



Team Manager, Wealth, Tax and Government Wealth Operations

Department Overview

TD Wealth Management Operations is the operation engine for TD Wealth Management. Wealth Management Operations supports all TD Waterhouse distribution channels, TD Mutual Funds, TD Investments Service Inc., and TD Securities.

The Wealth Tax and Government reporting department is responsible for allocating, preparing and issuing tax slips according to the tax eligibility of the instrument and the government requirements. The Tax department is also responsible for ensuring that all CRA and IRS guidelines are adhered to. When not in tax season, the department is responsible for the project development and management for the upcoming tax season

Job Description

Accountable for a team of 7 team members (with added agency staff for tax season) for all aspects of people management: hiring, performance reviews, personal development and performance management. The job also involves maintaining a high standard of work quality, excellent relationship with our business partners as well as adhering to all regulatory requirements within their prescribed timeframes.

The position provides a unique, exciting opportunity for someone with strong leadership and communications skills who is keenly interested in developing people and wants to make an impact. It is also an excellent opportunity for developing skills and experience in a constantly changing regulatory environment.

- Demonstrate proactive leadership by ensuring your employees provide legendary customer service.
- Provide day to day direction ensuring efficient and effective delivery of services and solution in accordance with established SLA's, compliance and regulatory guidelines.
- Lead and coach a team to improve strategies for providing a good customer experience, and enhance procedures.
- Lead and implement the staff development process to enhance their personal and professional skills through courses available internally or externally, as required. Improve the employee experience.
- Create and promote a cohesive team and foster a positive work environment.
- Meet quality and compliance standards and take measures to achieve bank team targets.
- Coach and lead the team to achieve set business objectives and Key Performance Indicators (KPI's).
- Lead and model Operation Management Principles activities and culture within the unit in order to forecast volumes, plan resource activities and monitor and control daily productivity.
- Comply with the policies of the bank and various government agencies.
- Always provide high quality service when dealing with clients to demonstrate Wealth Shared Services commitment to putting our clients first.
- Protect the bank's interests and minimize risk by complying with procedures, standards and controls.
- Contribute to the bank's success by being familiar with regulatory changes and implementing the changes required into procedures.
- Consistently demonstrate the key attributes of the TD Leadership Profile.
- Promote and support reward and recognition programs.



Requirements

- Strong Canadian and US Regulatory knowledge
- Strong leadership, people management skills and relationship management skills
- Strong time management and organizational skills to manage multiple deadlines and priorities within a highly demanding environment
- Detail oriented with the ability to delegate and follow up for timely responses/resolutions
- Escalate issues upon discovery
- Strong computer skills including MS Word and MS Excel is a requirement
- Experience in a taxation department is an asset
- An established track record of providing exceptional customer service
- Flexibility to adapt to changing requirements during tax season

Additional Information

- College or University education with a related business field is required.
- Excellent PC Operations Knowledge and use of Microsoft software such as Excel, Word etc.
- Good knowledge of Canadian, US and Foreign Income tax rules pertaining to tax related items
- Previous people management experience preferred.

Please apply on our website:

<https://jobs.td.com/en-CA/jobs/8978206/team-manager-ii-wealth-tax-and-government-wealth-operations-toronto-ca/>