

About Matt Boggis

Matt is a Client Manager and Team Leader at Creaseys Group Limited who are a top 100 independent accountancy firm.

He works in the Private Client Tax Team. Matt completed his CTA in November 2018 and won four awards.

The Institute Medal, which is awarded to the examination candidate with the best overall performance attempting the Awareness paper and two Advisory papers (now known as Advanced Technical) papers (all at the same sitting).

The Spofforth Medal, awarded to a candidate with the highest mark in the Inheritance Tax, Trusts & Estates Advisory (now known as Advanced Technical) paper.

The Chris Jones Prize, awarded to the examination candidate with the highest total marks in two Advisory papers (now known as Advanced Technical) papers (taken at the same sitting).

The Croner-i Prize awarded to the examination candidate with the highest distinction mark.

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MATT BOGGIS

CTA



Interview

What made you decide to study for the CTA qualification?

It all began after graduating from University. I mentioned to a friend, who worked at Creaseys, that a career in accountancy and tax was on my radar. He gave me some useful insight into the finer workings of the industry.

This encouraged me to find out more myself. In 2012 I joined my friend at Creaseys as a trainee within the accounts team and it was here I decided to study the AAT and ACA.

Yet when I got the chance to work in the Tax Department during a busy period at the firm, it was clear I wanted to broaden my technical knowledge and be a part of the Chartered Institute of Taxation. Studying for the CTA was a logical step, a no-brainer.

As a training firm, Creaseys supports staff with their training from the moment they join the business. They supported me through the AAT, ACA and CTA. They covered all my training courses, exam fees and travel expenses and gave me study days to use for revision. I am lucky to have a great team around me who work collaboratively, which means that client work doesn't suffer while team members are out of the office studying for extended periods.

I now work in the Private Client Tax Team, managing a portfolio of around 150 clients and advising high net-worth clients on income tax, capital gains tax and inheritance tax matters. A large proportion of my clients work in Private Equity. I also advise clients looking to move to/from the UK.

What does your day-to-day role involve?

Day-to-day, I work on interesting advisory projects and meet with many clients to learn more about them and to understand their bigger picture. I enjoy the variety of clients with their different personalities, goals, worries and ways of working. Each one is different. I also spend time developing and coaching other members of the team.

Last August I became a team leader. This means I am responsible for developing members of the tax team, helping them set objectives, supporting their studies and personal development plans within the firm.

How has achieving the CTA qualification helped your career?

Achieving the CTA qualification has been valuable in consolidating my existing knowledge and strengthening my technical knowledge in areas that I haven't often come across. It's made me a better-rounded tax adviser and given me more confidence, particularly in identifying opportunities and risk areas.

Qualifying as a CTA, winning four CTA awards and becoming a member of the CIOT has been the highlight of my career so far.

What advice would you give to someone thinking of doing the CTA qualification?

My advice to anyone who is thinking about doing the CTA qualification is to go for it. The hard work is rewarding and worth it. It uses many skills and you don't need to memorise every single section of tax legislation to pass.

Taking three exams in one sitting was tough and I was out of the office for extended periods of time. I am lucky that the colleagues assisting on my clients were able to step in and deal with any urgent matters whilst I was away.

Time management and prioritising was key. I always got revision out of the way, straight after work and early in the morning at weekends, meaning I could then relax and enjoy myself without feeling guilty that I wasn't studying.

My long term ambition is to continue my progression at Creaseys. Internal progression and development is encouraged and it is motivating to be rewarded for performing well. I'm excited about having the opportunity to input on departmental matters, helping to shape the Private Client team and push them forward.

