



Based in Montreal, Patrimonica is a "multi-family office" catering to high-net-worth individuals and families, who are looking for a trusted team to supervise their financial situation. Patrimonica offers accounting and tax advisory services, as well as portfolio management services through its subsidiary, Patrimonica Asset Management.

The firm relies on four core values to deliver its mission:

- Human focus
- Independence
- Excellence
- Innovation

SENIOR DIRECTOR, CONSULTING SERVICES

In general, the Senior Director will take charge of certain client files, in addition to reviewing the files of advisors and directors, ensuring the management of the consulting team in order to meet all deadlines and the accuracy of files, and will offer support and training for the team. He actively participates in clients' financial and estate planning and brings his expertise to complex cases.

Your role at Patrimonica Advisory :

- Management and supervision of mandates and deadlines
- Revision of the accounts and financial statements prepared by the advisers and directors for the different entities
- Revision and / or preparation of tax returns for the different entities
- Revision and / or preparation of different tax slips for different entities
- Presentation of financial statements and tax returns to clients
- Participation in the management of the mandate calendar
- Staff training
- Carrying out various special mandates (financial planning, inheritance, will, tax reorganization, etc.)
- Participation in meetings with clients to fully understand their expectations and needs
- Preparation of service offers and presentations
- Participation in customer invoicing
- Advising and collaborating with the investment team on the implementation of the tax aspects of the investment policy.

Requirements :

- A minimum of 10 years of relevant experience
- CPA title
- Experience in an accounting firm
- In-depth knowledge of taxation
- Profound knowledge of investment accounting
- Experience with holding companies, trusts and foundations
- Knowledge of financial and estate planning is a strong asset
- Bilingualism essential (English and French)

Personal skills and abilities :

- Rigor and attention to detail essential
- Great sense of leadership
- Excellent time management and work organization skills
- Ability to solve practical problems; very motivated by the achievement of results
- Team spirit with a positive attitude
- Excellent written and oral communication skills

Workplace: 1130 Sherbrooke Street West, Montréal – Hybrid formula of remote work vs in office

WHAT WE OFFER

- ✓ Very competitive salary
- ✓ Generous annual bonus program
- ✓ Group insurance, including dental, glasses and disability, paid at 70% by the employer
- ✓ Group RRSP with employer contribution
- ✓ Compressed summer schedule for July to September (1/2 day off per week or 1 day per 2 weeks)
- ✓ Holiday leave: 5 paid days off, including the two statutory days
- ✓ Day off on birthday
- ✓ Allowance for physical activity or other benefit chosen by the employee
- ✓ Telecommuting allowed (2-3 days a week), including all computer equipment at home

Employment status: Permanent, full time – flexible schedule

To apply, please visit our Careers page on our website: patrimonica.com/careers

WHY WORK AT PATRIMONICA?

- Competent and committed team
- Excellent working atmosphere
- Innovative thinking
- Family Office industry leader
- Great potential for growth

The use of the masculine gender has been used in order to lighten the text and make it easier to read. The position is open to anyone who meets the requirements of the position, without discrimination.