

# Associate Director, M&A Planning & Integration

Job ID  
REQ-10008981  
Sep 04, 2024  
USA

## Summary

This person is responsible for developing and implementing the Novartis tax planning strategy. To ensure alignment with the overall business strategy, the AD of M&A Planning & Integration will need to partner closely with other business stakeholders and within the tax function. With the acquisitive nature of Novartis, this role will need strong due diligence and tax technical knowledge. The role is key in driving the strategic direction of an inclusive, globally integrated, finance based and functionally connected US tax organization, covering end-to-end all relevant aspects of US tax and ensuring alignment to Novartis overall business plans.

This role is required to be in our East Hanover, NJ office 3x/week.

## About the Role

### Your Key Responsibilities

#### Leading Tax

- Support the continuous development of a finance/accounting based tax organization with analytical orientation prepared for internal and external needs and challenges.
- Lead the US tax effort and maximize the value delivered in support of federal and state tax reporting, compliance, and controversy, act as trusted and respected advisor with stakeholders and senior management.
- Provide leadership and technical support as a function aligned with tax compliance, tax provision, tax planning and transfer pricing based on strong finance and accounting skills, promoter of the strategic integration of US Tax into the local and global Novartis organization including business partnering and technical expertise on all dimensions of tax reporting.
- Representative of US tax function with policy makers, fiscal authorities, industry associations, tax director community and other external stakeholders to front Novartis on specific tax matters.

#### Planning, Compliance and Risk Management

- Complete all aspects of the M&A and BD&L process, including Due Diligence, contract review, funding, tax structuring, and negotiations.
- Transition Due Diligence knowledge and collaborate closely with Tax Operations and Accounting teams on the tax Opening Balance Sheet discussions and review, including taking positions on whether Valuation Allowances are needed for Deferred Tax Assets.
- Provide high-level review of the pre-acquisition and the stub tax returns.
- Draft and maintain step plans for integration and tax planning transactions.
- Provide detailed analysis of integration and other planning projects, including the estimated effect on

cash-taxes, Effective Tax Rate, and book/tax differences.

- Research and draft tax memoranda on a variety of complex tax matters and provide well-organized verbal or written tax advice and assistance to tax operations and tax audit functions, especially as relates to Information Document Requests.
- Monitor, document, and assess the impact of the changing legislative environment, including Corporate Alternative Minimum Tax (“CAMT”) and Excise Tax, as applicable for the Company.

**Role Requirements:**

- Economics/Finance/Law/Accounting degree, with further accredited accounting and/or tax qualification (e.g. CPA, Tax Expert)
- Minimum 8+ years of US Tax experience in Big 4 and/or corporate department of a large publicly held multinational company

**Languages:**

- English

**Why Novartis:** Helping people with disease and their families takes more than innovative science. It takes a community of smart, passionate people like you. Collaborating, supporting and inspiring each other. Combining to achieve breakthroughs that change patients’ lives. Ready to create a brighter future together? <https://www.novartis.com/about/strategy/people-and-culture>

**Benefits and Rewards:** Read our handbook to learn about all the ways we’ll help you thrive personally and professionally: <https://www.novartis.com/careers/benefits-rewards>

**Commitment to Diversity & Inclusion:** Novartis is committed to building an outstanding, inclusive work environment and diverse teams’ representative of the patients and communities we serve.

**Novartis Compensation and Benefit Summary:** The pay range for this position at commencement of employment is expected to be between \$144,000 - \$216,000 / year; however, while salary ranges are effective from 1/1/24 through 12/31/24, fluctuations in the job market may necessitate adjustments to pay ranges during this period. Further, final pay determinations will depend on various factors, including, but not limited to geographical location, experience level, knowledge, skills, and abilities. The total compensation package for this position may also include other elements, including a sign-on bonus, restricted stock units, and discretionary awards in addition to a full range of medical, financial, and/or other benefits (including 401(k) eligibility and various paid time off benefits, such as vacation, sick time, and parental leave), dependent on the position offered. Details of participation in these benefit plans will be provided if an employee receives an offer of employment. If hired, employee will be in an “at-will position” and the Company reserves the right to modify base salary (as well as any other discretionary payment or compensation program) at any time, including for reasons related to individual performance, Company or individual department/team performance, and market factors.

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Division

Finance

Business Unit

Corporate

Location

USA

Site

East Hanover

Company / Legal Entity

U061 (FCRS = US002) Novartis Services, Inc.

Functional Area

Audit & Finance

Job Type

Full time

Employment Type

Regular

Shift Work

No

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