Tax and Estate Planner – Vancouver

WHO WE ARE

Odlum Brown Financial Services Limited is a wholly owned subsidiary of Odlum Brown Limited (Odlum Brown) that provides financial planning, retirement, tax and estate planning, and insurance products exclusively to Odlum Brown clients.

Anchored in our purpose to help clients achieve their financial goals, Odlum Brown has remained an independent, full-service investment firm for over 100 years. Wholly owned by its team members, the firm continues its tradition of leadership in the financial community as one of BC's most respected investment firms.

We are honoured to be nationally recognized as one of Canada's Best Managed Companies and one of Canada's Most Admired™ Corporate Cultures, and to share the achievement of a century in business with our valued team members, clients and communities.

CULTURE AND VALUES

Guided by a set of timeless core values – Clients First, People, Accountability, Independence, Integrity and Community – we are very proud of the vibrant, ever-evolving culture that we have built over the years. These values are the cornerstone of our culture and the principles that provide a compass for our actions and unify us as a team.

PEOPLE

We have skiers, mountain bikers, hockey players, runners, volleyball players, movie buffs, bookworms, animal lovers, musicians, yogis, world travelers – all with diverse backgrounds and experiences to share from around the globe. You will work with really interesting people and make great friends, too.

COMMUNITY

We are serious about supporting the communities where we live and work. A recipient of a Canada's Volunteer Award from the Government of Canada, we are committed in heart and mind to everything we do in the community, and we work hard to inspire passion and fun while doing it.

PROFESSIONAL DEVELOPMENT

Continuous learning matters. We are committed to providing career-long support for learning and growth.

THE OPPORTUNITY

We have an opportunity for a Tax and Estate Planner to join our award-winning firm in the Vancouver office.

WHAT YOU'LL DO

Reporting to the Vice President of Odlum Brown Financial Services Limited, you will work in a collaborative team environment to advise existing clients and Investment Advisors on a variety of tax, estate and personal finance-related queries and strategies.

RESPONSIBILITIES

- Collect and analyze information pertinent to clients' financial goals
- Offer insight on clients' financial, tax, retirement and estate planning goals
- Prepare and review financial projections using leading software
- Review and interpret financial projections with clients and Investment Advisors
- Identify potential tax minimization and planning opportunities for clients
- Explain rules and concepts to clients and Investment Advisors relating to personal, corporate, and trust income tax, registered and non-registered accounts, trusts and estates, pensions and government benefits
- Develop timely tax and personal finance-related articles and bulletins
- Participate in the preparation and delivery of internal seminars and external presentations

KNOWLEDGE AND EXPERIENCE

- Professional accounting designation (CPA) and a minimum of five years post-designation tax experience required
- Certified Financial Planner (CFP) designation preferred and required within two years of start date
- Completion of the CPA In-Depth tax program would be an asset
- Other professional qualifications/designations relating to trusts and estates (TEP), life insurance (CLU) and/or experience with the entire life-cycle of personal trusts would be an asset

COMPETENCIES AND PERSONAL ATTRIBUTES

- Proven history of serving clients in a professional services environment
- In-depth knowledge and interest in personal finance and taxation, including private corporation and trust structures and the taxation of investment income
- Experience with the entire life-cycle of personal trusts
- Breadth and depth of tax and estate expertise to appropriately assess client needs and the various options available to them
- Competent at supporting clients with retirement and estate planning goals
- Experience with identifying risk areas to a client's plan and articulating possible insurance-based solutions (life and living benefits)
- Comfortable working with detailed and complex information
- Desire to remain current with developments and their potential impact on financial strategies
- Strong business acumen, judgment and savvy; excellent analytical and decision-making skills
- Excellent written and verbal communication and presentation skills

WHAT WE OFFER

A culture of openness, collaboration and respect is foundational to our firm. We are a diverse, driven group of individuals who genuinely care about one another and encourage and appreciate each other's contributions. We believe in rewarding team members and do this by providing a competitive total rewards package that is fair and equitable; mentorship programs; flexible work options; and a variety of professional development opportunities to expand your career. This role has an expected salary of $140,000+ year, plus the potential for bonuses.

Our team is growing, and we've got room for one more if you're interested. If this sounds like the environment you'd like to work in and you have the credentials and experience for this role, we invite you to submit a cover letter and resume to careers@odlumbrown.com by **November 8, 2024.**

Candidates must be legally eligible to work in Canada. Full disclosure of any restrictions must be disclosed at the time of expressing interest and supporting evidence provided prior to any potential offer of employment.

We appreciate your interest and thank you for taking the time to consider this opportunity. We will be in touch with individuals whose profiles most closely match what's needed to be successful in this role.