PPI

Role: Planning Services Consultant, PPI Planning Services Team
Location: Montreal, Quebec
Reporting to: Senior Vice-President, Planning Services, PPI
Recruiter: Patty O'Neill – poneill@ppi.ca

We are looking for an experienced professional with in-depth tax and estate planning knowledge to join our PPI Planning Services team. The team is comprised of accountants, lawyers and actuaries who consult with life insurance advisors, their clients and their clients' tax and legal professionals. As an integral part of the PPI value proposition, you will provide insight into income tax, estate and business planning as it relates to life insurance opportunities with business owners, professionals and high net worth clients.

What you will do

- Prepare comprehensive and technical tax and estate planning reports for insurance advisors and their clients
- Prepare memos relating to specific tax and estate planning questions raised by insurance advisors and their clients
- Work collaboratively with the Sales, Marketing and Underwriting teams and develop and present custom proposals and insurance solutions for large, complex cases in the high net worth (HNW) and ultra-HNW market
- Respond to tax and estate planning inquiries from insurance advisors and corporate personnel
- Communicate with professional advisors to discuss issues and recommendations
- Prepare research and client newsletter articles on tax and estate planning topics
- Make presentations on relevant topics to life insurance advisors, and life insurance industry and professional groups
- Train and educate staff and advisors on tax and estate planning matters
- Maintain complete confidentiality relating to all client matters
- Maintain professional standards and designations through continuing education and professional development

Desired skills and experience

- Chartered professional accountant or lawyer, specializing in tax with business degree (preferred)
- A minimum of 5 years income tax experience (including owner manager and estate planning and completion of the CICA In Depth Income Tax course)
- An additional designation of TEP, CFP, and CLU is an asset
- A strong working knowledge of tax and estate planning for high net worth individuals and business owners
- A strong working knowledge of the taxation of trusts, estates and private corporations
- Demonstrated marketing and entrepreneurial instincts
- Possess good communication skills and strong presentation skills

About PPI

PPI elevates independent financial advisors to the next level. Supporting advisors with market leading expertise and technology, we empower advisors to build the best solutions for their clients. For more information about PPI, please visit our website at www.ppi.ca.