

Account Manager / Project Manager

Triple Bottom Line Accounting Limited (TBLA)

Salary c£40 – 45K

About TBLA

Triple Bottom Line Accounting Limited is a B Corp–certified accountancy practice supporting purpose-driven SMEs and entrepreneurs. We go beyond traditional compliance to help clients achieve financial success alongside positive social and environmental impact.

Our Mission: To support clients in achieving financial success alongside positive social and environmental impact.

Our Vision: To be a leading force in transforming accountancy, inspiring SMEs to embrace a triple bottom line approach and collectively build a more sustainable and equitable future.

Our Values: Caring | Professional | Progressive | Accountable

TBLA welcomes applications regardless of race, religion, colour, gender identity, sexual orientation, age, disability, nationality, or any other protected characteristic.

The Opportunity

As TBLA continues to grow and senior leadership transitions into more strategic and advisory-focused roles, we are seeking an Account Manager / Project Manager to take ownership of client delivery, relationships, and day-to-day portfolio management.

This is a key hire for the firm. You will combine strong technical accounting capability with commercial awareness, judgement, and genuine care for clients. You will be trusted with autonomy and responsibility while being supported to grow into a senior leadership position within the practice.

This role suits someone who thrives on ownership rather than instruction, values outcomes over activity, and wants their work to contribute to meaningful impact for SMEs and the wider economy.

Role Overview

You will act as the primary point of contact for a portfolio of clients, ensuring high-quality delivery of accounting, tax, and advisory services. You will manage work end-to-end — from planning and review through to client communication and final delivery — while collaborating with internal team members and our outsourced bookkeeping partners.

You will be expected to think beyond compliance, helping clients understand their numbers, identify risks and opportunities, and make better commercial and sustainability-aligned decisions.

Key Responsibilities & Measurable Objectives

The following responsibilities are core to this role. These align with TBLA's strategic direction and have been established to ensure clarity from the outset, enabling effective accountability and performance measurement.

1. Client & Portfolio Ownership and Support

- Manage an assigned portfolio of clients end-to-end with minimal supervision
- Act as the primary relationship owner, building trusted, long-term partnerships
- Communicate confidently and professionally, providing clear, practical, and timely advice
- Take full accountability for quality, deadlines, and client experience
- Respond to client correspondence within 72 hours and proactively manage expectations
- Prioritise outcomes and client impact over task completion
- Monitor client satisfaction through regular touchpoints and feedback mechanisms

2. Technical Accounting & Tax Delivery

- Prepare and review statutory accounts independently to professional standards
- Prepare, review, and interpret management accounts for client decision-making
- Oversee UK tax compliance including corporation tax, VAT, and personal tax basics
- **Complete statutory accounts within 0–6 months of year-end date**
- **Complete company directors' self-assessments alongside company accounts to reduce January/December pressure**
- Apply strong technical knowledge with commercial judgement
- Identify issues, risks, and opportunities — not just process transactions
- Maintain compliance while supporting client growth and decision-making

3. Tax Planning & Advisory

- Maintain and regularly update tax plans for all clients in your portfolio
- Ensure each client understands their tax position and planning opportunities
- Support clients beyond compliance, helping them understand performance and cash flow
- Translate financial data into clear insights and actionable recommendations
- Think in terms of outputs and outcomes, not just inputs and processes
- Contribute to management accounting, forecasting, and advisory engagements
- Proactively identify opportunities to upsell additional value-adding services

- Support clients in aligning financial decisions with sustainability and impact goals where appropriate

4. Outsourcing & Workflow Management

- Work closely with TBLA's outsourced bookkeeping partner
- Review outsourced work for accuracy, completeness, and quality before client delivery
- Provide clear instructions, feedback, and guidance to outsourced teams
- Take full ownership of final client deliverables regardless of who prepared underlying work
- **Identify opportunities to delegate appropriate work to outsourced partners, improving efficiency**
- Contribute to developing and refining outsourcing processes and workflow design

5. Team Collaboration & Development

- Work collaboratively with internal team
- Support delegation of appropriate work to and from team members
- Provide mentorship and support to junior team members where appropriate
- Understand the capacity, confidence, and capability of team members when delegating
- Create psychological safety for team members to ask questions, seek clarification, and learn without fear

6. Operational & Commercial Responsibility

- Plan and manage your workload to meet client deadlines and service standards
- Ensure work is delivered profitably and within agreed scopes
- Maintain accurate time recording and work-in-progress tracking
- Identify when work exceeds scope and manage additional fees professionally with clients
- Issue invoices promptly upon work completion or at agreed interim project stages
- Maintain awareness of costs incurred on client work and ensure full cost recovery
- Support efficient use of practice management systems and processes

7. Leadership Mindset & Strategic Contribution

- Embrace TBLA's mission, vision, and values — or be genuinely open to them
- Take increasing responsibility as senior leadership focuses on strategy and growth
- Be proactive, reliable, and comfortable making decisions with appropriate judgement
- Contribute ideas to improve systems, workflows, and client experience
- Commit to continuous learning, development, and improvement
- Engage deeply with the job description — regularly assess your confidence and performance across each area

- Participate in identifying and developing new revenue streams to support practice growth

8. Compliance, Risk & Sustainability

- Act in line with TBLA's B Corp commitments and ethical standards
- Maintain AML (Anti-Money Laundering) and GDPR compliance across your client portfolio
- Identify and escalate risks proactively to senior leadership
- Promote responsible business practices and sustainability awareness with clients
- Ensure all work adheres to professional standards and regulatory requirements

What We're Looking For

Essential

- ACA or ACCA qualified
- Strong technical accounting and UK tax knowledge
- Experience managing a client portfolio independently in practice
- Confident written and verbal communicator
- Highly reliable, organised, and comfortable working autonomously
- Strong judgement and accountability mindset
- Alignment with, or genuine openness to, TBLA's values

Highly Valued (But Not Essential)

- Experience working with outsourced or offshore bookkeeping teams
- Advisory-led or commercially focused background
- Strong analytical and problem-solving skills
- Interest in sustainability, ESG, carbon accounting, or B Corp principles
- Ambition to grow into a senior or leadership role

The Mindset That Succeeds at TBLA

This role is suitable for someone who is:

- Curious and opens to better ways of working
- Capable of thinking independently and critically
- Caring deeply about quality, outcomes, and client impact
- Comfortable taking ownership rather than waiting for instruction
- Prepared to take ownership when things go wrong and step up to fix the system, not just the symptom.
- Ready to grow alongside a purpose-driven firm

Why Join TBLA

- A senior, trusted role with real autonomy and responsibility
- Work with purpose-driven SMEs and entrepreneurs

- Exposure to meaningful advisory work beyond traditional compliance
- Clear progression pathway as the firm continues to evolve
- Flexible and hybrid working arrangements
- Profit-sharing bonus scheme
- Opportunity to help shape how the firm operates and grows
- Be part of a business that genuinely values people, planet, and profit

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Please send your CV and a letter of application to
hello@triplebottomlineaccounting.com