - We encourage and enable personal growth and seize opportunities.

Progressive - We are future focused; constantly learning and driving improvements that deliver enhanced service excellence.

Committed - We are focused on and dedicated to the consistent delivery of our charitable objectives and services.

We know that an inclusive environment makes us more accessible and ensures we attract, engage, promote, and retain exceptional people. We welcome applications from all individuals regardless of age, gender/gender identity, sexual orientation, ethnicity/nationality, disability, or military service and welcome those who have taken career breaks. We will consider flexible working arrangements or home working arrangements for any of our roles and offer workplace accommodations to ensure you have what you need to effectively deliver in your role.

We're organisations which were founded by ordinary people who were dedicated to making tax as simple as possible for the public and providing qualifications that are open to all. Our members and volunteers come together to help each other get the most from their Professional Bodies and enhance their future careers. If you come to work here at the CIOT, you'll be part of that. Part of something a bit different. And something really quite special.

What's more, we have a strong ethic of care for each other and our members. We recognise that our employees feel most appreciated when their thoughts and values are respected and considered. We're committed to creating a culture that recognises and truly values our individual differences and identities. So, if you'd like to be a part of an inclusive workplace where you can be yourself, where your talents are nurtured, and you feel empowered to contribute, then please apply.

Helen Whiteman

Chief Executive, CIOT



The Organisation (CIOT)

The CIOT is the leading body in the UK for taxation professionals dealing with all aspects of taxation. Our primary purpose is to promote education in taxation. One of our key aims is to achieve a more efficient and less complex tax system for all. Our comments and recommendations on tax issues are made solely in order to achieve this aim; we are an entirely apolitical organisation.

Membership of the CIOT is by examination, nationally recognised as the gold standard of UK taxation education. We support our 20,000 members and 5,000 students throughout their tax careers, providing assistance through our London-based head office and worldwide network of 40 branches.

The CIOT is a registered charity, number 1037771 and a regulatory body for the purposes of Anti-Money Laundering supervision of tax practitioners.

The CIOT is a member of the Confédération Fiscale Européenne (CFE) and is registered under the European Commission's Transparency register, number 91596579174-61.

The CIOT is managed by its Chief Executive and directors, under the strategic guidance of the Council.

The CIOT is a company established under Royal Charter. Its governing documents comprise the Charter, Byelaws, Member Regulations, and Council Regulations.

Policy on fund raising from the public:

The CIOT does not raise funds through asking for public donations in any form.

For the Annual Report and Financial Statements of the Institute visit: <https://www.tax.org.uk/annual-reports>.



Low Incomes Tax Reform Group team

The Low Incomes Tax Reform Group (LITRG) is an initiative of the CIOT. . Since 1998, LITRG has been working to improve the policy and processes of the tax, tax credits and associated welfare systems for the benefit for those who are least able to afford to pay for professional advice.

The LITRG team is made up of the Head of LITRG, Senior Manager, 6 technical officers and a team administrator. We are also supported by a website manager from the IT team and our external relations team. Our technical staff are all qualified to Chartered Tax Adviser level. Team members are passionate about using their technical knowledge and experience to help others to navigate the tax system – particularly those less able to afford to pay for professional advice.

LITRG's mission statement is to 'target for help and information those least able in the community to afford to pay for advice and make a real difference to their understanding of the systems of taxation and related benefits whilst working to make them more equitable and accessible for their needs'. We do this by providing information on the tax system and related welfare benefits, primarily through the LITRG website and through a range of activities such as:

- Encouraging government agencies, primarily HMRC, to produce the very best information for all taxpayers, especially those who are least able to pay for professional advice.
- Analysing the interaction between the tax, tax credits and benefit systems to understand potential interactions and how changes in one system may have an effect elsewhere.
- Responding to consultations and requests for evidence from government departments and parliamentary committees.
- Researching particular tax areas that may be giving cause for concern and writing reports recommending change.
- Examining Finance Bills and other tax legislation for provisions which may adversely affect those who are least able to pay for professional advice, providing briefings on the legislation's effect on this group and proposing alternatives.
- Monitoring operational developments within HMRC, DWP and other related government departments which may affect those who are least able to pay for professional advice.
- Sitting on numerous tax and benefit consultative groups and putting forward the perspective of those who cannot afford to pay for professional advice.

Our strategy for 2025 has the unrepresented taxpayer at the centre as we look for new ways to reach more taxpayers and ensure that we are reflecting the taxpayer voice in our work.



Role description

Job Purpose

To help the CIOT's Low Incomes Tax Reform Group to achieve its two objectives:

1. Providing technically accurate and easy-to-read/accessible guidance on tax and interacting welfare benefits for low-income taxpayers (usually online but occasionally in print).
2. Improving the tax system, its administration and related welfare benefits – via written output and representing the organisation in meetings with relevant internal and external stakeholders.

We are recruiting for two LITRG Technical Officers. Ideally we would like one person with a small business background and one person with more of a personal tax/private client background.

Operating Environment

You will work with the LITRG team and other technical staff within the organisation to ensure that LITRG's output is technically accurate and understandable, maintaining LITRG's reputation as a trusted source of guidance on tax and related matters relevant to the low-income taxpayer. Organisational processes and procedures must be followed.

You must be able to demonstrate awareness of how our output (whether written or oral) is received / viewed externally, maintaining professionalism and remaining non-political at all times.

Framework & Boundaries

You will have technical work areas assigned to you as lead technical officer and other areas where you may be supporting other team members. You will identify issues/government consultations etc coming up in your area of expertise and flag them to the LITRG Senior Manager/Head of LITRG to agree whether work should be done on them. You may also be assigned specific tasks with deadlines to meet. This will include peer reviewing work and giving feedback following your review.

You are required to monitor areas/pages of the website assigned to you and update them as required. Each year, there is an annual updating exercise between January and April.

Key accountabilities

- Producing tax technical output (e.g. reports, consultation responses, briefings, articles, website materials) to a high standard (technically accurate and appropriate to the target audience), including updating existing materials and peer reviewing work for technical accuracy
- Identifying issues within allocated areas of work and making proposals for actions to address them, e.g. by suggesting new guidance materials, articles or producing a paper/report with recommendations
- Liaising with and taking issues forward working together with appropriate stakeholders, e.g. HMRC officials (in writing or in meetings), Parliamentary committees (including giving oral evidence), other voluntary sector organisations
- Answering queries from professionals or the general public, following organisational processes
- Promoting LITRG's work, e.g. by representing LITRG at events, giving seminars/lectures and taking part in appropriate media opportunities

Job impact (desired impact of this role)

Your allocated work is produced to a high standard, generating positive feedback from stakeholders (e.g. website users, readers of technical articles) and upholding LITRG's reputation as a trusted source of tax guidance and a go-to source for those looking to consult with us (e.g. officials, media contacts).

Skills needed to fulfil the role

Knowledge and experience

- Membership of the CIOT or otherwise qualified to an equivalent level by experience (e.g. ATT or other accountancy qualification + demonstrable experience)
- At least five years' practical experience of personal tax compliance and advisory work, at a level undertaken by a tax manager in practice – e.g. managing a portfolio of clients.
- Some knowledge of child benefit, tax credits and the transition to universal credit. An interest in digital matters and the problems faced by the digitally excluded is important.

Ideally, we would like one successful candidate to focus their time on our guidance and policy work in relation to those who are self-employed, run their own limited companies or who work through umbrella companies or agencies. This includes contributing to our work on HMRC's making tax digital programme. You should have a strong knowledge of the tax issues facing small businesses and be familiar with using tax and accounting software and interacting digitally with HMRC.

We would like the other successful candidate to have proven experience working in a personal tax/private client environment with extensive experience of both tax compliance and advisory services for individuals. Experience in advising on international tax matters for individuals would be beneficial, along with other traditional private client tax issues, such as capital gains tax, varied income sources, pensions, and a working knowledge of inheritance tax and trusts. A deep understanding of HMRC's self-assessment system is essential, along with a good understanding of alternative tax collection methods such as PAYE coding adjustments and simple assessment.

Functional/technical skills

- Thoroughly research tax technical issues, converting such research into technically accurate, evidenced written output
- Write in an accessible style, making tax technical guidance understandable to the general public including those with lower levels of literacy and numeracy
- Think beyond tax technical issues to other practical issues affecting unrepresented taxpayers, e.g. digital exclusion
- Work to tight deadlines without loss of accuracy. Attention to detail is essential
- Apply your knowledge to new proposals or to come up with new ideas for change
- Competent use Microsoft Office Apps – Outlook, Word (producing documents within set templates, tracking changes on others' work, using tables), Excel (e.g. using basic formulae for tax calculations and similar) and Powerpoint (producing a simple presentation)

Interpersonal and work management Skills

- Communicate professionally, confidently, and effectively with others including external stakeholders (which may include the media)
- Assimilate and clearly articulate LITRG's agreed position
- Exercise judgement and respect boundaries, to ensure that output is well received, balanced, factual, and non-political
- Work independently and using your own initiative, but with an appreciation that your work needs to fit LITRG's overall objectives so may be subject to change/direction as needed
- Recognise when team working is required and where potential problem areas need to be escalated
- Manage your time and identify priorities to balancing competing deadlines, raising any issues before problems arise

Salary & Benefits

package

Salary

We are recruiting one full time technical officer for 35 hours per week and one part time role for 28 hours per week. The salary for this role is circa £77,953.08 (FTE), (pro-rated for the part time role), per annum. The role is a remote role with occasional travel for meetings and events both at our main office and other locations.

Pension

Upon joining, you will be automatically enrolled into the Aviva Group Pension Plan (9% employer and 3% employee contribution).

Insurance

- Income protection cover which provides up to 75% of salary if you are absent due to ill health for more than 13 weeks.
- 24-hour group personal accident scheme providing a sum equal to three times current salary in the event of your permanent disability/ loss of a limb/ death.
- Non-contributory life assurance cover of 4 times your salary.

Holiday entitlement

The organisation offers a generous holiday entitlement from 25 - 30 days depending on your length of service, and pro-rated based on your working pattern.

Optional Benefits

Bupa (private medical insurance)

You can join our company-paid private medical insurance scheme which pays for the cost of private medical treatment for acute conditions.

Healthshield Essentials (including Employee Assistance Programme)

You can join our health & benefit programme. We pay the cost for the basic level (including any dependent children). The benefits include the refund of a range of medical costs (dental, optical, physiotherapy etc) and an employee helpline covering medical and legal issues and counselling.

Interest Free Loans

After 6 months service you may apply for an interest free loan to help with the purchase of a season ticket or a bicycle.

Continuous Professional Development

The Chartered Institute of Taxation requires all professional employees to maintain their CPD activities and offers an exciting range of learning opportunities through its branch and conference programmes.



Guidance notes for applicants

Thank you for considering working with us. These notes are designed to help you through our application process. However, if you have any questions regarding the process that are not covered here, please do not hesitate to contact Sharon Jepson at sjepson@ciot.org.uk for advice.

The deadline for applications is 16 April 2025 by 5 pm.

You can apply by submitting a covering letter and up to date CV via email to Sharon as per the email address provided above. Your covering letter should make it clear how your skills and experience match those described in the advert or job description. You should also indicate if you are interested in the full time or part time position or both.

If you wish to find out more about the role before applying you may do so by emailing sjepson@ciot.org.uk or by calling HR on 02073400563. This will not prejudice your application in any way.

If you do not hear from us within 2 weeks of applying this means that you have not been shortlisted on this occasion. Failure to be shortlisted for one role does not bar you from applying for others when they are advertised.

If you are invited to interview you must confirm your attendance by the deadline stated in the invitation email. This will be a two-stage interview process with initial interviews likely to be end of April. There will also be a written exercise to complete before the first interview.

If you do not do so we will assume you are no longer interested. If there is to be a presentation or test you will be informed of this in advance.

If you have a disability and require special arrangements to be made, please notify us as soon as you are shortlisted so we can try to accommodate your needs.

You will be told during the interview when you may expect to hear the outcome.

Although we appreciate the time and effort that goes into applying for a post with us, we do not give individual feedback on applications or interview performance.

Successful candidates will be required to provide their original qualifications, proof of the right to work in the UK and the details of two referees before they commence employment.

We look forward to receiving your application.

