

James Jobson

Bachelor of Laws
Bachelor of Commerce (Accounting)
Solicitor of the NSW Supreme Court
Chartered Tax Advisor
Tax Agent
Chartered Accountant



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Areas of expertise

Financial services
Mergers and acquisitions
Corporate tax advisory
Corporate and transaction structuring
Tax function management
Tax risk management
Tax risk management & governance frameworks
Tax audit and dispute management & resolution

Previous engagements

UBS AG
KPMG

Overview

James' clients benefit from his knowledge and experience of both in-house and private tax practice bringing together the commercial sensibility of an in-house tax director with the tax technical capability of top tier tax adviser.

Clients appreciate his hands-on approach and ability to distil complex areas of tax law in a manner specific to the individual client and their role in their organisation. Most importantly, clients value James' understanding of the role of tax in the broader commercial scheme of businesses.

James has a background in financial services, but now acts for, and advises, a broad range of clients from rapidly growing companies to multinationals including, Airsight, Arab Bank, Bank of America Merrill Lynch, Coffey, Industrial and Commercial Bank of China, Omniveta Finance, Primary Health Care, Royal Wolf, Toyota Finance and TransGrid.

Recent Experience

James' recent experience includes:

- acting for Bank of America Merrill Lynch as their Head of Tax, Australia/New Zealand on a virtual basis during the 3 month transition to a new head of Tax;
- advising Coffey on the acquisition and tax consolidation implications of acquiring Eco Logical and Proteus;
- advising Airsight on their integration with a US entity and subsequent domestic and international restructure;
- development, drafting and implementation of a tax risk management and governance framework at various corporates, including TransGrid, Toyota Finance and Royal Wolf;
- acting for Primary Health Care as their Head of Tax during the 3 month transition to a new head of Tax;
- advising Omniveta Finance on their Australian and international group structure, including the establishment of an Australian financing branch;
- review of various PDS documents for products issuers in Australia; and
- assistance to various corporates in relation to tax accounting and tax compliance calculations.

James is also currently the Managing Director of Portoria.

Prior to founding Portoria, James spent 9 years at KPMG and later moved in-house at UBS, where most recently he was Head of Tax Advisory (Asia Pacific). There he provided advice to UBS's investment bank, wealth management and global asset management operations across Asia Pacific.

He was a member of UBS's Global Tax Management Committee and Global Tax Sensitive Transactions Committee.

