

# Manager of Tax Planning and M&A

Job ID  
REQ-10034682  
Dec 19, 2024  
USA

## Summary

The Manager, US M&A and Planning Integration is based in East Hanover, NJ. This person is responsible for developing and implementing the Novartis tax planning strategy. To ensure alignment with the overall business strategy, the Manager of M&A and Planning 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.

## About the Role

### Leading Tax

- Support the continuous development of a finance/accounting based tax organization with analytical orientation prepared for internal and external needs and challenges. Ensure close collaboration with business stakeholders locally and globally.
- 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.
- Manage Section 382 and other acquisition analysis.

- Provide tax technical advice to all US business units in close cooperation with the tax operations and transfer pricing teams, business units, finance organization and other key stakeholders.
- 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.
- Research, document, and take positions on reserves and other tax filing positions.
- 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.
- Monitor and relay updates to tax laws and regulations to relevant teams.

## People and Development

- Encourage an environment of collaboration and professional development, create a sense of empowerment, teamwork and ownership to elevate the US tax team to acknowledge center covering all US tax areas and pro-actively interconnected within US Tax and with US and global stakeholders (HQ Tax, Global FRA, M&A, finance, treasury, funds flow, BR, Development, commercial, legal, etc.)
- Act as a role model and mentor to the US Tax team members, embracing business partnering, knowledge sharing and technical excellence at the crossroads of tax, finance/accounting, and legal.
- Ensure training and development opportunities for team members and stakeholders.
- Active member of the global tax function driving the strategy, priorities, initiatives, and activities of the global tax function, in close collaboration with business and finance stakeholders.

## Education:

- Economics/Finance/Law/Accounting degree, with further accredited accounting and/or tax qualification (e.g. CPA, Tax Expert)

## Languages:

- English

## Capabilities:

- Minimum of 6+ years of US Tax experience in Big 4 and/or corporate department of a large publicly held multinational company
- Ability to influence stakeholders, effective communication, operational decision making, critical thinking, interpersonal skills, act towards accomplishment, embrace change and manage ambiguity

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**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 \$112,800 - \$183,300 / year; however, while salary ranges are effective from 1/1/25 through 12/31/25, 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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#### **Accessibility & Reasonable Accommodations**

The Novartis Group of Companies are committed to working with and providing reasonable accommodation to individuals with disabilities. If, because of a medical condition or disability, you need a reasonable accommodation for any part of the application process, or to perform the essential functions of a position, please send an e-mail to [us.reasonableaccommodations@novartis.com](mailto:us.reasonableaccommodations@novartis.com) or call +1(877)395-2339 and let us know the nature of your request and your contact information. Please include the job requisition number in your message.

Division

Finance

Business Unit

Corporate

Location  
USA  
State  
New Jersey  
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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