



Job Description Form

(Generic) Taxation Officer

Taxation Services

Position details

Classification Level: 4

Award/Agreement: Public Service Award 1992 / Public Sector CSA Agreement 2019

Position Status: Permanent

Organisation Unit: Public Trustee, Business Services

Physical Location: Perth CBD

Reporting relationships

Responsible to: 005972 Manager Taxation – Level 7

This position: (Generic) Taxation Officer - Level 4

Direct reports: NIL

Overview of the position

The Business Services Directorate comprises the Taxation Services, Business Support and Investment Branches.

The Taxation Services Branch is accountable for the efficient and effective management of the taxation affairs of clients of the Public Trustee including the preparation and lodgement of taxation returns.

The Taxation Officer (L4) is responsible for assisting with the preparation of taxation returns with a simple to medium level of complexity using the electronic lodgement software and the Australian Taxation Office Online Service for Agents. The position liaises with the Australian Taxation Office on procedural/processing issues and assists with branch administrative matters.

Job description

As part of the Taxation Services Branch team, the successful applicant will be expected to:

- Work to improve communication and model integrity and respect in all interactions
- Operate within the Department's Corporate Governance Framework, policies and procedures and ensure effective transparency and accountability of all Department activity
- Operate within the chain of command to coordinate activities required to meet the Department's strategic objectives
- Work collaboratively to achieve common goals and best practice and facilitate business improvements as appropriate
- Facilitate cultural and management reforms within the Department through leadership and engagement
- Represent the Department's interest on committees and working groups as required.

Role specific responsibilities

- Assesses the taxation needs of clients with simple to medium level complexity (with asset values below \$400,000) and refers complex files to Senior Taxation Officers.
- Prepares income tax returns and tax file number applications for the clients of the Public Trustee including represented persons, court trusts, agencies, deceased estates and other trusts of a medium complexity level and up to an asset value of \$400,000.
- Provides general assistance to Public Trustee Staff on Taxation and section administrative matters.
- Assists with the compilation of statistical reports for the Corporate Executive.
- Conducts research and analysis and collates financial data for the preparation of taxation returns.
- Liaises and negotiates with the Australian Taxation Office on procedural issues.
- Collaborates with internal and external stakeholders as required.
- Assists with the coordination and presentation of staff training in taxation matters.
- Complies with the Public Trustee policies and procedures for taxation related matters.
- Other duties as required in accordance with strategic objectives, business plans, local workload priorities and performance management plans.

Job related requirements

In the context of the role specific responsibilities, the ability to demonstrate the following skills, knowledge and experience.

Shapes and Manages Strategy

The ability to; understand the reasons for decisions and how they are related to their work, understand the work environment and identify issues that may impact own achievement and contributes to team planning, draw on information from a range of sources and to use common sense to analyse what information is important, anticipate

issues that could impact on tasks and identify risks and uncertainties in procedures and tasks are all important for this role.

Achieve Results

The ability to; monitor progress against performance expectations to ensure deadlines are met, communicate outcomes to supervisor, apply and develop capabilities to meet performance expectations, demonstrate knowledge of new programs, products or services relevant to the position, work to agreed priorities, outcomes and resources and be responsive to changes in requirements are fundamental to this role.

Builds Productive Relationships

The capacity to; build and maintain relationships with team members, other teams, colleagues and clients, share information with team members, seek input from others, contribute to team discussions and ensure that others are kept informed, maintain an awareness of personalities, motivations and diverse qualities, treat people with respect and courtesy and an ability to act on constructive feedback.

Exemplifies Personal Integrity and Self-Awareness

An ability to; listen when own ideas are challenged, provide accurate advice to colleagues and clients and to check and confirm the accuracy of information prior to release, take responsibility for mistakes and learn from them, acknowledge when in the wrong, seek advice and assistance from colleagues and supervisor when uncertain. Engage with risk by providing accurate information, seeking guidance when required and reporting potential risk issues to supervisor.

Communicates and Influences Effectively

A demonstrated ability to; structure messages clearly and succinctly orally and in writing, focus on gaining a clear understanding of others comments by listening and questioning for clarity, check that own views have been understood, listen to differing ideas to develop an understanding of the issues are essential in this role.

Role Specific Criteria

- An understanding of, and experience in taxation matters.

Special requirements/equipment

Nil

Certification

The details contained in this document are an accurate statement of the duties, responsibilities and other requirements of the job.

Public Trustee

Signature: _____ Date: 22/10/2020

HR certification date: November 2020