

Director, Tax Services & Special Products

We're on a mission to build the relationship-focused bank of the future and we're looking for the passionate collaborators, innovators, advisors, and leaders who can get us there. Our distinct culture is built on a shared commitment to do what's right for our clients, our people, and our communities, and we strive for excellence in everything we do. Because life at CIBC is not only what you do, but how you do it.

To learn more about CIBC, please visit [CIBC.com](https://www.cibc.com)

What You'll Be Doing

Reporting to the Executive Director, CIBC Trust, the Director, Tax Services provides tactical guidance and specialized estate and trust income tax knowledge to staff, clients and CIBC Partners, as well as provides oversight to a team of Tax Officers. Also, personally oversees the larger, more complex accounts including estates that have corporations. This role fosters a proactive client service environment while building and maintaining strong relationships with both internal partners and external consultants. The incumbent also provides additional oversight for special products and QI/FATCA/CRS. As a member of the CIBC Trust Leadership Team, the incumbent contributes to establishing and achieving the strategic objectives of CIBC Trust, and takes ownership of key initiatives to improve the business.

How You'll Succeed

- **People Management** – Provide leadership and effective management of business unit staff to influence employee commitment to the organization, to the team, and to their job by: Setting appropriate context when assigning work to ensure that individuals' roles support the achievement of the business unit's priorities and CIBC's overall goals; Building team and individual capabilities by providing development opportunities such as job shadowing, special projects, and training; Managing performance by providing fair and accurate formal and informal feedback, identifying and removing obstacles to performance and by explaining how performance expectations align with business priorities; Creating a positive work environment and being an effective role model by championing CIBC's mission, vision and values; Ensuring compliance with policies, standards, guidelines and controls by applying the policies and controls fairly and consistently so employees understand what to expect, and; Hiring the right people in the right jobs to align individual capabilities with job requirements and business unit goals.
- **Tax Acumen** – Provide oversight over the timely, accurate and effective completion of all tax filings including those for complex estate, trust and power of attorney accounts as well as other special trusts. Maintain up-to-date knowledge and understanding of estate, trust and power of attorney tax legislation. Identify and mitigates tax risks while adhering to all CIBC Trust Policies & Procedures, including post mortem tax planning.
- **Collaboration** – Partner effectively with internal experts from the Trust and Estate, Investment Management, and Property Management departments to provide oversight any tax issues. Engages external professionals as required.
- **Operational Support** – Act as a technical expert in the creation of new tax policies, procedures, and documents. Assists in developing standards in administration, and vetting new policies and procedures. Oversight over any special projects relating to CIBC Trust including, but not limited to global tax compliance projects, commodity tax changes, any compliance/audit projects imposed either internally or externally, etc.

Who You Are

- **You have** a post-secondary education in business and commerce including a recognized accounting designation (CA/CMA/CGA/CPA)
- **You have your** CICA In-depth Tax Course – completion of both Level I and II
- **You can demonstrate experience in.** Well-developed knowledge of Trust industry income tax practices sufficient to apply and adapt them efficiently and effectively to the area.
- **You have** a good understanding of tax, estate and business succession planning matters including US/cross-border tax planning issues, estate freezes, corporate reorganizations, wind-ups and liquidations, incorporations, valuation and sale of private and business interests, corporate financial statements and related corporate tax returns.
- Experience with QI/FATCA/CRS would be an asset.
- STEP membership is desirable.
- **Values matter to you.** You bring your real self to work and you live our values - trust, teamwork, and accountability.

What CIBC Offers

At CIBC, our people are our greatest asset. You'll become part of a diverse community that acknowledges everyone's unique talents, and empowers teams to do what's right for the client, and to do it well. As part of our team, you will:

- **Thrive:** Benefit from an open and approachable culture that provides the flexibility and support you need to integrate your life at work and at home
- **Connect:** Work in a place where the right technology and infrastructure fosters innovation, collaboration and creativity
- **Develop:** Grow your skills and career through our best-in-class onboarding experience, ongoing learning opportunities, individual development planning, and comprehensive product training
- **Prosper:** Share in our collective success with a competitive salary, incentive pay, banking benefits, health benefits program, and employee share purchase plan

What You Need to Know

- CIBC is committed to creating an inclusive environment where all team members and clients feel like they belong. We seek applicants with a wide range of abilities and we provide an accessible candidate experience. If you need accommodation during the application or interview process, please contact: Rejni.Mile@cibc.com
- You need to be legally eligible to work in Canada at the location(s) specified above and, where applicable, must have a valid work or study permit.
- This is a regular full time role with a schedule of 37.5 hours each week, you may be required occasionally work outside of business hours.