



Create the customer experience you want to see.

The Brokerage Operations team processes entries and updates requests by clients, interdepartmental requests and those by various regulatory groups in a timely manner. As a member of the Brokerage Operations team, you have the opportunity to become a part of the team that has the “best manager in town”. No, those aren’t our words, that’s what our Brokerage Ops employees are saying!

What’s it like working as an Analyst, Tax Reporting at Questrade?

The purpose of the Analyst, Tax Reporting functions is to provide support to the tax team with operational processes, including client documentation review, and tax reporting to clients and regulators, to comply with Canadian & US tax regulations.

Questrade Inc., has multiple client tax reporting obligations to various tax regulators, including the Canada Revenue Agency (CRA), Ministère du Revenu du Québec (MRQ) and the Internal Revenue Service (IRS). In addition, there are also regulatory obligations to obtain sufficient documentation from the client to identify their tax residency. This role performs and/or assists with operational processes that support the tax team in ensuring all regulatory obligations continue to be met.

Need more details? Keep reading...

You will perform periodic tasks as needed to comply with Canadian and US tax reporting regulations such as: review documentation on client accounts and determine appropriate tax residency, prepare/coordinate payment requests for withholding tax remittance to regulators, reconciliations of income and withholding tax and respond to internal and external tax related queries. You will also participate in the preparation of client and regulatory tax reporting such as reviewing & entering provided tax factors for securities in the tax system and reviewing & entering provided client and/or securities transactions in the tax system. You will complete securities & corporate actions research by reviewing securities to determine most appropriate type to ensure income is reported on the correct tax slip and reviewing corporate actions to determine US and/or Canadian tax applicability. You will also track work completed & any errors found. You will identify and bring process improvement opportunities to the table. You will also collaborate with other team members, or other departments and complete other ad hoc duties and projects, as assigned.

So are YOU our next Analyst, Tax Reporting? You are if you have...

- ✓ Post-secondary education, preferably in Finance, Economics, or related field
- ✓ Prior work experience in a Tax Reporting role, focusing on Canadian and/or US tax reporting to clients
- ✓ Prior work experience (2 years+) in an operational, continuous improvement or client service role, preferably within a financial services organization
- ✓ Experience in client and/or securities taxation
- ✓ Intermediate/Advanced knowledge of Excel or Google Sheets
- ✓ Excellent written and verbal communication skills
- ✓ Detail oriented, a self-motivated individual with the ability to work independently with little supervision
- ✓ Strong analytical skills to manage large data
- ✓ Excellent organizational skills
- ✓ Strong work ethic, result focused, and deadline driven



- ✓ Strong research and problem solving skills
- ✓ Strong continuous improvement mindset, and a desire to bring improvements to the table
- ✓ A collaborative team player, flexible, and with a strong customer service mindset

Brownie Points if you have...

- ✓ Experience with Qualified Intermediary obligations
- ✓ Knowledge of the securities industry
- ✓ Experience with Broadridge systems
- ✓ Successfully completed the CSC
- ✓ Successful completion of tax courses, or working towards a CPA

Sounds like you? Click the link below to apply!

Please complete an online application through our Careers Page, via the following link:

https://workforcenow.adp.com/mascsr/default/mdf/recruitment/recruitment.html?cid=02f58d3a-7441-4647-9f3e-376f6c2fb1ec&cclid=19000101_000001&jobId=403379&source=CC2&lang=en_CA

At Questrade Group of Companies, with multiple office locations around the world, we are committed to fostering a diverse, inclusive and accessible work environment. We value the unique skills and experiences each individual brings, and believe that when our teams feel supported and motivated, their creativity becomes a source of innovation. We are also committed to creating and sustaining a collegial work environment in which all individuals are treated with dignity and respect and also one which reflects the diversity of the communities we serve and operate in to help us revolutionize financial services for the benefit of all of our customers.

Candidates selected for an interview will be contacted directly. If you require accommodation during the recruitment/selection process, please let us know and we will work with you to meet your needs.