PPI

PPI is a leading marketer of insurance solutions. We offer actuarial, tax and specialized expertise in all aspects of life insurance, and specifically in its design and custom application. Earning our partners' trust is at the heart of everything we do.

Planning Services Consultant

To maintain PPI's exacting level of service, we are looking for an experienced professional with in-depth tax and estate planning knowledge to join our PPI Planning Services team. The team is comprised of accountants, lawyers and actuaries who consult with life insurance advisors, their clients and their clients' tax and legal professionals. As an integral part of the PPI value proposition, you will provide insight into income tax, estate and business planning as it relates to life insurance opportunities with business owners, professionals and high net worth clients.

What You Will Do

- Prepare comprehensive and technical tax and estate planning reports for insurance advisors and their clients
- Prepare memos relating to specific tax and estate planning questions raised by insurance advisors and their clients
- Respond to tax and estate planning inquiries from insurance advisors and corporate personnel
- Communicate with professional advisors to discuss issues and recommendations
- Prepare research and client newsletter articles on tax and estate planning topics
- Make presentations on relevant topics to life insurance advisors, and life insurance industry and professional groups
- Train and educate staff and advisors on tax and estate planning matters
- Maintain complete confidentiality relating to all client matters
- Maintain professional standards and designations through continuing education and professional development

Desired skills and experience

- Chartered professional accountant or lawyer
- A minimum of 7-10 years of income tax experience (including owner manager and estate planning and completion of the CICA In Depth Income Tax course)
- An additional designation of TEP, CFP, and/or CLU is an asset
- A strong working knowledge of tax and estate planning for high net worth individuals and business owners
- A strong working knowledge of the taxation of trusts, estates and private corporations
- Demonstrated marketing and entrepreneurial instincts
- Possess good communication skills and strong presentation skills

If you possess these skills and experience and are looking to join a dedicated and dynamic Planning Services Team, please submit your resume to cireland@ppi.ca.

This position is located in Toronto, Ontario.

PPI is committed to providing a safe, welcoming, barrier-free accessible workplace. We welcome and encourage all qualified applicants and will accommodate candidates with disabilities in all aspects of the recruitment and selection process.

We thank all candidates for applying, however only those selected for an interview will be contacted. Your resume may be used for other vacancies.