

Compliance Tax Analyst

SEARCH PROFILE

The Firm

Our client, Moodys LLP Tax Advisors (Moodys), is a professional services firm backed by vast experience in tax optimization. Their vision is to be a full service, top decile, multi-disciplinary, domestic and cross-border tax firm focused on excellence in client service in an entrepreneurial environment. The team is well established, their track record is impeccable, and they help their clients maximize their after-tax assets. They are specialized, efficient, and able to concentrate on providing outstanding personalized service to exclusive clients. They know tax consulting inside and out, and operate in 11 core areas: corporate tax, personal tax planning, estate planning, international tax (corporate, personal, general), US taxation services, tax disputes, GST, real estate taxation, and specialized tax counsel services to accountants and lawyers.



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The firm's values are:

- being professional in everything they do;
- helping clients to be more savvy regarding their tax situation;
- respecting professional and confidentiality boundaries;
- being accessible, so clients will always feel in touch;
- keeping clients in the loop as they develop custom solutions;
- basing strategies on the whole picture;
- removing risk elements;
- keeping strategies current;
- working hard and as a team;

- providing practical advice in plain English; and,
- fulfilling every commitment they make.

Moodys is unique in that ownership is shared between lawyers and accountants. It is a prestigious, growth oriented, innovative firm.

They are increasing the breadth of their service offerings by building their dynamic US cross-border tax practice. The cross-border team currently focuses on providing tax and estate planning services to US citizens living in Calgary, the Province of Alberta, throughout Canada, and around the world. It also provides services to Canadians moving to the US, working in the US, or investing in the US, as well as US companies operating in Canada and Canadian companies operating in the US.

For more information on Moodys, please visit www.moodystax.com

The Position

Reporting Relationships

This position reports to the Managing Partner in Calgary.

Working Relationships

This role will:

- Work with a team of 12 accountants, lawyers, and the legal team at Shea Nerland Calnan LLP.
- This person will work with a Tax Leader and its existing three associates.

Candidate Success Factors

Your success will be based upon you:

- Consistently providing flawless tax advisory services to clients;
- Focusing on service delivery and maintenance;
- Providing value added US tax services to clients;
- Reviewing and working on US complex tax returns;
- Working in a collaborative team culture;
- Pursuing excellence in execution, seeking opportunities for continuous improvement, and producing creative and/or unique work solutions;
- Embodying and sponsoring Moodys' values and vision, business goals and objectives through a variety of effective communication techniques and structures;
- Attending bi-weekly meetings for continuing education which discuss new developments in tax and estate planning;
- Supporting and implementing the firm's strategic direction; and,
- Exhibiting enthusiasm, collaboration, and a respectful, fun attitude.

The Individual

Ideally the successful candidate will possess the following education, experience, and personal characteristics:

Education

A Bachelor's degree combined with, at minimum, a CPA designation.

Experience

- An excellent understanding of US tax principles;
- Background in US tax compliance, including tax return preparation;
- Someone who has exhibited a high degree of discretion in the past and can be a trusted individual;
- Ability to write technical memos in a logical format; and,

- Proven ability to create clear, concise reports and presentations.

Personal Characteristics

- Must be a curious and action oriented team player;
- The individual must have high emotional intelligence and must be driven to positive thoughtful action;
- Well-organized, detail-oriented, enthusiastic and confident, with excellent problem-solving skills and a roll-up-your-sleeves attitude toward work;
- Someone who is willing to strategically experiment with new ideas, and not be afraid of making mistakes; and,
- A discreet and thoughtful individual.

Attractions

This position will provide the opportunity to:

- Work in the firm's US practice and to work in a firm with a unique structure. Their team of tax lawyers and tax accountants work together in their multi-disciplinary practice which allows them to better identify issues, and to research, create and implement optimal strategic plans for clients, all within one firm. They are the only firm that we are aware of that is structured in this way;
- Be one of the more knowledgeable and proactive resources for US tax and estate planning advice;
- Work in an open, respectful and collaborative environment that encourages all of its people to achieve their potential;
- Work in a high-performance culture;
- Be part of a successful and ambitious firm;
- Make an impact, see the positive results of your actions, and play an integral part in the success of the firm through your efforts;
- Be a succession planning candidate; and,
- Work in a firm that focuses on tax advisory services, not tax filings.

The Location

Calgary, Alberta.

FOR MORE INFORMATION, PLEASE CONTACT:

BluEra

Suite 1515, 505 – 3 Street SW
Calgary, AB T2P 3E6

Phone: 403.532.7959
Hilary Smith: Extension 227
Catherine Bell: Extension 228
