

Junior Staff talent standard

Global Tax and Legal Deloitte Private

Building a *globally uniform level of quality and capability* in our core services so that our clients experience a *consistent, exceptional Deloitte* is critical to become the undisputed leader in professional services. The following standard defines the capabilities required at the Junior Staff level for our Deloitte Private service line.

Leadership capabilities

We expect practitioners at all levels to embrace and live our purpose by challenging themselves to identify issues that are most important for our clients, our people, and for society and *make an impact that matters*. There are five Leadership capabilities that we require from all Junior Staff across the organization, regardless of service line. Behavioral anchors for each capability are described below.

Capability	Description	Behavioral anchors
Living Our Purpose	Builds own understanding of our purpose and values; explores opportunities for impact	<ul style="list-style-type: none"> Behaves in accordance with Deloitte values Consistently challenges self to deliver outstanding quality and value Recognizes and explores opportunities for personal impact on clients and for colleagues and communities
Talent Development	Demonstrates strong commitment to personal learning and development; acts as a brand ambassador to help attract top talent	<ul style="list-style-type: none"> Solicits feedback to build understanding of own strengths and areas for development Actively participates in key learning and development opportunities for his/her level Acts as a brand ambassador with peers and colleagues to support attraction of top talent
Performance Drive	Understands expectations and demonstrates personal accountability for keeping performance on track	<ul style="list-style-type: none"> Ensures he/she is clear on expectations and asks clarifying questions when needed Is aware of own strengths and uses them effectively to deliver high quality results Assumes personal responsibility for achieving results and supports the team by taking on additional responsibilities when needed
Influence	Actively focuses on developing effective communication and relationship-building skills	<ul style="list-style-type: none"> Engages with others to build relationships and develop a network Demonstrates ability to understand the underlying interests and expectations of others Respects and responds with sensitivity to the concerns and viewpoints of others
Strategic Direction	Understands how their daily work contributes to the priorities of the team and the business	<ul style="list-style-type: none"> Understands objectives and desired outcomes for assigned areas of responsibility and sets personal goals accordingly Seeks to understand how specific areas of responsibility contribute to broader business objectives and outcomes

Core Professional and Technical capabilities

Below are the Core Professional and Technical capabilities for Deloitte Private Junior Staff:

Capability	Description	Behavioral anchors
Tax Laws and Rules	Develops knowledge of current tax legislation across the Global Tax and Legal function	<ul style="list-style-type: none"> Develops knowledge of relevant tax rules and regulations and their associated processes to formulate solutions for client problems Conducts research and uses appropriate facts, analysis, and conclusions to draft technical advice, reports, memoranda and other deliverables relevant to tax laws and rules Remains current on recent developments and changes relating to area of tax specialization

Delivery Excellence	Recognizes the key capabilities required to deliver a high quality service experience to the client	<ul style="list-style-type: none"> • Delivers client service according to relevant Deloitte standards, policies, and ethical principles • Understands the general components of and tracks progress against a work plan, assuming responsibility for assigned work and reviews for accuracy and quality • Develops an understanding of quality processes and risk procedures as they relate to the scope of the engagement • Understands Deloitte's Tax and Legal services and products • Supports business development efforts by gathering data, research, or proposal development • Takes initiative to identify potential solutions to issues and communicates these effectively to supervisor and/or manager by proactively raising issues in a timely manner
Analytical Thinking and Problem Solving	Collects, assimilates, and analyzes data and uses standard processes and tools to help surface and support solutions in the Tax and Legal business	<ul style="list-style-type: none"> • Leads data gathering and assimilation to formulate a hypothesis and conducts an objective root cause analysis using a structured problem solving approach • Develops analytical models that can be interpreted convincingly and reinforce recommendations • Develops and validates solutions by combining insights from personal experiences and Deloitte Subject Matter Experts (SMEs) with standard methods and tools • Proactively shares knowledge, ideas, and information with others • Contributes ideas to develop solutions, consulting with others as appropriate
Technology Tools and Solutions	Applies technology acumen to address client business challenges	<ul style="list-style-type: none"> • Is familiar with Tax and Legal's technology offerings, frameworks and methods routinely integrated within Service Line domain • Identifies technology components of business objectives and operations • Applies knowledge of technologies to strengthen client recommendations • Stays current on technology trends and understands how Deloitte's services and capabilities can address common client challenges

Service Line Technical capabilities

Below are the Service Line Technical capabilities for Deloitte Private Junior Staff:

Capability	Description	Behavioral anchors
Acquisition and Application of Deloitte Private Technical Knowledge	Provides advice to clients on the topics of local/country-specific individual and corporate tax laws, regulations, and filing requirements	<ul style="list-style-type: none"> • International Tax: Knows where to access and analyze basic provisions of the international double tax treaties, tax commentaries, and related documentation • Estate Planning: Gives recommendations based on client's estate planning goals and objectives; documents client's estate (i.e., assets and beneficiary designations) • Immigration Regimes: Uses experts in immigration to help provide advice utilizing basic knowledge with relevant immigration laws and rules and their tax implications and understands motivation in client's immigration requirements • Family Wealth & Succession Planning: Applies basic knowledge of family wealth regulatory environment, successions and transmission of assets, and trusts and foundations regulatory environment • Industry and Markets: Develops broad understanding of the general industry and markets context while keeping abreast of new developments
Compliance	Assists clients with tax filing requirements and tax deadlines in conjunction with corporate and individual compliance processes	<ul style="list-style-type: none"> • Prepares simple tax returns by using required technology • Identifies and distinguishes between different special tax regimes that may impact compliance work • Prepares a well referenced working file in connection with compliance works • Prepares client recommendations on compensation or other corporate planning
Application of Available Technology and Methodology	Promotes efficiency and enhances client service delivery by adapting Deloitte Private tools to fit the client need	<ul style="list-style-type: none"> • Is proficient with Microsoft Office (Outlook, Word, Excel, and PowerPoint) including Deloitte Private specific and Deloitte global templates • Uses collaboration sites (e.g. e-Rooms) for Deloitte Private engagements • Utilizes social media proficiently and is aware of associated Deloitte policies/risks to present clear and logical findings

Relationship Management	Builds client relationships by conducting research on the client, understanding the clients goals and needs, and communicating regularly with the client	<ul style="list-style-type: none"> • Researches scope and technical specifications of client business or personal interest and determines which activities or operations could trigger Deloitte Private related work • Links potential risks to disclosure of client's sensitive data and information • Participates in interviews by taking comprehensive notes, asking questions, and following up with team members • Prepares summary of meeting with clients and identifies next steps • Enters new contracting relationship with a client by using basic understanding of sales aspects • Participates in the drafting of proposals and scope of services offered to a new client
Effective Management of Deloitte Private Engagements	Performs basic tax planning advice to high net worth clients under supervision	<ul style="list-style-type: none"> • Performs tax analysis and research for both standard and complex issues • Prepares technical memorandum, report, or letters to client on standard issues • Ensures client deliverables incorporate quality standards such as consistent branding, appropriate use of business verbiage, accuracy and clarity of calculations in technical explanations • Understands basic tax and governance considerations relating to the setup and maintenance of a family office • Participates in drafting reports for tax authorities within client's audit process (includes analysis, review, and follow-up)