Director, Tax & Estate Planning

Location: Open to candidates in the Atlantic provinces, Ontario, and Western Canada

IGM Financial Inc. is one of Canada's leading diversified wealth and asset management companies with approximately $271 billion in total assets under managements. The company provides a broad range of financial planning and investment management services to help more than two million Canadians meet their financial goals. Its activities are carried out principally through IG Wealth Management, Mackenzie Investments and Investment Planning Counsel.

Under IGM Financial's unique business model based on leading brands and multi-channel distribution strategy, we're IG Wealth Management. For over 90 years of business we have grown to become one of the largest most respected companies in Canada. We are a leader in providing the best advice, experience and outcomes for our clients, personalized throughout their lifetime. **We are proud to be recognized among Canada's Top 100 Employers (2022) by Mediacorp Canada Inc. in the national ranking for our focus on supporting employees with a number of initiatives that promote personal wellness with a focus on four key pillars including physical, mental, social and financial health.** This is your opportunity to build a career with a leading organization where you can learn, grow and thrive both professionally and personally.

At IG Wealth Management, our vision is to inspire financial confidence. You will join a team that that believes our success starts with the success of our clients, while working together as a team to realize our greatest potential. You will join a team that strives towards excellence while developing and sharing skills and knowledge. You can make a difference for our clients, the world around us and be part of a team that cares. We are dedicated to offering a **hybrid work environment** when applicable.

IG Wealth Management is a diverse workplace committed to doing business inclusively - this starts with having a representative workforce! We encourage applications from all qualified candidates that represent the diversity present across Canada – including racialized persons, women, Indigenous persons, persons with disabilities, 2SLGBTQIA+ community, gender diverse and neurodiverse individuals, as well as all who may contribute to the further diversification of ideas.

The Advanced Financial Planning department is a growing team of 38 accounting, legal and financial planning professionals responsible for providing financial planning support, training and resource material to IG Consultants. The support provided includes taxation, estate planning and insurance support, and financial planning software support on complex cases. Members of the department also provide support to high-net-worth clients, particularly those with complex needs, by meeting with them (either remotely or in person) to discuss tax and estate planning strategies and liaising with the client's external professionals to co-ordinate the planning where necessary.

We are currently looking for 3 tax professionals to join our Advanced Financial Planning team. We are open to considering candidates located in Ontario, the Atlantic provinces and Western Canada, as the job can be conducted remotely, although there will be an expectation of occasional travel to meet with the team in person and to meet with high-net-worth clients in person.

The successful candidate will be expected to:

- Provide advanced estate planning, taxation and other financial planning support for IG Consultants by responding to their questions or issues received by telephone and e-mail.
- Prepare written reports (based on detailed analysis) for complex client situations, advising on tax, estate and other financial planning opportunities, strategies and issues.
- Create and analyze financial plans for complex client situations, particularly those involving business owners and private corporations.
- Participate in meetings or conference calls with clients and/or their professional advisors on matters relating to estate planning and tax.
- Develop and provide advice and training to other IG Wealth Management departments on advanced taxation, estate planning and other financial planning issues (which may include the review of corporate materials, advertisements, client collateral relating to financial planning, participating on editorial committees for production of client publications, advising on new product development and on the appropriateness of various financial planning solutions).
- Represent IG Wealth Management's financial planning approach to the media, public audiences, and professional organizations.
- Complete the Certified Financial Planner ("CFP") designation with FP Canada if not already obtained.

Qualifications:

- Post-secondary university degree plus attainment of a professional legal or accounting designation.
- Minimum 7 years experience in advanced estate planning and taxation, with a preference for completion of additional industry related education (examples could include the Trust and Estate Practitioner designation awarded by the Society of Trust and Estate Practitioners or the CPA Canada in-depth tax course) and experience in delivering advice to owner/managed businesses and/or high net worth individuals.
- A continuous learner who stays on top of business trends and tax technical changes.
- Flexible, able to work with light supervision and adapt to change.
- Strong verbal and written communication skills.
- Strong public speaking and training skills.
- Proficiency with Windows environment PC based tools.

Please apply **here** by **May 21, 2022.**

IG Wealth Management is an accessible employer committed to providing a barrier free recruitment experience. If you require an accommodation or this information in an alternate format at any stage of the recruitment process, please reach out to the Talent Acquisition team who will work with you to meet your needs.