



Senior Tax Manager

Ready to take your tax career to the next level?

DPM is the leading Australian financial services firm for the medical profession, with offices in Melbourne and Sydney, specialising in tailored tax and financial advice.

Our growing Sydney team is on the lookout for a confident, experienced Senior Tax Manager who's passionate about growth and delivering exceptional client experience.

If you're a charismatic expert with a sharp mind and a heart for service, this is your chance to make your mark with a forward-thinking firm that supports a high-net-worth client base.

Ambitious about partnership? So are we. This role has a clear path to partnership for the right individual.

Key responsibilities include:

- Owning, growing and servicing a portfolio of medical clients as key Client Service Partner
- Meeting with medical professional clients and assessing their issues and concerns
- Providing tailored taxation advice and liaising with DPM wealth, lending and insurance consultants to provide a holistic financial offering
- Collaborating with a diverse team of onshore and offshore accountants and dedicated client experience administrators to complete high-level complexity tax returns and financial accounts, Business Activity Statements, and Instalments Activity Statements
- Working with experienced tax advisers and partners on complex tax matters to refine and develop deep technical expertise
- Mentoring, developing and training the next generation of accountants and tax advisers
- Participating in client events/functions and developing relationships with key stakeholders
- Meeting service delivery targets, including workflow, productivity, revenue and expectations of clients

The full position description is available on the next page

What's in it for you?

Join DPM and experience a rewarding career with a host of benefits designed to support your professional growth and personal well-being

- Flexible working: We support a hybrid model that balances time in the office and working from home
- Extra leave: benefit from 5 additional paid leave days each year
- Professional growth: stay ahead of the curve with ongoing learning, development opportunities, and access to mentoring from experienced partners and senior leaders
- Prime location: work from our modern, centrally located CBD office on Castlereagh Street
- Social connection: we value strong relationships, both in and out of the workplace, with a calendar of events and activities to stay connected

You will be successful because you are:

- Experienced in a technical tax & accounting role with substantial client-facing experience
- CA/ CPA qualified
- An excellent communicator, with great verbal and written skills
- Confident and able to develop and maintain effective client relationships

Consultant – Tax

Division:	Tax & Accounting
Department:	Tax
Manager/ Team Leader:	Client Consultant Lead - Tax
Position description review:	January 2025

Purpose

The Consultant is responsible for providing a comprehensive, high quality and timely service to clients in their relevant specialised area and actively engages and promotes DPM's 'Financial Peace of Mind' Model.

What does success look like for this role?

- The client's financial peace of mind is at the forefront of all consultation related activities with clients
- Client relationships are maintained via high levels of service and appropriate/timely communication
- Effective strategies are developed and presented to clients considering their needs and best interests
- Clients are referred to other service areas of the business where necessary
- Tax knowledge is frequently kept up to date in accordance with legislative requirements

Responsibilities

Client Focus

- Provide comprehensive, high quality and timely service to clients
- Investigate and develop effective strategies according to client needs
- Formulate and present business proposals and presentations
- Review, develop, maintain and monitor client relationships
- Manage and maintain a high level of confidentiality with client information
- Meet assigned budget/targets
- Ensure client related information is accurate and meets DPM record standards

Business Development

- Explore opportunities for new business/referrals within the DPM client base
- Collaborate across DPM to build cross-business referrals
- Promote and market other services of DPM to the client base



Technical Expertise

- Understand all areas of legal regulations affecting relevant industry
- Maintain strong, expert knowledge of the financial market/relevant industry
- Monitor/report potential changes within relevant industry that may impact business/clients
- Apply/maintain best practice principles in client service delivery for relevant division

Compliance

- Adhere to relevant industry legislation/governing bodies/ DPM policies/standard processes
- Maintain relevant industry training and licensing requirements

General

- Contribute to continuous improvement in service delivery/process improvements
- Work collaboratively with Consultants across DPM to develop effective referral strategies that build/promote DPM's 'Financial Peace of Mind' Model
- Coach/mentor/share knowledge with Consultants/colleagues across DPM/relevant division

Qualifications, Skills & Experience

- Relevant tertiary qualifications and substantial experience in a similar position
- Proven experience creating new business opportunities and is results orientated
- Demonstrated ability to develop and maintain strong business relationships
- Demonstrated ability to develop effective strategies to maximise client outcomes
- Demonstrated ability to think and plan strategically
- Excellent oral, written and presentation skills
- Demonstrated ability to work autonomously whilst building/maintaining relationships in a team environment



- Highly proficient in preparing financial accounts, income tax returns, and activity statements for individuals, companies, discretionary, unit, and hybrid trusts and partnerships
- Proficient in Xero, XPM or similar, and Microsoft Office suite. Experienced with FYI docs (*desirable*)

Interested?

If you're ready to take the next step in your tax career and make a real impact in the financial lives of medical professionals, we want to hear from you!

Candidates that wow us will be contacted for an interview immediately.

To be eligible, you must be an Australian Citizen/ Permanent Resident or have full working rights.