

JOB DESCRIPTION

Job Title: Tax Operations Team Leader
Reporting to: President
Line Reports: Operations Analysts (x4)
Location: London or New York

About Acupay

Acupay System LLC is a worldwide leader in cross-border tax certification of payments of dividends and interest by issuers of securities to investors without excess withholding of tax. Acupay's revolutionary systems and technological platforms allow issuers, custodians, brokers and investors from all over the world to reduce excess foreign taxes on cross-border securities holdings, assure full compliance and effectively deliver tax relief on billions worth securities, including cases where it was previously operationally unfeasible.

Acupay is a privately/employee-owned company based in New York and London specializing in international and domestic financial communications and instruction processing. As we move into new and broader markets, we expect our growth to continue and are looking for new team members who will integrate well and become part of that success

Purpose of Role

The Tax Operations Team Leader oversees a team of four Operations Analysts and has overall responsibility to ensure the smooth processing of data and documents, and to provide high quality system guidance and support to clients and external stakeholders using the Acupay System or Acupay's outsourcing solution TPS.

Key Responsibilities

- Accurately process and monitor tax relief requests (Relief at Source, Quick Refund, and Long Form Reclaims) in line with internal policies and the requirements of foreign tax agencies. Assume responsibility for the Operations Team's performance against set targets
- Liaising with users of the Acupay System and TPS, constantly striving to offer exceptional customer service. Building strong client relationships and cross-selling other services
- Building, supervising and motivating an excellent team of operational staff, leading them to achieve clear and meaningful team and individual objectives
- In collaboration with the Product Management and IT teams, identify and develop new systems to ensure tax compliance and relief while continuously improving old processes looking for efficiencies and minimising risks
- Creating operational processes, procedures and policies for new markets or driven by new regulatory or legal requirements. To that end, monitoring and reviewing tax law changes that affect existing operational processes, procedures and policies
- Overseeing data quality and preparing data elements for billing purposes
- Reviewing securities offering documentation to ensure synchronisation with operational processes
- Maintain professional competence by complying at all times with the training and competence procedures of the company
- Assist with corporate actions projects by our sister firm Bondholder Communications Group
- To undertake any other reasonable duties as deemed appropriate by management, commensurate with the level of the post so as to ensure the smooth running of Acupay

REVIEW ARRANGEMENTS

This job description cannot be all encompassing. It is inevitable over time that the emphasis of the job will change without changing the general character of the job or the level of duties and responsibilities entailed. Consequently, this information will be periodically reviewed, revised and updated in consultation with the post holder to reflect appropriate changes.

Skills and Experience

ESSENTIAL

- Knowledge of withholding tax management and understanding of custody back office and relevant business & computer systems
- Ability to manage people and/or to demonstrate a commitment to developing leadership skills
- Excellent written and verbal communication skills in English, including client communication and ability to mark up legal/procedural documents
- Proficient knowledge of Microsoft Office software
- Ability to assist in operational planning in the short, medium and long-term business environments
- Strong client focus and ability to lead client meetings and conference calls.
- Excellent attention to detail
- Proven ability to prioritise their own workload as well as that of others, to work to their own initiative and to identify improvements on an ongoing basis.
- Enthusiastic, self-driven, willing to go the extra mile and work at own initiative.
- Ability to work under pressure, to work independently as well as to be a team player, particularly across different sites and time zones.

DESIRABLE

- Knowledge of other languages would be beneficial
- Knowledge of mechanics behind corporate actions such as bondholder identifications, tender and exchange offers would advance any application