Create the customer experience you want to see.
The Brokerage Operations team at Questrade processes entries and updates requested by clients, various regulatory groups and interdepartmental requests in a timely manner. As a member of this team, you have the opportunity to work with the "best manager in town." No, those aren't our words – that's what our Brokerage Operations employees are saying!

And where does the Supervisor, Tax Reporting fit into this?
The purpose of the Supervisor, Tax Reporting function is to plan and monitor the daily activities within the Tax Reporting team, ensuring timeliness and accuracy are consistently achieved, with a positive customer experience front and center. Additionally, the individual assists the Manager, Tax Reporting to scope project requirements, process documentation and change, and conduct user acceptance testing for system changes.

What's it like working as a Supervisor, Tax Reporting at Questrade?
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. Based on tax residency, withholding tax obligations must be met.

The Supervisor, Tax Reporting, works collaboratively within the supervisory & management group, and leads a group of tax analysts and senior analysts to ensure periodic and ad-hoc activities are performed in a timely and accurate manner to meet the above noted obligations. Metrics on periodic and ad-hoc activities are collected, interpreted and reported on. Service quality is monitored, and any gaps are resolved efficiently and effectively.

The individual is expected to be the SME on Canadian &/or US taxation, and act as the central point for client issues. In addition, the individual is expected to review processes and documentation that affects client tax reporting to ensure applicability, completeness and accuracy, with a continuous improvement mindset, keeping a positive client experience front and center.

Need more details? Keep reading...
In this role, you will lead and monitor periodic and ad-hoc activities that lead to successful Canadian and US client tax reporting. You will lead and monitor tax season project plan, to ensure all regulatory deadlines are met or exceeded. You will lead discussions to ensure accurate classification of securities and income for tax reporting. You will ensure timely remittance of payments to the CRA, MRQ and IRS. You will reconcile internal tax remittance accounts with tax accounts with each regulator. You will conduct audits of client documentation to meet QI/FATCA requirements.

You will manage distribution of client tax reporting related cases, and ensures timely resolution, providing recommendations for complex issue resolution and appropriate process improvements. You will schedule weekly team meetings, and ensure active and fulsome participation. You will maintain the team by recruiting, selecting, orienting, and training employees, maintaining a collaborative, positive, safe, secure, and legal work environment, creating and managing personal growth opportunities. You will assess training needs within the team and collaborate with Training and Tax Reporting Managers to design and deliver employee training. You will accomplish team results by clearly communicating job expectations; plan, monitor, and appraise job results; coach and discipline employees; develop, coordinate, and enforce system, policy, procedure, and productivity standards. You will lead team process improvement initiatives, and inspire others to make operational processes more efficient. You will collaborate with team members, peers, department heads and administrators to identify and implement process efficiencies and changes affecting tax reporting in other teams. You will write and/or update policies and procedures.

You will coordinate internal resources for team, department and organization wide projects, and assist Tax Manager, Project Managers, and Business Analysts to ensure flawless execution of projects. You will provide oversight over applicable outside service providers and ensure all parties meet their SLA's. You will builds positive and productive relationships with internal teams and external third party service providers. You will assist with establishing short and long term goals by gathering pertinent business, service and operational information and metrics, and subsequently identifying, evaluating and choosing a course of action, defining objectives and evaluating outcomes. You will perform other duties as assigned.

So are YOU our next Supervisor, Tax Reporting? You are if you…

✓ Have a university or post-graduate degree
✓ Have 5+ years' experience in client tax reporting, ideally within the brokerage industry
✓ Have 2+ years' experience in leadership roles, ideally with client tax reporting
✓ Are considered a SME in Canadian and/or US client tax reporting and filing processes (ideally both)
✓ Have knowledge of U.S. withholding certificates (e.g., W-9s, W-8s), and Qualified Intermediary requirements
✓ Have knowledge of FATCA and CRS reporting requirements
✓ Have working knowledge of dividends, income processing, reorg, registered plans
✓ Have working experience with book of records and back-office operational systems and processes
✓ Have excellent written and verbal communication skills
✓ Are Detail oriented, with the ability to work collaboratively in a fast-paced and deadline driven environment
✓ Have strong work ethic with a focus on achieving quality results
✓ Have strong organizational and time management skills
✓ Are independent, self-motivated, and the ability to motivate others to exceed expectations
✓ Have the ability to manage competing priorities effectively, both on a personal and team level
✓ Have strong research & problem solving skills, with strong analytical skills to manage large datasets
✓ Have strong continuous improvement mindset, and a desire to bring improvements to the table and see them to completion
✓ Are a collaborative and flexible team player
✓ Are passionate about delivering a positive client experience

Brownie points if you have…

✓ Completed tax related courses, or industry designations such as CSC or CPA
✓ Have knowledge of Broadridge BPS and TFP systems
✓ Have knowledge of database queries (e.g. SQL)
✓ Have Google Suite experience

Sounds like you? Click 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&ccId=19000101_000001&jobId=403377&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.