# Tax Reporting Associate – Vancouver

This year, Odlum Brown is proud to celebrate 100 years as an independent, employee-owned, full-service investment firm. 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**

We are very proud of the vibrant culture that we have built and sustained for many years. It's the way we do things, how we make decisions and what defines which behaviours work and don't work – it's what makes up our DNA.

Our values are the cornerstone of our culture, a set of 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 and every other variety of person you can imagine. 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. In 2020, Odlum Brown was the recipient of the Canada's Volunteer Award in the Business Leader category for British Columbia and the North. This national recognition by the Canadian government is the result of our team members' actions and continued support for various causes and organizations in our communities. 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 Reporting Associate to join our award-winning firm in the Vancouver office.**

We are seeking a subject-matter expert with strong knowledge of tax reporting and client account processing. Reporting to the Supervisor, Corporate Actions and Taxation, the ideal candidate is committed to client service excellence, detail-oriented and driven to provide exemplary support to advisory groups in a fast-paced environment. This role requires a critical thinker and skillful decision maker, who can quickly adapt in a continuously changing regulatory environment.

**RESPONSIBILITIES**

- Provide expert advice in processes and best practices related to tax reporting to team members, Advisors and their advisory support teams
- Ensure deadlines are met with tax remittances to CRA and IRS and perform tax preparation during tax season

- Conduct reconciliations and ensure accuracy of tax reporting on income, reorganizations and manual adjustments
- Investigate discrepancies from reconciliations and make necessary adjustments accordingly
- Deliver client service excellence by responding to inquiries accurately and timely and serve as the first point of contact for escalation of any urgent issues
- Partner with Compliance, New Accounts and Financial Services departments to remain current on new developments in tax reporting, anticipate impact to existing processes and execute changes as required
- Review and audit client account applications and information, in accordance with rules and regulations related to QI, FATCA and CRS
- Ensure standard operating procedures are followed and service-level agreements are met in a fast-paced, service-driven environment
- Identify opportunities to streamline processes for operational efficiencies and collaborate with team members to document new and existing processes
- Participate in cross-functional department reporting, audit and review projects
- Maintain up-to-date knowledge of taxation industry by participating in relevant meetings and seminars
- Engage in ongoing learning and professional development to increase knowledge as a subject-matter expert

**KNOWLEDGE AND EXPERIENCE**

- Minimum 3 years of investment industry experience in Client Services, with extensive knowledge of tax reporting processes
- Self-starter and continuous learner with the capacity to work independently, along with flexibility and willingness to assist others
- Critical thinker and skillful decision maker, adaptable in a changing regulatory environment
- Excellent organizational skills, able to prioritize important and time-sensitive tasks
- Ability to work efficiently and accurately in a fast-paced, dynamic environment, with a sharp eye for detail
- Strong verbal and written communication and presentation skills
- Experience with the Broadridge Dataphile platform or similar bookkeeping system
- Proficiency in Word and Outlook and intermediate proficiency with Excel (e.g. ability to manipulate large data sets using nested formulas, pivot tables and macros)
- Completion of securities and investment industry-related courses is an asset
- This role does not require a CPA designation

At 100 years young, 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 job, we invite you to submit a cover letter and resume to careers@odlumbrown.com by **January 31, 2023**.

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.