
Member Network Registration Notice Breakfast Briefing – K/W

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

Session Overview

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.

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Date: Thursday, February 24, 2011

Location:

Radisson Hotel Kitchener Waterloo – Elmira Meeting Room
2960 King Street East
Kitchener, ON N2A 1A9
519-894-9500

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 fax number at 416-977-1365 or membernetwork@cmaontario.org.

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

CPLD:

2 credits

REGISTRATION FORM

Please fax your registration form to 416-977-1365 or scan/email it to membernetwork@cmaontario.org.
General inquiries: 416-204-3140 or (800) 387-2991 ext. 140.

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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 February 17, 2011. 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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