

Senior Tax Specialist

The Firm

Our client, Moodys LLP Tax Advisors (Moodys), is a professional services firm backed by vast experience in tax optimization. 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.

Working Relationships

This role will:

- Work with a team of 12 accountants, lawyers, and the legal team.

Candidate Success Factors

Your success will be based upon you successfully achieving:

Client Services

- Applying your sophisticated knowledge of tax planning and consulting to the firm's existing client base;
- Consistently providing flawless tax advisory services to clients;
- Developing and maintaining client relations and a strong book of business;
- Positively managing all aspects of client relationships; from business development to service delivery and maintenance;
- Consulting and directing multifaceted client engagements in a wide range of industries;
- Providing value added tax services to clients; and,
- Demonstrating an ability to anticipate outcomes and to adjust approaches and services accordingly.

Leadership

- Fostering and motivating a collaborative team culture;
- Mentoring and training junior team members, creating a sense of excitement and team and fostering an environment of continuous learning;
- Being a role model of professional conduct pursuing excellence in execution, seeking opportunities for continuous improvement, and producing creative and/or unique work solutions;
- Assisting in performance development, cross-training and succession planning initiatives in support of the attraction, retention and motivation of key team members;
- Attracting and retaining the right people to the team;
- Supporting the achievement of overall business goals by creating a positive and productive firm, coaching and developing others and recognizing team and individual accomplishments;
- Embodying and sponsoring the firms values and vision, business goals and objectives through a variety of effective communication techniques and structures;

Strategic

- Attending bi-weekly meetings for continuing education which discuss new developments in tax and estate planning;
- Supporting and implementing the firm's strategic direction;
- Developing a client-centric environment where the focus is on service delivery internally and externally;
- Promoting enthusiasm, collaboration, and a respectful, fun environment;
- Sharing appropriate firm information with employees to heighten their awareness of the firm's progress; and,
- Promoting constructive interpersonal communication methods and successful conflict resolution.

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 CA designation or a law degree, and completion of either the CICA in-depth tax course or a Master of Taxation.

Experience

- Progressive experience in a professional services environment, ideally servicing private clients and high net worth individuals;
- Background in staying aggressively up-to-date on new tax law and legislation;
- Successfully published leading edge articles relating to tax law and/or estate planning;
- A proven creative thought leader, and someone who knows that the details have to be right for the firm to be successful;
- A reputation for being highly service oriented;
- Demonstrated ability to lead and support a team through mentoring and coaching;
- Excellent client relationship building skills;
- The proven ability to provide full spectrum tax advice and guidance ranging from domestic to foreign owned entities including corporate structures, mergers and acquisitions, divestitures, inventory and other tax accounting methods, financial reporting, earnings and profit analysis, as well as litigation support;
- An affinity for the service sector is essential;
- Demonstrated ability to lead and support a team; and
- A background reflecting excellent conceptual, analytical, priority-setting, and problem-solving skills.

Personal Characteristics

- A true team player and someone who clients are immediately drawn to, and can trust;
- A superb communicator, both written and verbal;
- Someone who is fun and positive and will incite enthusiasm, provide vision, create positive morale, model a high standard of professionalism, and ensures that the work is delivered in a timely and satisfactory manner;
- Demonstrated initiative and motivation to continuous improvement of self and firm processes, and undying pride in work quality and job ownership;
- An “urgency to execute” attitude is essential;
- A high level of integrity, empathy, confidentiality, ethics, and a high client service orientation; and,
- A positive change agent – the ability and enthusiasm to question the status quo, identify areas for improvement, and recommend solutions.

Attractions

This position will provide the opportunity to:

- Work in a firm with a unique structure with domestic and international opportunities. Their team of tax lawyers and tax accountants work together in their multi-disciplinary practice which allows them to better identify issues, 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 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;
- Work in a firm that focuses on tax advisory services not tax filing.

The Location

Calgary, Alberta or potentially Toronto, Ontario

FOR MORE INFORMATION, PLEASE CONTACT:

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