Position: Tax Specialist (Permanent / Full-time)

Summary:

The primary responsibility for this Tax Specialist, is to provide technical support on tax matters related to the MD group of companies. This includes ensuring compliance with all statutory taxation requirements, perform tax research on various matters, answer questions from the MD regional offices and monitor tax changes for impact to the MD group.

Duties & Responsibilities:

Tax Reporting:

- Act as a subject matter expert supporting MD Private Trust. This may include:
    - Reviewing all governing documents for an estate and trust and opining on tax planning opportunities or tax treatment of particular transactions.
    - preparing/reviewing date of death and related elective tax returns (both federal and Quebec as applicable).
    - Preparing/reviewing testamentary or inter vivos T3 Estate and Trust income tax returns (both federal and Quebec as applicable).
    - Review Notices of Assessment and Reassessment and action errors or omissions.
    - Communicate as necessary with CRA and Revenue Quebec to ensure the returns are assessed/reassessed correctly; prepare correspondence or adjustment requests as required to correct CRA/MRQ filing positions.
- Participate as required on other tax projects, compliance or initiatives within the MD tax group as required. This may include supporting other AVPs and tax managers on matters related to the MD family of mutual funds, Common Reporting Standards ("CRS"), physician incorporation tax strategy, corporate tax return provisions or preparation of T2 Corporate Income Tax returns, philanthropic tax planning and other initiatives as they arise.
- Provide general support and act as subject matter expert to our internal clients on tax matters (develop tools, training, technical tax support).
- Identify risk and process improvements to ensure that duties of the position are carried out correctly and efficiently.

The preferred candidate will exhibit the following attributes:

- Strong client service orientation and present clear and well-defined solutions as well as an ability to build partnerships and effective working relationships with key Taxation Services clients.

- Demonstrate excellent interpersonal skills, initiative and some leadership abilities; is also a proven team player.
- Adapts well to change and can pivot quickly when required
- Ability to communicate with clarity; strong verbal and written communications skills, including effective listening skills.
- Excellent analytical and research skills.
- Self-motivated; committed to achieving results and able to handle a large number of complex deliverables to meet statutory deadlines.

Education & Experience:

KNOWLEDGE:

Demonstrated knowledge of deceased and estate & trust tax return preparation as well as some ability to recognize related tax matters would be an asset.

General knowledge of personal, corporate and trust taxation and accounting is required. Previous experience preferred in the financial services industry, with a national trust company or accounting firm and familiarity with securities legislation would be an asset. Experience providing tax planning to clients would be an asset.

A Specialist in Taxation Services must have a professional accounting designation (CPA - CA, CMA or CGA) or equivalent experience. Completed, currently enrolled in, or a willingness to participate in, the CPA In Depth Tax Course (formerly the Canadian Institute of Chartered Accountants (CICA) In-depth Tax Course) is required.

EXPERIENCE:

2-5 years in personal, corporate or trust taxation is required.

Experience with various computer software applications, in particular Excel, Word, Tax Prep (or similar tax return software) and online research tools is required.

Bilingalism is a strong asset.

How to apply:
Please apply on-line:
https://recruiting.ultipro.ca/MDF5000MDFM/JobBoard/c968dcef-faff-4e28-ac8a-607417aa9e7a/OpportunityDetail?opportunityId=3cbe78fb-ee9c-4624-9dd0-b21a51a95aa3