

**Role Title**
**Director, Tax**
**Role Summary**

Whitehorse Liquidity Partners (“Whitehorse”), based in Toronto, is a fast-growing private equity firm focused on accelerating liquidity on private equity portfolios through structured solutions. Whitehorse seeks to provide customized and flexible liquidity solutions for private equity investors through the use of structured solutions with existing investors or outright purchases of portfolios which are subsequently structured into different securities. Whitehorse currently has US\$3.4B under management across three funds. Whitehorse is seeking diverse, energetic, and dynamic individuals who thrive in a fast-paced, high-performance, entrepreneurial environment.

The Director, Tax plays an essential role in leading all tax matters related to the various Whitehorse funds and related vehicles with support from both internal team members and external advisors. Reporting to the VP, Tax, the Director of tax will be required to work closely with the tax team, the legal team, the CFO, the finance team, the deal teams, and external tax and legal advisors in order to fulfill this mandate.

To perform the role successfully, an individual must have superior technical understanding of and skills in US tax, organization and project management skills, excellent verbal and written skills, strong collaboration skills, and a great attitude that supports Whitehorse’s values of teamwork, humbleness, and strong performance.

**Role-Specific Accountabilities**

- Lead compliance process for all fund related vehicles and corporate entities controlled by the investment manager, including Canadian and US tax returns for partnerships and corporations, and all other tax reporting
- Lead HST/SLFI reporting process, including liaising with investors annually to compute the relevant GST/HST rate for each fund vehicle under the special attribution method
- Lead FATCA and CRS annual filings.
- Lead the efforts related to tax diligence, modelling, and structuring assistance where needed. The Candidate will be working closely with external legal and tax advisors to assist deal teams and will need to build strong relationships with them
- Ensure a smooth transition of information gathered during the deal process to the compliance process
- Develop tax planning strategies that support Whitehorse’s rapid growth and communicate these strategies to the senior team
- Develop and implement processes that help streamline the entire tax process. The Candidate must be proactive and must be a problem solver
- Work with the finance team to ensure distribution notices and other investor correspondences reflect relevant tax planning strategies and tax information
- Work with the legal team and external tax advisors to review subscription documents provided by investors
- Other ad hoc tax analysis and projects as required
- Develop plans to build out the tax team to ensure that Whitehorse is staying ahead of complexity

## **Education, Experience & Capabilities**

- Senior Manager (or higher) level experience in a US tax practice, ideally focused mostly on partnership tax
- Minimum of 7 years of relevant experience with exposure to M&A and International tax
- University training in accounting or law with specialization in taxation
- Some exposure to Canadian tax is helpful but not required
- Must be comfortable using technology as both a current tool to get the job done and as a means to develop future efficiencies and processes
- Must have the ability to multi-task and work in a very fast-paced, results-driven environment
- Must have the ability to communicate complex tax matters and issues in a clear and concise manner
- Must have a growth mentality. Whitehorse is always innovating and growing, and candidates for this role must be open to constant change to be able to grow with the firm

At Whitehorse Liquidity Partners, we are committed to fostering an inclusive, accessible environment where all employees feel valued, respected and supported. We are an equal opportunity employer that values a diverse workforce and a culture that reflects and celebrates diversity of thought, background and experience.

If you require an accommodation for the recruitment/interview process, please let us know when selected to take part in our recruitment process so that reasonable arrangements can be made for the appropriate accommodations to be put in place.

We thank you for applying, however, only those selected to continue will be contacted.