

Tax Operations Specialist, Remote, Mississauga ON

ABOUT US

At Edward Jones, we help clients achieve their serious, long-term financial goals by understanding their needs and implementing tailored solutions. To ensure a personal client experience, we have located our 15,000+ branch offices where our more than 7 million clients live and work.

In a typical branch office, a financial advisor meets with clients and receives branch office support, so they can focus on building deep relationships with clients. Headquarters associates in St. Louis, Tempe and Mississauga provide support and expertise to help U.S. and Canada branch teams deliver an ideal client experience. We continue to grow to meet the needs of long-term individual investors.

Edward Jones does not discriminate on the basis of race, color, gender, religion, national origin, age, disability, sexual orientation, pregnancy, veteran status, genetic information or any other basis prohibited by applicable law.

JOB OVERVIEW

In the Canadian Operations division at Edward Jones, you'll focus on creating the ideal client and branch experience. As the backbone of the branch, your work will support all client transactions and processing through the lifecycle of the client relationship. Through strategic thinking and cross-functional collaboration, you'll continuously identify opportunities for operational efficiency and risk mitigation, supporting the firm in its key objectives. You'll assist in developing innovative business solutions for clients and branch teams through working in partnership with Operations teams:

- Corporate Actions
- Retirement
- Client Reporting
- New Accounts
- Product Master File
- Estates

This position has responsibility for accomplishing advanced technical tax functions, including analyzing large volumes of account activity, interpreting complex regulatory rules as they apply to our operational and reporting responsibilities, and making decisions that have a high level of risk or that may have legal, regulatory, reputational, or financial implications. Decisions must ensure collaboration with a variety of business areas and support functions within these areas. The position is required to understand industry rules and regulations and the impact they have on tax reporting functions, systems, and controls; along with identifying inherent and potential risks including making recommendations for mitigation. The position may have a variety of daily and periodic responsibilities based on the department's business need and requires a strong working knowledge of tax regulations, financial services industry rules, processes, systems, and controls.

REQUIREMENTS

- High school diploma or equivalent required. Bachelor's degree in finance, business, or accounting preferred.
- 3-5 years of experience in the financial services industry is required. Experience in tax reporting, corporate actions, cost basis, account opening, estates and/or retirement is preferred.
- knowledge of complex systems and interdependencies within Operations is required.
- analytical skills with intermediate to advanced aptitude in creating complex spreadsheets and formulas, running and building data queries and analyzing the results, using internet reference material and external resources to proactively develop measures, make decisions, or to manage ongoing controls for the business area.
- advanced problem solving and decision-making skills.
- effective communication skills in both written and verbal mediums with an ability to tailor the messaging for a wide audience.

- adapt and incorporate past experience to enable the business area to achieve greater results with increased efficiency and automation.

Want a meaningful career where you can make a difference? Edward Jones sounds perfect for you.

Collaboration. Autonomy. Opportunity. Words our headquarters associates use when talking about working at Edward Jones. Words that describe what it's like being part of a firm where everyone is aligned toward a singular focus: serving the client. And everyone is working to make the firm better together – as they grow as individuals. If these words resonate with you, we should talk. [Click here](#) to apply.