JOB TITLE: SENIOR TAX MANAGER

Department Overview:

TD Wealth Private Wealth Management provides the highest level of tailored advice and integrated wealth management solutions. Our goal is to help our clients and their families develop integrated, comprehensive and customized financial solutions. At all times, our exceptional team of banking, estate planning, trust and investment professionals work together with our wealth partners to help our clients create wealth, preserve and protect it, and pass it on to the generations that follow.

Tax Services is a department within TD Wealth Private Trust, a key business unit within Private Wealth Management (PWM), which provides tax return preparation and planning for estates and trusts; high net worth individuals and their families. Tax Services also provides accounting and corporate tax services for clients with investment holding companies.

Job Description:

The Senior Tax Manager reports directly to the National Leader, Tax Services. He or she has responsibility for the strategic development of Private Business Interests (PBI) within PWM and managing the tax return preparation process for these products Tax Services Centre of Expertise. The Senior Tax Manager will be the primary technical “lead”, for the Tax Services office and our TD Wealth partners for the Corporate Tax Services.

The Senior Tax Manager, Private Business Interests (PBI's) has responsibility for managing the various risks associated with the corporations held by PT in estates or trusts, determining the most advantageous future direction of the companies involved and provides day-to-day operational oversight of a Tax Manager's and/or Senior Tax Analysts supporting their initiatives. The ideal individual in this role is a tax lawyer and/or CPA with a decade of public accounting and tax experience advising owner-managed companies on both corporate and estate-planning matters.

Specific accountabilities include:

- Managing the risks associated with private businesses held in estates and trusts;
- Analyzing estate/trust-held private business financial results, and developing and implementing strategic plans;
- Providing day-to-day operational oversight, review and filing of personal, trust, estate and corporate income tax returns, in a timely and accurate manner, including any tax files that have PBI's;
- Reviewing corporate financial statements, accounting entries and corporate tax returns prepared by internal tax analysts and/or external parties;
- Handling the day-to-day administration and management of private businesses and holding companies in accordance with TDBFG policies;
- Attend shareholders and directors' meetings;
- Reviewing corporate minutes, dividend payment analysis and providing recommendations;
- Analyzing pros and cons of winding company up compared to distributing shares or property to beneficiaries, including understanding of pipeline and hybrid scenarios;
- Preparing wind-up analysis and executing the same with external professionals;
- Identifying need for business valuations and reviewing valuations prepared by external firms;
- Working with external lawyers and accountants on tax compliance matters, corporate reorganizations, wind-ups and liquidations, incorporations, estate freezes, "purifications", and the valuation and sale of private business interests, and business succession planning for corporations held in trust;
- Overseeing the sales and onboarding process of all new tax clients with a PBI, to ensure a legendary client experience;
- Providing second-level review of more complicated personal, trust, estate returns and externally prepared returns involving PBI's;

- Signing off on tax risk analysis on estate distributions and/or PBI's;
- Providing lead technical support to, and conducting training sessions for, Tax Services office staff and PT and Wealth partners;
- Supporting the "deal team" process and attending meetings as requested;
- Staying abreast of tax developments;
- Conducting detailed research on complicated tax matters;
- Reviewing appeal/non-appeal recommendations and making the decisions as to how best to move forward and reviewing Notices of Objection;
- Conducting initial client meetings and maintaining oversight of day-to-day client contact on tax compliance and planning matters by Tax Managers;
- Conducting acceptance testing of new releases of TaxPrep Forms, T3, T1, and T2 programs;
- Tax planning on complicated client files;
- Maintaining a good working relationship with the PT branches and providing the initial level of issue resolution on technical matters;
- Interact with the CRA and provincial tax authorities on tax compliance matters;
- Assisting the National Leader with external (client, prospective client, and professional or industry association) presentations and special projects, as required;
- People management of Tax Managers and Senior Tax Analysts, as assigned.
- Managing the Tax Services office in the absence of the National Leader, Tax Services.

Education/Accreditations:

- 10+ years accounting firm or trust company, work related experience;
- Law Degree and/or Accounting designation (CPA-CA);
- Trust and Estate Practitioner ("TEP"); and
- CICA In-Depth Tax course or equivalent.

Other Qualifications/Skills/Experience:

- Strong technical skills;
- Thorough understanding of corporate, estate and trust, personal and related tax compliance
- requirements;
- Thorough understanding of trust law and practice;
- Effective time management and organizational skills;
- A general understanding of cross-border US income and estate tax matters would be an asset;
- A demonstrated ability to make presentations to both internal and external audiences and write
- articles on technical matters;
- Prior senior management experience in a national CPA firm or Trust Company environment.

French Fluency highly preferred!
To Apply: https://jobs.td.com/en-CA/jobs/14041784/senior-tax-manager-vancouver-ca/