

RECRUITMENT: TAX MARKET INSIGHT

Maitland Kabir's Guides: Making the Move from Tax Director to Partner: What to Expect from the Interview Process

Navigating the commercial shift from managing delivery to demonstrating business ownership during mid-market partnership interviews.

AT A GLANCE

Interviewing for a tax partnership requires a fundamental shift from showcasing technical capability to proving a robust commercial business case. Candidates must demonstrate market growth potential, client portability, and an ability to collaborate across broader service lines. Tax Directors looking to make this transition must shift their mindset to think and communicate like business owners throughout the multi-stage interview process.

For many Tax Directors, the move to Partner is the logical next step. But the interview process at a mid-market accountancy firm often feels very different from anything you've experienced before. At this level, firms aren't simply checking whether you're technically capable. They're assessing the *commercial case* for bringing you into the partnership, the value you'll add, the opportunities you'll unlock, and how you'll fit into the wider leadership team.

As a result, the conversation shifts from "Can you do the work?" to "What will you bring to the firm?" And while every firm runs its process slightly differently, most Partner interviews follow a familiar pattern.

1. The initial conversation: why Partner, and why now?

The first meeting is usually informal - perhaps with the Head of Tax, a senior Partner or the leader of the relevant service line. It may feel like an introductory chat, but it sets the tone for everything that follows.

Expect questions such as:

- Why you want to make Partner now
- Why you're considering leaving your current firm
- Why this particular firm appeals
- Where you see market opportunity
- What your network looks like
- The type and scale of work you originate or influence
- How you would complement the existing partnership

For Directors moving externally to achieve Partner, one question often sits quietly behind the discussion:

“Why should we back you for Partner when your current firm hasn’t yet done so?”

You need to answer that confidently and positively without criticising your current firm.

2. Building the commercial case

If both sides want to continue, the process becomes more detailed. A mid-market firm considering a new Tax Partner wants to understand the commercial opportunity you represent.

This is where Directors sometimes lean too heavily on technical credentials. By this stage, your technical capability is largely assumed. The focus shifts to:

- **Your market:** Where you see growth and which sectors or specialisms offer the best opportunity
- **Your network:** Who knows you, where referrals come from, and which relationships are genuinely yours
- **Your track record:** What you’ve originated, converted, or expanded
- **Your proposition:** Why clients buy from you and why they would buy from this firm
- **Your numbers:** What you could realistically build over years one, two and three

The word *realistically* matters. A well-supported plan is far more convincing than a large revenue number with little explanation behind it.

3. The business plan

Most Partner processes involve a business plan or presentation. For first-time Partners, this can feel daunting, but it isn’t a test of who can produce the slickest slide deck. The firm is really asking:

“Do you think like an owner?”

A strong Partner business plan typically covers:

- Your proposition and positioning
- Target clients and sectors
- The size of the addressable opportunity
- Existing relationships and routes to market
- Cross-selling opportunities
- Your first 12 months
- A two-to-three-year revenue plan
- Resource or team requirements
- Risks to the plan
- How you will measure progress

Be ready for challenge. If you say you can generate £500,000 of new fees, expect questions about where those fees come from, how many clients that requires, average fee size, sales cycle length, and how much comes from your existing network versus internal introductions.

You don't need certainty, but you do need logic.

4. Meeting the wider partnership

Unlike a Director appointment, becoming a Partner often requires support from a broader group of stakeholders. You may meet several Partners across tax and other service lines.

These conversations aren't just about assessing you. They're about understanding how you would operate *within* the partnership.

A strong Partner isn't someone who simply builds their own book of business. Firms want Partners who:

- Create opportunities for colleagues
- Collaborate across service lines
- Develop people
- Contribute to the wider business

This is especially important in the mid-market, where cross-referrals across Audit, Corporate Finance, Private Client, VAT, Employment Tax and other areas can be a significant part of your value.

Go into these meetings thinking beyond "What can I build?"

Think: **"What can we build together?"**

5. Understanding your portable business

Client portability is one of the most sensitive parts of an external Partner process. Candidates sometimes feel they need to present a definitive list of clients who will follow them. In reality, portability is rarely that simple.

There are contractual, relationship and practical considerations. No candidate should make promises they cannot substantiate.

Instead, discuss your relationships with care:

- Which relationships you personally developed
- Where you are the trusted adviser
- Which clients might have a genuine reason to work with you in future
- Which relationships clearly belong to your current firm

Credibility matters more than bravado. Firms place greater confidence in Directors who understand the nuances of their network than those who claim an entire portfolio will simply move with them.

6. The questions Directors should be asking

A Partner process is a two-way diligence exercise. You're making a significant career decision, so use the process to understand what becoming a Partner at that firm really means.

Ask about:

- Remuneration for new Partners
- Equity vs salaried structures
- Route to equity
- Capital contribution requirements
- How Partner performance is assessed
- Business development expectations
- How work is allocated and shared
- Investment in new propositions
- Marketing and BD support
- Recruitment and team-building support
- How cross-referrals work
- Decision-making within the partnership
- What success looks like after 12, 24 and 36 months

A particularly useful question:

“What have externally hired Partners who performed well here done differently?”

The answer tells you a great deal about the firm's culture and what it truly rewards.

7. Final negotiations and due diligence

Once both sides are comfortable with the commercial case, discussions move to practicalities: remuneration, bonus or profit share, equity, capital requirements, notice periods, restrictive covenants and start date.

This is also the moment to ensure you fully understand what you are joining. Partnership structures vary widely. The headline package is only one part of the picture.

Understand:

- How earnings develop
- How decisions are made
- What financial commitment is required
- What expectations will be placed on you as an owner

Take independent legal, tax or financial advice where appropriate.

The biggest shift: think like a Partner before you are one

The biggest change for a Director going through a Partner process is mindset. A strong Director can talk confidently about technical delivery, clients, teams and personal performance.

A prospective Partner must go further.

They need to show they can:

- Create revenue
- Build relationships
- Develop people
- Collaborate with other Partners
- Make decisions in the interests of the wider firm

You don't need every answer at the first meeting. But by the end of the process, the partnership should be able to see a credible picture of the business you could build with them and you should have an equally clear picture of whether it's the right partnership in which to build it.

ABOUT MAITLAND KABIR

Maitland Kabir is a UK search firm focused on senior appointments across the UK tax profession. Founded on a long-standing partnership and deep sector experience, the firm works directly with clients and candidates on senior, often discreet, searches across the tax market.

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