VP, Tax, Retirement & Estate Planning – Toronto – CI Financial

At CI, we see a great place to work as one that is a safe place for everyone to have a voice, where people are empowered to take ownership over meaningful work, where there is an opportunity to grow through stretching themselves, where they can work on innovative products and projects, and where employees are supported and engaged in doing so.

CI Advisor Consulting's Tax, Retirement and Estate Planning (TREP) team at CI Global Asset Management (CI GAM) provides tax, retirement and estate planning support to financial advisors across Canada on behalf of our salesforce to assist with protecting and growing client wealth. Currently, the team is accepting applications for the position of Vice President, Tax, Retirement and Estate Planning. Working from Toronto, this position will report to the Vice President, Head, CI Advisor Consulting. This VP will be responsible for supporting advisors and the CI GAM Sales team by responding to detailed tax, retirement and estate planning questions, presenting and creating informational/educational content and ensuring that TREP-related content 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 product 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 Advisor Consulting and sales team members from across the country to build new relationships and strengthen existing ones via value added services that lead to the sale of CI GAM products and services;
- Act as a subject matter expert and educate financial advisors on tax, retirement and estate planning issues and concepts, changes in legislation, and general solutions;
- Work with sales to provide education and information to advisors and investors through presentations, consultations, calls, emails and other written communication;
- Conduct ongoing sales presentations, participate in promotional road shows, conferences and investor seminars;
- Present at CI conferences and related events for financial advisors across multiple distribution channels;

- Develop creative articles to be shared with larger audiences on key initiatives and value added propositions;
- Participate in media opportunities on relevant topics;
- Conduct ongoing research on important industry trends and research;
- Build relationships with sales and conduct training as needed on important industry concepts that would be beneficial to selling CI GAM product;
- 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; and
- Work collaboratively with TREP team members to develop new topics, promotional material, and deliverables.

WHAT YOU WILL BRING

- A minimum of 8 years of professional experience specializing in tax and estate planning;
- Expert level knowledge of private client taxation, retirement planning and/or estate planning required;
- An accounting or legal designation (e.g. CPA, CA, LL.B, LL.M, JD, etc.) is strongly preferred;
- A TEP designation and completion of one of CPA Canada Indepth Tax Program, M. Tax, or LL.M Tax is strongly preferred;
- CFP designation is an asset;
- A good understanding of tax and estate laws in Canada and proven application of concepts in a firm setting is an asset;
- Completion of at least one post-secondary degree with a business or legal focus (e.g., financial planning, finance, accounting or law);
- Excellent communication skills, both written and oral;
- Bilingual in French/English is an asset;
- Knowledge of the Canadian asset management industry is an asset;
- Strong research, analytical and project management skills;
- Proficiency with various tax and estate planning resources (i.e. Income Tax Act, Canada Revenue Agency guides, bulletins and information circulars, accounting and legal databases, etc.) and an ability to interpret and apply concepts in a practical manner;
- Strong presentation and training skills with large and small audiences;

- Ability to convey complex technical material to financial advisors and investors in an effective manner;
- Entrepreneurial nature – able to work with CI GAM sales teams to identify opportunities and trends;
- Strong time management and organizational skills; and
- Ability to work with a remotely-located team.

WORKING CONDITIONS

- Travel required to road shows, conferences, seminars and other industry events up to 30-40% of the time;
- Normal office environment, with an in-office requirement of 4 days per week when not travelling;

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.

A Supportive Environment for Success

We offer an in-office environment, competitive benefits, and a supportive workplace to help our employees thrive both personally and professionally.

WHAT WE OFFER

- Modern HQ location within walking distance from Union Station
- Training Reimbursement
- Paid Professional Designations
- Employee Savings Plan (ESP)
- Corporate Discount Program
- Enhanced group benefits
- Parental Leave Top–up program
- Paid time off for Volunteering

We are focused on building a diverse and inclusive workforce. If you are excited about this role and are not confident you meet all the qualification requirements, we encourage you to apply to investigate the opportunity further.

Please submit your resume in confidence through the link:
https://www.linkedin.com/jobs/view/4188922571

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 provide reasonable accommodations for persons with disabilities. If you require accommodations in order to apply for any job opportunities, require this posting in an additional format, or require accommodation at any stage of the recruitment process please contact us at accessible.recruitment@ci.com, or call 416-364-1145 ext. 4747.