



Chartered
Institute of
Taxation.

Professional Standards Officer

Role Information Pack
March 2025

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Welcome

Thank you for showing interest in the Professional Standards Officer role. The CIOT and ATT are educational charities and the leading professional bodies 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 and ATT 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 an organisation which was 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 ATT and 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.

Jane Ashton

ATT CEO

Helen Whiteman

Chief Executive, CIOT



About the CIOT and ATT

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 network of 35 branches. The CIOT is a registered charity, number 1037771, a chartered corporation 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 Chartered corporation established under Royal Charter. Its governing documents comprise the Charter, Byelaws, Member Regulations and Council Regulations. The CIOT does not raise funds through asking for public donations in any form.

The primary charitable objective of the ATT is to promote education and the study of tax administration and practice. One of our key aims is to provide an appropriate qualification for individuals who undertake tax compliance work. Drawing on our members' practical experience and knowledge, we contribute to consultations on the development of the UK tax system and seek to ensure that, for the general public, it is workable and as fair as possible. Our members are qualified by examination and practical experience. They commit to the highest standards of professional conduct and ensure that their tax knowledge is constantly kept up to date. Members may be found in private practice, commerce and industry, government and academia.



Role description

Job Purpose

This role requires the individual appointed to work collaboratively within the ATT/CIOT governance structure, the Joint Professional Standards Committee (JPSC), the joint CIOT/ATT professional standards team, and the wider organisation to ensure that the professional and compliance standards are up to date, fit for purpose, conform to statutory requirements where relevant and are adhered to by CIOT and ATT members.

Operating Environment

The objects of the CIOT and ATT include the requirements:

(i) to prevent crime and

(ii) to promote the sound administration of the law for the public benefit by promoting and enforcing standards of professional conduct amongst those engaged in the provision of advice and services in relation to taxation and monitoring and supervising their compliance with money laundering legislation.

Each body is a statutory AML Supervisor.

Framework & Boundaries

The framework is provided by our governing documents and also by the Professional Standards requirements placed on members <https://www.tax.org.uk/ciot-professional-standards-member-rules> and <https://www.att.org.uk/> (Professional Standards tab). We are also bound by the requirements of the Money Laundering Regulations and associated legislation and the OPBAS Sourcebook requirements.

Key accountabilities

- Assisting the Head of Professional Standards and Professional Standards Manager with Professional Standards policy and guidance work
- Working as part of the team, and with IT and external IT providers to ensure the annual AML renewal process and Annual Return process runs smoothly
- Carrying out the CPD audit and PII checks
- Updating website material for both the ATT and CIOT
- Carrying out research for and writing initial drafts of consultation responses
- Setting up and attending working party meetings
- Preparing statistics and papers for meetings
- Clearing cases of non-compliance arising from the Annual return and AML registrations
- Answering member queries about professional standards matters
- Preparing presentations and handouts and delivering talks by way of webinars or in person events
- Writing Tax Adviser articles.
- Processing and reviewing AML new registrations including the issue of fees and referrals for disciplinary action
- Undertaking AML risk reviews of firms
- Contributing to the AML visit programme

Skills needed to fulfil the role

Knowledge and experience

- Practical experience of working in tax or an AML position
- A relevant accountancy or tax qualification
- Knowledge of AML legislation and experience of it being applied in practice Functional/technical skills
- Knowledge of relevant legislation and CIOT/ATT's rules and guidance
- Good working knowledge of relevant software packages, including case management systems, CRM, Click Dimensions, Word, Excel and Power Point Interpersonal and work management Skills
- Excellent interpersonal and customer service skills
- Excellent written and verbal communication skills
- Capable and comfortable with carrying out AML visits both remotely and in person
- Attention to detail
- Problem solving skills

Salary & Benefits package

Salary

The salary for this role is £46,000 – £52,000 per annum, 35 hours per week (remote).

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 by 31 March 2025.

You can apply by submitting a covering letter and up to date CV via email to sjepson@ciot.org.uk. Your covering letter should make it clear how your skills and experience match those described in the advert or job description.

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. This post will be resourced through a two- stage interview process.

If you are invited to interview you must confirm your attendance by the deadline stated in the invitation email. 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.

