

Tax & Estate Planning Manager

Scope Statement

The Tax & Estate Planning Manager is accountable for developing and providing advanced sales and marketing support for the various distribution channels of the Company. This person will report to the Director, Tax, Retirement & Estate Planning. . The incumbent will provide a broad amount of advanced technical information to staff, advisors and CHO regarding tax & estate planning issues, including advanced case consultation support.

Impact Statement

- Supports Distribution partners (internal staff and external advisors) with technical and advanced marketing support and case consultation support, both verbal and written aimed at attracting and retaining life, health and investment business.
- Helps to build and support the Company brand, presence and marketing initiatives via formal presentations and workshops, coordinated with Distribution.
- Prepare, refine and deliver presentations and technical written material in consort with the Director, Tax, Retirement & Estate Planning.

Responsibilities

- Responsibilities include professional development support for Distribution partners and ensuring account executives and inside sales support remain current and proficient in product application and technical knowledge
- Provides department and divisional management with assessments of developing trends and noteworthy issues in the insurance and investment market, including product applications, product design, pricing, target market initiatives
- Completes other projects and initiatives as assigned from time to time

Knowledge / Experience / Certification

- 5- 8 years advanced marketing experience with a focus on tax and estate planning in the financial services sector.
- Experience in research and analysis
- Demonstrated ability to learn technical applications
- Must be bilingual (English, French)

Education / Professional Courses

- Completion of a university degree with courses in business, analysis, marketing
- CA,CGA or LLB,JD, or with combination of CFP,CLU/AVA,CHFC, TEP definite assets

Key Skills

- Well-developed written and verbal communication skills and presentation skills
- Well-developed organizational skills
- Well-developed analytical skills
- Ability to conduct research, investigate and analyze
- Ability to work independently and as a team member
- Computer literacy
- Problem solving
- Relationship building skills
- Creativity
- Innovation
- Ability to prioritize and balance multiple tasks or projects

Key Competencies

- **Business Knowledge:** Demonstrates industry and competitor awareness of advanced marketing strategies and a strong understanding of applied tax & estate planning, including the effective use of insurance related products (life, health and investment)
- **Analysis and Problem Solving:** Where necessary, gathers information and applies a variety of analytical techniques to generate actionable comparisons and possible alternatives and solutions
- **Relationship Building:** Initiates and builds effective relationships with colleagues distribution partners/advisors, in different locations

Working Conditions

- Prolonged periods of concentration and attention to detail
- Frequent interruptions (at times)
- Ability to work from home
- Travel, mostly in Quebec, occasionally to other provinces (mainly Ontario)
- May be required to work extended hours

Interactions

- Employees and management on a local and national basis, particularly Distribution
- Key financial advisors and distribution partner groups identified by Account Executives
- Industry associations/organizations and government agencies
- Insurance and Investment network of accredited professionals

Please email applications to:

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