POSITION: Director, Tax, Retirement, & Estate Planning
LOCATION: Toronto, ON
STATUS: Full Time

JOB OVERVIEW

The Tax, Retirement and Estate Planning (TREP) team at CI Global Asset Management (CI GAM) provides tax, retirement and estate planning support to its Sales team, financial advisors and planners to assist with protecting and growing client wealth. Currently, the team is accepting applications for the position of Director, Tax, Retirement and Estate Planning. Working from Toronto, this position (bilingual) will report to the Vice President and Team Lead, TREP.

The Director will be responsible for supporting advisors and the CI GAM Sales team by responding to detailed tax, retirement and estate planning questions, developing informational/educational content (i.e., articles, brochures and other tools) and ensuring that TREP-related marketing materials consistently reflect changes in applicable legislation. The role will act as a vital resource to our distribution team to further enable the growth of our mutual fund and ETF line-ups through the provision of value-added services. This will include collaboration with wholesaling teams and identifying unique sales opportunities through personal, corporate and trust tax, retirement and estate planning concepts.

WHAT YOU WILL DO

- Work closely with TREP and Sales team members from across the country to develop materials and opportunities that lead to the sale of CI GAM products and services;
- Act as a subject matter expert and, working with financial advisors, identify tax, retirement and estate planning issues and opportunities and appropriate solutions;
- Work with Sales to provide education and information to advisors and investors through calls, emails and other written communication;
- Act as a referral point for Sales when tax, retirement and estate planning strategies uncover opportunities for CI GAM sales;
- Resolve client inquiries originating from seminars and/or published articles;
- Conduct research to assist TREP VPs in preparing for media interviews and advisor/investor presentations;
- Work collaboratively with TREP, Sales and other CI GAM departments as needed to gain and share technical knowledge to meet company objectives;
- Maintain working knowledge of industry competitors, resources and financial markets to develop and assess suitability of various TREP-related materials and strategies.

WHAT YOU WILL BRING

- Excellent communication skills, both written and oral;
- Bilingual in French/English is an asset

- A good understanding of tax and estate laws in Canada and proven application of these rules;
- Knowledge of the Canadian asset management industry is an asset;
- A minimum of 3-5 years of relevant working experience;
- Completion of post-secondary degree, ideally with a business or legal focus (e.g., financial planning, finance, accounting or law);
- A financial planning, accounting or legal designation (e.g., CFP, CPA, CA, LL.B, LL.M, JD, TEP, etc.);
- Strong research, analytical and project management skills;
- Proficiency with various tax and estate planning resources (i.e. Income Tax Act, Canada Revenue Agency (CRA) guides, bulletins and information circulars, accounting and legal databases, etc.) and an ability to interpret and apply concepts to "real life" scenarios;

WORKING CONDITIONS

- Travel on occasion may be required to road shows, conferences, seminars and industry events;
- May be required to work beyond normal working hours from time-to-time;
- Normal office environment, with an in-office requirement of 3 days per week.

ABOUT US

CI Financial is an independent company offering global wealth management and asset management advisory services through diverse financial services firms. Since 1965, we have consistently anticipated and responded to the changing needs of investors. We are driven by a commitment to provide individuals and institutions with the highest-quality investments and advice. Our commitment to the highest levels of performance means that whatever their position, CI employees must be comfortable in a fast-paced environment that will stretch them to tap into their highest potential. Employees with a healthy dose of ambition, a desire to commit to a curious mindset for continuous learning, and a willingness to go the extra mile thrive at CI.

HOW TO APPLY

Please submit a formal application to our Careers site on:

https://ci.wd3.myworkdayjobs.com/CI_FINANCIAL_EXTERNAL_CAREER-SITE/job/Toronto-ON/Director--Tax--Retirement-and-Estate-Planning_JR1437-1

Only qualified candidates selected for an interview will be contacted.

CI Financial Corp. and all of our affiliates ("CI") are committed to fair and accessible employment practices and we are committed to providing accommodations for persons with disabilities. If you require accommodations in order to apply for any job opportunities, or require this posting in an additional format, please contact us at accessible.recruitment@ci.com, or call 416-364-1145 ext. 4747. **If you are contacted by CI** regarding a job opportunity or testing and require accommodation in any stage of the recruitment process, please use the above contact information. We will work with all applicants to determine appropriate accommodation for individual accessibility needs.