Group Tax Manager (July ’25)

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| **Budget:** | C£200k inc salaries and consultancy costs, c£50m of tax take | **Function:** | *Simplyhealth Group of Companies - Finance* |
| **Line Manager:** | *Director of Financial Governance & Accounting* | **Direct Reports:** | 1 |
| **Our Vision** | | | |
| Improving access to healthcare for all in the UK to:   * Lead your best life * Prevent you from getting a disease you’re at risk of * Access the best in care (digital where possible, physical where necessary) * Manage your long-term condition | | | |
| **Your Role** | | | |
| The Group Tax Manager is responsible for timely, consistent and accurate delivery of draft tax reporting throughout the group. These reports, returns and associated payments will include but not be limited to, VAT, Corporation Tax, IPT and payroll taxes, presented for review, by the Chief Financial Officer / Director of Financial & Regulatory Accounting. The Group Tax Manager is also responsible for managing all Tax Risk and providing assurance to the Chief Financial Officer in regard to the SAO compliance process, and for leading the relationship with the group’s CRM at HMRC.  The role also involves assisting and advising the group in internal and external taxation matters to enable optimisation of the tax position and a high quality of data. There is one Tax Accountants as a direct report. They will act as a source of tax expertise, assisting the Director of Financial & Regulatory Accounting in the interpretation of tax and regulatory standards as required.  The Group Tax Manager will be a key player in ensuring that our tax data and digital reporting is of the highest integrity, complying with all standards, regulations and legislation and in doing so reinforce our trusted brand of Simplyhealth which underpins our ability to serve our core purpose, which is to improve access to healthcare, for the many, for the long term.  They will maintain a close working relationship with a range of external bodies including the external (and internal) auditors, regulators and external accountants, working within agreed risk appetites.  As a member of the Finance Team be part of a “one team, one purpose” culture, supporting an environment where collaboration leads to dynamic partnerships and where diversity of perspectives is encouraged, a “can do” culture exists, ideas are shared and challenge embraced; supporting the Finance Organisation to develop and innovate together to create robust, sustainable solutions and outcomes for the longer term.  The role holder will be confident in their skills and ability, operating mostly within familiar areas and boundaries of their role.  They will have ownership for achieving and improving personal performance, acting on opportunities in their role and seeking new opportunities to develop. A focus will be on achieving personal goals/daily targets and having a personal impact on the goals set for the wider team. They will be open to personal feedback and work on leveraging strengths in their development areas whilst building positive relationships with team members and stakeholders, showing an awareness of different perspectives and styles. They will be confident to speak up in meetings and state their opinions, spotting opportunities and escalating issues to improve their own performance and processes and costs at team level. They will follow well defined priorities within a given framework and manage with a small degree of ambiguity and will have a clear understanding of how their role fits into the bigger picture and show curiosity to understand the bigger picture. | | | |
| **Your Responsibilities & Accountabilities:** | | | |
| 1. Financial Tax Accounting and controls    * Monitor and maintain appropriate tax policies and procedures in order to ensure accurate information is delivered to Management and the Board.    * Monitor and maintain a robust tax control environment to ensure that Simplyhealth acts in accordance with HMRC standards and group policies, establishing efficient and effective working practises across the finance function    * Responsible for ensuring that draft tax reporting for all legal entities is in accordance with HMRC legislation, including dispensations and arrangements.    * Producing draft board committee papers as required. 2. Tax    * Lead with external support in the development of the tax strategy of all group companies in respect of taxation matters    * Understand and interpret the rules and requirements in relation to statutory and regulatory taxation reporting, in particular Solvency II and Senior Accounting Officer (SAO) requirements    * Identify suitable external tax advisers, managing the external relationships to ensure maximum benefit is achieved for the group, and manage the expenditure of tax fees within budget    * Assess all major project proposals to identify tax efficiency opportunities and to inform Simplyhealth’s Leadership Team as part of all commercial decision-making processes    * Provide a central point of contact for all tax-related queries across the business, sourcing suitable external advice where relevant    * Actively engage with all business areas to inform the strategic decision-making process in all tax-affecting matters, to include employee, product and contract matters and advising on the interaction of taxes in all aspects    * To provide advice on employment taxation issues, supporting the HR department as required and specifically to ensure that the Group’s contracts of employment and HR policies are fully compliant with current tax legislation    * Prepare and deliver in-house tax training material across the group    * Identify tax risks above the agreed Simplyhealth risk appetite and make recommendations to manage these risks    * Support the delivery of an annual programme of work to manage all tax risks in line with the Simplyhealth risk appetite    * Provide tax support, advice and guidance to the Group’s operating businesses in line with the Simplyhealth risk appetites, balancing the tax risks with achievement of Simplyhealth’s strategic and commercial goals    * To support the other areas with the Finance and Business Assurance functions by providing advice and guidance on tax legislative and regulatory requirements and provide guidance and support for HMRC compliance visits    * Prepare and / or approve as appropriate quarterly CT and DT forecasts and provide tax input to Solvency stress testing scenarios to optimise Simplyhealth’s effective tax rate    * Review and approve calculations for all Direct and Indirect taxation returns and payments prepared by the Tax Team    * To provide training on tax matters to ensure the management of tax risk within the organisation as required    * Support, as required and directed, Simplyhealth’s strategic growth strategy and ensure tax risks are properly assessed and managed, including ensuring a rigorous approach to due diligence and integration, to include leading taxation work streams 3. Driving improvements in all the areas of responsibility, including line management of members of staff, conducting performance reviews and monthly 1:1’s with each member of your team reviewing and setting meaningful and challenging objectives and competencies in line with business needs. 4. Ensure that you work in a safe manner and remain up to date and comply with the Health & Safety policy statement and procedures and report any incidents to your line manager 5. Monitor all colleagues under your control, to ensure they work in a safe manner at all times and are abiding by the Health & Safety policy statement and procedures. 6. Liaising with the company Safety, Health & Environment Manager to ensure your department has the correct number of first aiders and fire wardens along with reporting any incidents and near misses | | | |

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| **Key Connections:** |
| 1. Chief Financial Officer 2. Chief People Officer 3. Director of Financial & Regulatory Accounting 4. External Auditors 5. HMRC 6. Product Development |
| **Key Experience:** |
| Technical   * **Professional knowledge** *–* The job requires specific tax knowledge in both direct and indirect taxes, ideally both through a recognised CCAB qualification and CTA qualified. * **Business expertise** *–* The job requires a good knowledge of how it contributes to the overall goals of the business. This requires comprehensive knowledge of several areas both outside and within the finance function and how their processes and resources interact with the other areas of the wider group. A good understanding of the insurance industry is also considered ideal. * **Problem solving** *–* The job covers a wide range of activities that require complex judgements and solutions based on sophisticated analytical thought comparing and selecting complex alternatives. In-depth analysis with interpretative thinking will be required to define problems and develop innovative solutions.   Behavioural  **Anticipate and Accelerate – explaining clearly, analysing problems, seeing opportunities**   * + Spotting opportunities and escalating issues to improve business performance and processes and costs at team level.   + Follow well defined priorities and prioritising within a given framework providing clarity in complex technical matters.   + Clear understanding how your role fits into the bigger picture. Showing curiosity to understand the bigger picture.   **Drive – self-belief, using initiative, aspiring to succeed**   * Confident in skills and ability at level, operating mostly within familiar areas and boundaries of role, regularly steps out of personal comfort zone. * Ownership for achieving and improving personal performance, acting on opportunities in role and seeking new opportunities to develop. * A focus on achieving personal goals/daily targets and having a personal impact on the goals set for the wider team.   **Partner and Trust – inspiring and engaging others, understanding others, understanding myself**   * Open to personal feedback and works on leveraging strengths in the development areas. * Builds positive relationships with team members and stakeholders, aware of different perspectives and styles. * Credibility based on a good track record. Confidence to speak up in meetings and state your opinions. |
| **Our Values** |
| Health and access to healthcare have never been more important. With this comes endless exciting possibilities for innovation and growth. The market is evolving quickly, so we need to ensure our customers have access to the leading-edge health solutions they expect and deserve, now and for generations to come.  **We’re living in extraordinary times…**    By reinventing ourselves, we will reach more customers, giving them increased access to affordable healthcare and unlocking our growth potential. This next chapter is about transformational change for us.  **This is our time to survive, drive and thrive…**  This is our chance to get ahead and stay ahead. We will ensure our commercial success by moving into new areas of healthcare, and leading with preventative, breakthrough solutions. We will use innovative digital tools, embracing technology to create new partnerships and opportunities. We are passionate about helping every generation lead better lives and get the care they need in real time.  To make this a reality, we need to challenge our ways of working, whilst keeping the customer at the heart of everything we do. To *really* make a difference, it’ll take every single one of us across Simplyhealth to step up.  **Our cultural movement...**  To act with **courage and curiosity**, so we can unlock the opportunities to help customers, colleagues and communities. To operate with **trust and kindness**, working alongside customers, delivering what they need to live their best lives, as well as supporting colleagues as they strive to be their best. Spotlight our passion for **All together healthier**, focusing on self-care and nurturing relationships. We must ensure we are a strong team - one that’s able to build healthier lives for all. We each have an important role to play in this next chapter. Everyone has the freedom to innovate and make a difference for our customers. We need to act at pace and take on newer, braver, creative approaches. We shouldn’t be afraid to fail fast and learn quickly. By being curious and continually pushing ourselves and each other, we will find new and better ways. |
| **Our Behaviours** |
| |  |  |  | | --- | --- | --- | | Courage and Curiosity | Trust and Kindness | All Together Healthier | | ***So we deliver profits for a purpose*** | ***Because our customers, colleagues and communities are at the heart of what we do*** | ***Enabling better health outcomes together*** | | * We make bold decisions and take considered risks, with customer and commerciality front of mind. * We make things happen and keep things simple. * We always take the initiative and hold ourselves accountable for the delivery of great results. * We ask questions and listen intently as every viewpoint and capability counts, and we have the courage to be honest and say what we think. | * We invest in relationships to build trust and rapport. * We listen carefully always trying to find ways to add value. * We treat each other with care, compassion and kindness, celebrating and embracing differences. * We strive to make a difference in society, unlocking opportunities for those in need. | * We help every generation take control of their health. * We start with self-care so we can show up at our best, every day. * We are full of energy and pride in what we do. We focus on self-development to learn and grow, so we can stay up to date and add value. * We innovate and collaborate on our best ideas. Together, we can drive the changes that are needed to help our business grow, and help our customers live their best lives. | |
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| * **We have a ‘smart working’ policy with flexible remote working. However, there may be a requirement to attend meetings at our Hampshire head office in line with government guidelines.** * Some UK travel & overnight stays. * Reasonable role and task flexibility expected given the seniority of the role. * May be required to lead other business activities or projects in other parts of the Simplyhealth Group. |