



Job Description - Client Portfolio Manager

Job Title: Client Portfolio Manager

Reporting line: Practice Manager

Location: Trowbridge, minimum of 3 days per week

Working hours: 37.5 hours per week, part time considered

Salary band: Circa £35,000, DOE

Contract length: Permanent

Purpose of the Role

To work with a wide range of clients, helping them keep on top of their day-to-day finances and preparing accurate accounts that tell the real story of their business.

You'll prepare year-end accounts for review by our senior team. You'll build great relationships with clients, answering their queries, spotting opportunities to help, and making sure they feel supported every step of the way.

Key Responsibilities

- Year-end accounts preparation and supporting senior accountants with reviews (If required)
- Communicating directly with clients to resolve queries and provide proactive advice
- Supporting the continuous improvement of systems and processes within the team
- Keeping your technical knowledge up to date and sharing ideas with colleagues

Required skills

You'll be someone who enjoys variety and takes pride in getting things right first time. You'll be confident talking to clients, organised in your work, and keen to learn and grow within your role.

- Experience working in an accountancy practice
- Familiarity with cloud accounting software
- Some experience in accounts preparation (or the appetite to learn)
- AAT level 4 Qualified as a minimum, and/or studying towards ACCA, or qualified by experience.





Values & Behaviours

- A proactive approach and a passion for helping clients succeed
- Pride and ownership of work.
- Clear and respectful communication.
- Continuous learning and improvement.
- Commitment to helping both clients and colleagues succeed.
- Lives our values: real relationships, radical honesty, freedom with responsibility, embrace the new.

