**Manulife Financial**

**Sr. Tax, Retirement & Estate Planning Consultant**

Waterloo, Ontario

Ontario – Full Time Remote

***Are you looking for unlimited opportunities to develop and succeed? With work that challenges and makes a difference, within a flexible and supportive environment, we can help our customers achieve their dreams and aspirations.***

**Job Description**

Manulife Financial currently has an opening in the Head Office Tax, Retirement & Estate Planning Services team for a Tax, Retirement & Estate Planning Consultant. If you have a professional accounting designation with in depth tax expertise and are looking for an exciting, non-traditional role, this position could be very rewarding.

The Tax, Retirement & Estate Planning Consultant provides technical reference material and education as well as case-specific consulting support to insurance advisors, Manulife field management and Regional Tax, Retirement and Estate Planning group members (RTREPS) with respect to tax, product, concept, legal and accounting issues in complex estate, tax and business planning situations.

**Responsibilities**

- Providing accurate and timely technical information to insurance advisors, field management and RTREPS with respect to tax and regulatory matters
- Developing, implementing and supporting marketing concepts (numerical models demonstrating the use of insurance in particular contexts), strategies and programs for upscale individual and business markets
- Assisting in the designing of software used to illustrate marketing concepts and in the unique products targeted to specific advanced market Designing and building custom concept illustrations in Excel for insurance advisors, field management and RTREPS in complex estate, tax and business planning situations
- Building and delivering presentations for professional and non-professional audiences
- Special Conditions: Some travel required. Incumbent will be required to remain current on relevant tax and regulatory matters.

**Qualifications**

- CA (or other professional accounting designation) with strong background in tax with experience in personal, small business and estate planning
- Computer software knowledge (spreadsheets and word processing)
- Completion of CICA In-Depth Tax Course
- Strong oral and written communication and presentation skills
- Excellent organizational and prioritization skills

- Strong analytical skills
- Ability to meet tight deadlines
- Strong interpersonal skills; must have the ability to interpret and communicate technical information to a non-technical audience
- Accuracy and attention to detail
- Team player

**Helpful**

- Previous experience in the Life Insurance or Financial Services Industry
- Project management skills
- Expertise in the taxation of Life Insurance Products
- Familiarity in Microsoft Office (EXCEL, Word, PowerPoint)

**Please Note: * This position would be of interest to Tax Managers and Senior Tax Managers.**

***If you are ready to unleash your potential it's time to start your career with Manulife/John Hancock.***

**About Manulife**

Manulife Financial Corporation is a leading international financial services group that helps people make their decisions easier and lives better. We operate primarily as John Hancock in the United States and Manulife elsewhere. We provide financial advice, insurance, as well as wealth and asset management solutions for individuals, groups and institutions. At the end of 2017, we had about 35,000 employees, 73,000 agents, and thousands of distribution partners, serving more than 26 million customers. As of September 30, 2018, we had over $1.1 trillion (US$863 billion) in assets under management and administration, and in the previous 12 months we made $27.6 billion in payments to our customers.

Our principal operations are in Asia, Canada and the United States where we have served customers for more than 100 years. With our global headquarters in Toronto, Canada, we trade as 'MFC' on the Toronto, New York, and the Philippine stock exchanges and under '945' in Hong Kong.

Manulife is committed to supporting a culture of diversity and accessibility across the organization. It is our priority to remove barriers to provide equal access to employment. A Human Resources representative will consult with applicants contacted to participate at any stage of the recruitment process who request an accommodation. Information received regarding the accommodation needs of applicants will be addressed confidentially.

**APPLY ONLINE:** To apply for this position, please copy and paste the URL below into new web browser to be directed to our online application system.

https://manulife.wd3.myworkdayjobs.com/MFCJH_Jobs/job/Waterloo-Ontario/Sr-Tax--Retirement---Estate-Planning-Consultant_JobReq0369930-1