Member Network Registration Notice Breakfast Briefing - Toronto

TAX ALPHA
Tax Effective Investment Management
Cutting the Tax Bill with Corporate Class Investing

Introduction

The reality is that today's modern investment structures can save your clients thousands if not hundreds of thousands of dollars of tax in their non-registered and corporate accounts.

Consider how transforming fully taxable income into other forms of income (dividends, capital gains, return-of-capital or deferred gains) could benefit your clients.

Key Learning Outcomes

- Tax-Deferred investing for businesses
- Tax minimization strategies for High Net Individuals
- Convert interest income into capital gains (we can add dividends and ROC)
- Optimize the capital dividend and "eligible" dividends for tax-efficient family income planning
- Uses for Trusts and Holdcos
- Asset protection and intergenerational planning strategies
- Find out how we can help professional partnerships with their future capital loss situation

Who Should Attend

- Corporate controllers who are looking for ways to minimize taxes, reduce passive income, maximize the Capital Dividend Account or get RDTOH refunds.
- Advisors who work with High Net worth Individuals
- Advisors whose clients are concerned about how much tax they pay
- Members who would like to keep abreast of the ideas and structures coming out of the investment and insurance industries
- Advisors of clients who would prefer not to get year end distributions from their investments

About the Speakers

Guy J Anderson CFP, CIM, FMA, FCSI, MBA is an independent Financial Advisor specializing in tax minimization strategies for Individuals and CCPCs. He has been published in various newspapers and industry publications and is the co-author of a best selling investment book co-authored by Rob Carrick of the Globe and Mail.

Jason M. Pereira MBA CFP CSWP FCSI FMA is an independent Financial Advisor with 14 years of experience specializing in the Small to Medium Business market. He is a regular contributor to Advisor magazine and Advisor.ca

Date: Wednesday, December 15th, 2010

Location:

CMA Ontario – Microsoft Dynamics Business Lounge
(University Avenue/Wellington Avenue West)
70 University Avenue, Ground Floor
Toronto, ON M5J 2M4
416-977-7741

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Time:
7:30 a.m. to 8:00 a.m. – Registration/Networking/Continental Breakfast
8:00 a.m. to 9:00 a.m. - Presentation
9:00 a.m. to 9:15 a.m. – Q&A

Cost:
$35.00 plus HST – Members
$40.00 plus HST – Non-Members

REGISTRATION:
To register online please visit the CMA Ontario Member Portal at http://members.cma-ontario.org.

To register by email or fax please complete the form below and send to Leena Rosenberg at 416-977-1365 (fax) or lrosenberg@cmaontario.org

Guests (non-members) may register by email or fax by completing the form below and sending to Leena Rosenberg at 416-977-1365 (fax) or lrosenberg@cmaontario.org

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@cmaontario.org

TAX ALPHA – Wednesday, December 15th, 2010

Name: ______________________________ I am a Member: ☐ I am a guest (non-member): ☐

Member #:____________________________________ Tel: _______________________________

Credit Card (Visa/MasterCard):____________________________ Expiry Date: ______________________

Signature: ____________________________________ Dietary Restrictions: ______________________

No refunds for cancellations after December 14th, 2010. Substitutions accepted at no charge.

For a complete listing of District and Member Network events please visit www.cmaontario.org/events.

Visit www.myCMAcommunity.com to discuss the latest business trends and share insights and best practices in management accounting with fellow Certified Members and Candidates.

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