Director, Tax & Estate Planning

Location: Toronto

We're IG Wealth Management – a Canadian leader in providing the best advice, experience and outcomes for our clients, personalized throughout their lifetime. This is your opportunity to build a career with a leading organization where you can learn, grow and thrive both professionally and personally.

Our vision: We inspire financial confidence

At IG Wealth Management we believe:

- Our success starts with the success of our clients
- In achieving excellence in all we do, and anything worth doing is worth doing extraordinarily well
- Only through teamwork can we realize our greatest potential
- We can never be satisfied with the status quo and that every day we should be focused on creating more value
- In the power of advice to change lives for the better
- It is our mission to make a difference in the world and the lives of others

If you share our vision and values, we'd like to hear from you.

The Advanced Financial Planning department is a growing team of 34 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. The department also represents IG Wealth Management and its financial planning expertise to the media, the public and professional organizations through interviews and presentations.

We are currently looking for a Director to join our Advanced Financial Planning team. The successful candidate will be located in the Greater Toronto Area.

The Director is responsible for providing advanced taxation and estate planning advice, assisting with the creation of financial plans in complex situations, client meeting support, training and resource materials to IG Consultants. The position also provides advice to other head office departments and represents IG Wealth Management's financial planning approach to the media, clients, public audiences and professional organizations.

The successful candidate will be expected to:

- Provide advanced taxation and estate planning and other financial planning support for IG Consultants by responding to their questions on taxation, estate planning and other financial planning 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.
- Participate in meetings or conference calls with clients and/or their professional advisors on matters relating to tax and estate planning.
- Initiate, develop and deliver advanced taxation, estate planning and other financial planning training for IG Consultants.
- Develop and update financial planning resource tools for IG Consultants.
- Provide advice and training to other IG Wealth Management departments on advanced taxation, estate planning and other financial planning issues (including 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 and its financial planning expertise to the public and professional organizations through media interviews (under the direction of the Media Relations department), through informational sessions and presentations.
- Complete the Certified Financial Planner ("CFP") designation with FP Canada if not already obtained.

Qualifications:

- Minimum 5 years' experience in advanced taxation and estate planning, with preference for completion of the 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 or high net worth individuals.
- Completion of a post-secondary university degree plus attainment of a professional legal designation.
- 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 visit the following link to apply. Application due by January 20, 2020.

https://career17.sapsf.com/sfcareer/jobreqcareer?jobId=8321&company=investorsgP&username=