Supervisor, Corporate Actions, Taxation, Estate and Trust – Vancouver

FIRM OVERVIEW

Anchored in our purpose to help clients achieve their financial goals, Odlum Brown has remained an independent, full-service investment firm for 100 years. Wholly owned by its team members, the firm continues its tradition of leadership in the financial community as one of BC's most respected investment firms.

We are honoured to be nationally recognized as one of Canada's Best Managed Companies and one of Canada's Most Admired™ Corporate Cultures, and to share the achievement of a century in business with our valued team members, clients and communities.

CULTURE AND VALUES

Guided by a set of timeless core values – Clients First, People, Accountability, Independence, Integrity and Community – we are very proud of the vibrant culture that we have built and sustained for many years. These values are the cornerstone of our culture and the principles that provide a compass for our actions and unify us as a team.

PEOPLE

We have skiers, mountain bikers, hockey players, runners, volleyball players, movie buffs, bookworms, animal lovers, musicians, yogis, world travelers and every other variety of person you can imagine. You will work with really interesting people and make great friends, too.

COMMUNITY

We are serious about supporting the communities where we live and work. A recipient of a Canada's Volunteer Award from the Government of Canada, we are committed in heart and mind to everything we do in the community, and we work hard to inspire passion and fun while doing it.

PROFESSIONAL DEVELOPMENT

Continuous learning matters. We are committed to providing career-long support for learning and growth.

THE OPPORTUNITY

Odlum Brown is currently seeking a Supervisor of Corporate Actions, Taxation, Estate and Trust to join our award-winning firm in the Vancouver office.

We have an opportunity for an experienced, hands-on Supervisor to lead our Corporate Actions, Taxation, Estate and Trust team. This role requires a subject-matter expert who manages the day-to-day processing in our Client Services department. The successful candidate is analytical and process-driven, and seasoned at juggling competing priorities and ensuring tasks are executed with speed and accuracy. This role will also provide you with the opportunity to apply your passion for team development and desire for continuous improvement, while delivering exceptional client service.

RESPONSIBILITIES

- People Leadership:
  - Inspire, coach, support and develop the Corporate Actions, Taxation, Estate and Trust team
  - Conduct formal performance review activities; coach for performance all year long
  - Support continuous learning and development of team members
  - Leverage the talent management program to identify and mentor emerging leaders for succession planning initiatives
  - Recruit internal and external candidates using best-in-class recruitment practices that align with the firm's core values
- Process Management:
  - Coordinate and supervise activities required for the effective day-to-day operation of the Corporate Actions, Taxation, Estate and Trust team
  - Support training programs directed towards our investment advisory team
  - Review and improve existing practices and streamline department processes
  - Provide guidance to the team on responding to exception scenarios and addressing deficiencies, while considering various stakeholder positions
  - Anticipate challenges and plan strategically for future growth opportunities
  - Develop subject matter expertise for all facets of Corporate Actions, Tax Reporting and Estate and Trust requirements, including maintaining up-to-date reference manuals
  - Maintain high level of data accuracy for assurance in quality output
- Professional Competencies:
  - Strong business acumen; excellent judgment, analytical and decision-making skills
  - Self-confident team player with the ability to develop positive and productive relationships
  - A high degree of self-discipline with superior time management and organizational abilities to juggle multiple and competing priorities
  - Problem-solving abilities accompanied by initiative to leverage technology to identify, streamline and implement processing improvement opportunities
  - Exercise good judgment in setting priorities and undertaking complex administrative tasks

KNOWLEDGE AND EXPERIENCE

- Minimum of five years of corporate actions, tax reporting, estate and trust or related industry experience
- Minimum of three years of proven people leadership skills
- Undergraduate degree or equivalent work experience in a business-oriented discipline
- Proven ability to deliver results within prescribed deadlines
- Excellent verbal and written communication skills
- Ability to problem solve and exercise good judgment and decision making within a regulatory framework
- Experience with Broadridge's Dataphile platform or similar data processing system
- Proficiency in MS Office (Outlook, Word, Excel and PowerPoint)
- CSC, CPH, IFC, CPA is an asset

At 100 years young, our team is growing, and we've got room for one more if you're interested. If this sounds like the environment you'd like to work in and you have the credentials and experience for this role, we invite you to submit a cover letter and resume to careers@odlumbrown.com by **June 23, 2023.**

Candidates must be legally eligible to work in Canada. Full disclosure of any restrictions must be disclosed at the time of expressing interest and supporting evidence provided prior to any potential offer of employment.

We appreciate your interest and thank you for taking the time to consider this opportunity. We will be in touch with individuals whose profiles most closely match what's needed to be successful in this role.