



CMA Ontario/Midwestern Ontario District

REGISTRATION FORM

Canadian Corporate and Personal Tax Update

In an ever changing business environment, we are committed to helping you keep up to date on significant tax changes impacting companies and individuals in Canada. Join us for our annual breakfast seminar where our experienced speakers from KPMG LLP and Manulife Financial will present an update of key tax topics that can help you plan and better manage corporate and personal taxation. The topics to be covered in this session include:

1.) How HST may impact your organization's 2010 financial budgets and capital expenditures

Ontario will be combining its PST with the federal GST to create a single, value-added sales tax that will be federally administered. The single sales tax rate of 13% (5% GST plus 8% PST) will take effect July 1, 2010. The single sales tax will generally use the same rules and tax base as the GST but with some exceptions. Though most Ontario industries will benefit, some may face an extra tax burden. Businesses will also need to adjust their accounting systems and operations to prepare for the change.

Jane Adams, as Associate Tax Partner with KPMG's Indirect Tax practice, will share insights into the effects of PST-GST harmonization and how it will impact Ontario businesses.

2.) Recent Court Cases and CRA Interpretations

Carol Foley, an AVP in Manulife's Tax and Estate Planning group, will discuss recent court cases and CRA Interpretations and their implications to tax and estate planning for corporations and their shareholders.

Moderator:

Joel Campagna, CMA, CFP – AVP, Tax & Estate Planning, Manulife Financial

Speakers:

Jane Adams, FCMA, - Indirect Tax Associate Partner, KPMG, LLP

Jane is an Associate Partner in the Waterloo office and leads the Southwestern Ontario Indirect Tax practice. With more than nineteen years experience in sales tax matters, Jane also plays a national lead resource role for payroll tax with an emphasis on Workplace Safety and Insurance matters. Jane was an integral member of the KPMG commodity tax group when GST was first introduced and assisted many businesses and organizations in preparing and implementing systems to be ready for the tax.

In addition to her 28 years experience in public practice, including a background in income tax, Jane has previously been a Director of Finance for a large hospital and is currently the healthcare and not-for-profit technical advisor for KPMG's National Indirect Tax practice. Jane offers innovative yet practical solutions for our clients.

Jane co-authored Carswell's GST Guide for Business; has been the tutorial leader for the CICA In-Residence GST "Essentials" Course for two years; and regularly speaks at various seminars, conferences and industry specific workshops.

Jane is a Certified Management Accountant and Fellow of the Society of Management Accountants, Past-chair of the Midwestern Ontario District for CMA Ontario and Chair of the Waterloo Region Catholic Community Foundation. Jane was formerly the Treasurer and member of the Board of Directors of the Employers' Advocacy Council and former Chair of the Greater Kitchener-Waterloo Chamber of Commerce Healthcare Subcommittee.

Carol Foley, B.B.A. LL.B., CA – AVP, Tax & Estate Planning, Manulife Financial

Carol Foley is a lawyer and Chartered Accountant with over 20 years of taxation and legal experience including personal and corporate tax, estate planning and international business development.

Carol joined Manulife in 2007, bringing a unique combination of accounting and legal expertise. Prior to joining Manulife, she worked for several years at a large trust company as a Senior Will & Estate Planner.

Carol is a member of the Canadian Tax Foundation and the Canadian Bar Association. She has spoken at seminars and conferences on tax and estate planning for the Ontario Bar Association, the LSUC, as well as several financial service organizations. She has led sessions for the Canadian Institute of Chartered Accountants In-Depth Tax Course and taught tax at the University of Toronto and the Institute of Chartered Accountants of Ontario's summer school. Carol has written several articles, newsletters and training videos.

Date:

Wednesday, March 3, 2010

Location:

Delta Kitchener
105 King Street East
Kitchener, ON N2G 2K8
519-744-4141

Time:

7:30 a.m. to 8:15 a.m. – Registration and Breakfast
8:15 a.m. to 10:30 a.m. – Presentations & Question Period

Menu:

Buffet including:
Bacon, Sausage, Ham, Eggs Benedict, Pancakes, Baked Croissants, Danishes, Muffins, Seasonal Fresh Fruit Platter
Coffee, Tea & Chilled Fruit Juices

Cost:

\$25.00 plus GST – Members
\$30.00 plus GST – Non-Members

CPLD:

2 credits

REGISTRATION FORM

Please fax or email your registration form to Leena Rosenberg, Tel :(416) 204-3140 or (800) 387-2991 ext 140,
Fax (416) 977-1365, lrosenberg@cma-ontario.org

Canadian Corporate and Personal Tax Update – Wednesday, March 3rd, 2010

Name: _____ Member #: _____

Tel: _____ Guest Name(s): _____

Credit Card (Visa/MasterCard): _____ Expiry Date: _____

Signature: _____ Dietary Restrictions: _____

No refunds for cancellations after February 24, 2010. Substitutions accepted at no charge.