



With more than 51 years of exclusive service to Canada's physicians and their families, MD's mission is to provide them with financial peace of mind, so they can enjoy what matters most to them while achieving their career and life goals.

MD's commitment to work/life integration, employee well-being and ongoing learning are key factors that drive our overall success. With Scotiabank by our side, we are even better positioned to provide our clients with financial advice and solutions to help them achieve their short- and long-term financial goals.

At MD, we offer a unique culture and, because of that, we have been recognized in several ways: Best Workplace Culture, Achievers 50 Most Engaged Workplaces in North America, the National Capital Region's Top Employer, and Talent Board's North American Candidate Experience Award.

We are always looking for individuals with bright minds and a deep-seated desire to make a difference in the lives of some of the most hard-working, industrious and essential individuals in our community: Canada's physicians.

#### **What You Will Do:**

Reporting to the AVP, Taxation Services, the primary responsibility for the Client Tax Manager is to provide technical support on tax matters related to the MD group of companies, this includes ensuring compliance with all statutory taxation requirements, performing tax research on various matters, answering questions from the regional offices and monitoring tax changes for impact to the group.

The ideal candidate has experience in, or an aptitude or interest in automated tax systems, tax reporting systems and a keen eye for identifying improvements to same.

Specific responsibilities:

- Prepare/review: date of death and related elective tax returns (both federal and Quebec as applicable) for clients of MD Private Trust.
- Prepare/review testamentary or inter vivos T3 Estate and Trust income tax returns (both federal and Quebec as applicable) for clients of MD Private Trust.
- Review Notices of Assessment and Reassessment and action errors or omissions.
- Communicate as necessary with CRA and Revenue Quebec to ensure the returns are assessed/reassessed correctly; prepare correspondence or adjustment requests as required to correct CRA/MRQ filing positions.
- Draft Notices of Objection as required.
- Ensure all tax administration in an estate or trust is in accordance with the terms of the governing documents, relevant provincial and federal legislation and company policy.
- Identify any foreign or corporate tax filings required in an estate or trust.
- Consult with outside accountants and lawyers as it pertains to MD Private Trust client matters.

- Participate on other tax projects, compliance or initiatives within the MD Taxation Services team. This may include supporting other tax AVPs on matters related to the MD family of mutual funds, physician incorporation strategies, corporate tax return provisions or preparation of T2 Corporate Income Tax returns, acting as a subject matter expert reviewing tax content in client facing communications and marketing material.
- Provide support and act as subject matter expert to our client facing advisors and back office staff on tax related matters such as registered plans, complex queries on tax slip reporting, and support for the MD tax reporting systems.
- Develop tools, training, and technical tax support for our client facing advisors.
- Identify risk and process improvements to ensure that duties of the position are carried out correctly and efficiently.

#### **What You Bring:**

- Strong client service orientation, an ability to present clear and well-defined solutions, as well as an ability to build partnerships and effective working relationships with key Taxation Services clients.
- Demonstrates excellent interpersonal skills, initiative and some leadership abilities; is also a proven team player.
- Adapts well to change and can pivot quickly when required.
- Ability to manage a large and varied workload with competing deadlines.
- Ability to communicate with clarity; strong verbal and written communications skills, including effective listening skills.
- Excellent analytical, research skills.
- Self-motivated; committed to achieving results and able to handle a large number of complex deliverables to meet statutory deadlines.

#### **What You Need:**

- Minimum 5 years in personal, corporate or trust taxation. Knowledge of personal, corporate and trust taxation and of accounting is required. A professional accounting designation or equivalent experience.
- Experience with various computer software applications, in particular Excel, Word, Tax Prep (or similar tax return software) and online research tools is required.
- Demonstrated knowledge of deceased and estate & trust tax return preparation and review, as well as the ability to recognize related tax matters would be an asset.
- Previous experience in the financial services industry or with a national trust company and familiarity with securities legislation would be an asset. Experience providing tax planning to clients would be an asset.
- Completed or currently enrolled in the CPA In Depth Tax Course is an asset. Completed or currently enrolled in the TEP program with the Society of Trust and Estate Practitioners (STEP) is also an asset.
- Bilingualism is a strong asset

#### **What Success Looks Like:**

You are passionate about the MD value proposition.

You are constantly learning and honing your skills.

You feel rewarded and recognized in a way that inspires you to do your best work.

You are engaged, enthusiastic and clearly understand how what you do contributes to MD's overall success.

Please direct your interest to [susan.lewis@md.ca](mailto:susan.lewis@md.ca), thank you.