

Manager, Tax & Estate Planning

LIFE AFTER LAW is [Canada's only recruitment firm dedicated to placing lawyers in corporate counsel and quasi-legal/ non-traditional roles](#)

Our client, a leading Canadian provider of insurance and investment products is looking to add a Manager of Tax & Estate Planning to their team.

Reporting to the SVP, Marketing you will head up the company's national Tax & Estate Planning services. This role will support the company's efforts to attract and retain Advisors in the middle market, and contribute to their seeing the company as their preferred carrier. The incumbent will work closely with marketing in development and deployment of supporting related materials/tools/communications, as well as supporting Sales related activities.

Your responsibilities will include:

- providing tax and estate planning support to select advisors via the National Sales Teams;
- assisting with and possibly arranging Tax & Estate Planning speakers for major events
- providing input and expertise for the development and maintenance of Tax & Estate Planning related Sales/Marketing support tools/communications
- assisting marketing with concept and sales/marketing material research, planning, development, and maintenance
- staying current in related topics/fields, and participation in related associations and trade groups
- assisting in collecting regular feedback from advisors and field marketing reps on Tax & Estate planning topics
- managing Sales/Marketing related relationships with related third party accounting and law firms
- managing external relationships that can be leveraged to support tax & estate planning sales/marketing, and managing the associated budget
- working closely with legal/finance/procurement

You are the ideal candidate if you:

- are a lawyer, CA or CGA
- have 5 years experience in insurance or financial services tax/estate planning
- possess excellent tax and/or estate planning knowledge
- are bilingual
- have exceptional client focus with strong professional acumen
- are able to cultivate relationships with advisors and clients
- have excellent communication and presentation skills

If this describes you, and you are interested in joining a progressive, employee focused organization that provides an intellectually stimulating work environment and provides a competitive compensation and bonus package, send us your details.

Life After Law
2 St. Clair Ave East
Suite 800
Toronto, ON M4T 2T5
T: 416-789-1444
F: 416-789-4114
info@lifeafterlaw.com
www.lifeafterlaw.com