



Charlton  
Baker

## **Job Description - Senior Client Portfolio Manager**

We're Charlton Baker, an award-winning, people-first accountancy and advisory firm with a reputation for doing things differently. From our roots in Devizes to supporting clients across the UK, we believe in real relationships, radical honesty, and giving people the freedom to thrive.

We're looking for a Senior Client Portfolio Manager to join Team CB - someone who enjoys being the person clients trust, teammates rely on, and the business grows around. You'll take ownership of a varied client portfolio, support the development of others, and play an active role in shaping how we deliver great work as we continue to grow.

**Location:** Thatcham, minimum of 3 days per week

**Hours:** 37.5 hours per week

**Salary:** £40,000

**Contract length:** Permanent

### **Purpose of the Role**

As a Senior Client Portfolio Manager, you will lead your own portfolio of clients and act as a cultural ambassador across Charlton Baker. You'll be supporting senior team members with accounts prep, and have a strong focus on corporate tax. You'll be hands-on in managing client relationships, delivering high-quality advice and compliance services, mentoring others, and supporting the development of our wider practice.

### **Key Responsibilities**

- Manage a client portfolio: annual accounts, corporation and personal tax returns, onboarding, ongoing support, ensuring statutory deadlines are met.
- Preparation of more complex statutory accounts for senior team member review.
- Reviewing work of junior staff.
- Preparation of required tax returns for filing with HMRC including corporation tax, partnership tax, personal tax and P11ds.
- Ensure a high level of client satisfaction and retention.
- Lead, mentor and inspire team members, including trainees.
- Promote Charlton Baker in the local community and through professional networks.
- Identify opportunities to add value through our wider accounting, tax and advisory services.
- Driving efficiencies, system and process improvements.
- Meet prospective clients and convert opportunities.
- Collaborate across the group to optimise workflows and resources.

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- Ensure billing, client service, and documentation is accurate and timely.

### **Required skills**

- Qualified accountant (ACCA/ICAEW or equivalent experience)
- Strong technical knowledge of UK GAAP.
- Strong corporate tax knowledge and experience.
- Strong leadership, team engagement and people development skills.
- Commercial judgement - understanding how your portfolio contributes to the firm's success.
- Excellent relationship management, promoting trust, providing proactive advice and collaborating on clients' business goals.
- Experienced with modern accounting software & approaches (specifically QuickBooks, Xero, TaxCalc, Dext, BrightManager etc would be advantageous).

### **Values & Behaviours**

- Lead with integrity, empathy, and resilience.
- Communicate clearly and transparently.
- Foster collaboration and continuous learning.
- Be decisive, adaptable, and always focused on positive impact.
- Live our values: radical honesty, real relationships, freedom with responsibility.

You'll be part of a friendly, ambitious team where you're trusted to do your best work and supported to grow. We offer clear development pathways, flexible working, and a culture built on respect, collaboration, and genuine care - for our clients and each other.

Find out more about us, our culture, and this role on our website.

### **Ready to apply?**

Just send us a CV. We don't use AI to screen applications - every CV is read by a real person. We'd love to hear your genuine voice, so please make sure your CV is personal to you and tailored to this role.

### **Accessibility & Inclusion**

We know that everyone needs different things to do their best in a recruitment process. We want to give everyone the chance to shine, and we're committed to making our process as inclusive and accessible as possible.

That's why we do a few things as standard, including:

- Sharing interview questions in advance so you can prepare your thoughts.
- Being clear about what to expect and what we're looking for at each stage of the process.
- Offering a choice between video and in-person interviews.





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If there's anything else that would help you show us your best self, just let us know. We'll always do our best to accommodate what works for you.

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