

## Trust and Estate Technician

### Position Overview

#### Overview

Bossy Nagy Group Chartered Professional Accountants (BNG) is a highly qualified and committed team of accountants and administrative professionals who share a goal and a purpose: to help our clients build better businesses. BNG offers a wide range of assurance and business advisory services from three offices in Southwestern Ontario: Tillsonburg (head office), Delhi and Woodstock.

BNG is recognized as a leader in the accounting and business coaching field. Using proprietary processes and keeping a strong focus on results, we help our clients discover their strengths and make the most of business opportunities.

BNG is seeking a motivated, compassionate, client-focused Trust and Estate Technician to support our growing Trust and Estate practice. This position will work closely with the Manager, Estate and Trust Services to carry out such duties as preparing deceased taxpayer returns and helping to compile year-end financial statements, correspondence and supporting materials for trusts and estates. **The successful candidate will have the potential to assume the Manager, Estate and Trust Services position over the coming 3 to 5 years, based on BNG's succession plans.**

The ideal candidate will have a college diploma or university degree in accounting, bookkeeping, legal administration or related field, and will have earned or is willing to pursue the CETA (Certificate in Estate and Trust Administration) designation.

Reporting to the Manager, Estate and Trust Services, the Trust and Estate Technician will be responsible for:

#### 1. Estate Administration / Accounting

- Collect all pertinent information required to complete returns, including gathering information from external parties (investment advisors, lawyers, etc.)
- Accurately track various deadlines for large volume of client files
- Prepare and file deceased taxpayer and T3 returns

#### 2. Estate and Succession Planning

- Remain current with, and continually deepen knowledge of, estate tax regulations and legislation; participate in continuing education and see to continually expand knowledge base
- Provide technical support to the Manager, Estate and Trust Services in Succession Plan and Estate Plan development, including will planning
- Develop a thorough understanding of the client's circumstances and help investigate viable options to support unique situations
- Collaborate with the Manager, Estate and Trust Services to devise strategic and creative solutions to meet the desired outcomes of the client

The successful candidate will bring the following skills, experience and behavioural attributes to the role:

<i><b>Skills and Experience</b></i>	<i><b>Attributes</b></i>
<ul style="list-style-type: none"> <li>- University degree or college diploma in accounting, business or legal administration (equivalent experience will be considered)</li> <li>- Earned, or is in the process of earning, or is willing to pursue the Certificate in Estate and Trust Administration (CETA)</li> <li>- Working knowledge of accounting principles and understanding how to research issues</li> <li>- Proven track record of establishing and fostering strong professional relationships</li> </ul>	<ul style="list-style-type: none"> <li>- Superior attention to detail</li> <li>- Strong analytical skills and good business acumen</li> <li>- Excellent planning, organization and execution skills</li> <li>- Highly client-focused: meets deadlines; willing to work additional hours as needed during peak periods</li> <li>- Collaborative – integrates information across the organization</li> <li>- High level of integrity and accountability</li> <li>- Effective communicator</li> <li>- Compassionate; empathetic to clients experiencing challenging life transitions</li> <li>- Resourceful, creative and adaptable; able to come up with ‘out of the box’ ideas</li> </ul>

If you are interested in being considered for the Trust and Estate Technician position, please submit your resume and cover letter to the attention of Human Resources, by emailing [hr@bng-cpa.ca](mailto:hr@bng-cpa.ca) by March 27, 2020. For more information about Bossy Nagy Group, please visit our website at <https://bng-cpa.ca/>.

Bossy Nagy Group welcomes and encourages applications from people with disabilities. Accommodations are available on request for candidates taking part in all aspects of the selection process.

Thank you for your interest in joining Bossy Nagy Group. Applicants selected for an interview will be contacted directly.