



CMA Ontario/Toronto West District

REGISTRATION FORM

SR&ED Tax Credit Update - Recent Changes That Affect 2009 YE Filings -

Canada has always had one of the world's best R&D tax credit incentive programs. But there have been some significant changes that have come into affect for year-ends beginning in 2009.

First off, both the 2008 and 2009 federal and Ontario budgets contained legislative adjustments that significantly increase the maximum Scientific Research and Experimental Development (SR&ED) cash refund amount.

Then in mid-2008, CRA began implementing a series of subtle but significant changes in its administration of the SR&ED tax credit program. On the surface, these changes seem to have culminated in the release of a new T661 claim form. But before 2009 finishes, we may well see the most profound changes in the SR&ED program since the introduction of the 18 month filing deadline back in 1994.

In this 60-minute program our presenters will explore:

- Tax planning points to maximize SR&ED cash flow. New opportunities arising from the 2009 and 2009 budget changes.
- A tour through the new T661 claim form and how it will affect your next SR&ED claim.
- New form or new policy? Observed changes in the eligibility criteria.
- Compliance issues and strategies.
- Redress options. What to do when CRA says "No".

Speakers

David Hearn, CET

Managing Director, Scitax Advisory Partners LP

David has over 15 years experience in the field of SR&ED tax credits, prior to which he held engineering and R&D positions in the defence electronics industry. He serves on a joint CRA-practitioner committee on SR&ED scientific-technical issues.

Peter Weissman, CA, TEP

Partner Taxation, Cadesky and Associates LLP

In his 20 years as a tax specialist, Peter has worked extensively in the field of SR&ED tax credits – including a previous position as the leader of the SR&ED practice at a full-service accounting firm in which he was a partner. He has served on the Automotive Parts Manufacturers' Association's advisory committee on SR&ED incentives to CRA.

Date:

Thursday, January 28th, 2010

Location:

Red Rose Convention Centre
Champlain Room
1233 Derry Road East
Mississauga, ON L5T 1B6
905-565-6650
Enter at the rear of the building

Time:

5:30 p.m. to 6:30 p.m. – Registration and Networking
6:30 p.m. to 7:30 p.m. – Dinner
7:30 p.m. to 8:30 p.m. – Presentation

Meal:

Soup, Penne, Salad
Entrée is Grilled Chicken, Roasted Potatoes, Vegetable Medley, Apple Blossom
Dessert, Coffee, Tea
Vegetarian also available upon request

Cost:

\$45.00 plus GST – Members

\$55.00 plus GST – Non-members

CPLD:

3 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

SR&ED Tax Credit Update – Thursday, January 28th, 2010

Name: _____ Member #: _____

Tel: _____ Guest Name(s): _____

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

Signature: _____ Dietary Restrictions: _____

No refunds for cancellations after January 22nd, 2010. Substitutions accepted at no charge.