

# RESUME WORLD INC, CA

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## CAREER PROFILE

A Experienced Chartered Accountant with over 15 years of expertise in the areas of **Business Review and Analysis, Tax Planning, Filings, Settlement Negotiation, Corporate Compliance, Project Management, Government Relationship Management and Submissions to the Canadian and U.S. Tax Authorities.** Proficient in the computation of corporate, partnership, trust and individual taxes, corporate reorganizations, surplus distributions, debt/equity financing tax issues, cross border issues, etc.

Proven ability to exercise professional judgment in dealing with disclosure of information in financial reporting of corporate and personal income taxes with a defensible approach to using the Canadian Income Tax Act and the U.S. Tax Regulations. Highly skilled in researching sources and identifying solutions or alternatives to tax issues.

A detail-oriented and resourceful individual with excellent communication and interpersonal skills, combined with an excellent understanding of complex tax issues.

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## AREAS OF PROFESSIONAL EXPERTISE

### ***Business Review and Analysis***

- Review and analyze tax issues, being mindful of key performance factors and short and long term business objectives
- Scrutinize financial reports and statements in order to identify opportunities and capitalize on savings through the advantageous use of tax planning
- Utilize computer modelling techniques to evaluate the outcomes of decisions
- Examine the policies established by public companies with respect to employee benefits, relocation, automobile expenses and accounting for scientific research and experimental development
- Establish audit trails for corporate tax provisions, review working papers prepared by audit staff, and coordinate and direct junior tax staff to ensure timely and accurate completion

### ***Tax Planning***

- Forecast tax issues and outline favourable plans to minimize taxes after identifying existing and potential tax issues such as tax loss utilization, scientific research and experimental development
- Facilitate business operations by preparing tax plans for the acquisition, divestiture, merger, expansion, and realignment of company operations
- Investigate complex issues such as setting up an immigration trust for an individual relocating to Canada, and considering the effect of the U.S. foreign holding company rules for an individual moving to the U.S.
- Provide expertise to chief executive officers, vice presidents, lawyers, controllers and treasurers while participating in high profile meetings to discuss company operations
- Perform tax due diligence reviews for mergers and acquisitions of companies involved in communications (newspapers, cable, broadcasting, and cellular communication), and bottling to ensure the adequacy of indemnity clauses and holdbacks from the purchase price
- Consider various tax issues of a corporation carrying on business in other jurisdictions
- Detailed understanding of federal and provincial capital tax including methods for reducing this tax with year end planning

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### **Tax Returns**

- Prepare corporate and personal tax returns for federal, Ontario, Quebec, Nova Scotia, and the Western Provinces
- Manage federal and provincial tax audits and prepare Notices of Objection
- Negotiate and secure positive outcomes from various federal and provincial tax authorities on behalf of clients
- Deal with various types of withholding tax issues involving customized software agreements, and royalty, interest and dividend payments
- Calculate corporate and individual tax installment payments
- Ensure timely completion of returns and any related elections, or designations
- Review issues involving the Canada-U.S. Income Tax Convention and other treaties

### **Staff & Project Management**

- Plan, organize and lead team members to complete special assignments; provide ongoing leadership, training and motivation to team members
- Manage and review projects to ensure accuracy and completeness
- Monitor work performance and prepare performance reviews for team members upon completion of projects as well as annual performance reviews

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### **SELECTED ACCOMPLISHMENTS**

- Obtained a \$500 million federal tax refund for a U.S. subsidiary company by identifying and pursuing a tax savings opportunity
- Secured \$108 million investment tax credits from Revenue Canada by preparing claims for scientific research for Communications, Mining, Electronics, Computer Software, Construction, Agriculture and Publishing companies
- Successfully planned and dealt with the income and capital taxes for various segments of a \$2 billion company acquisition with tax issues involving divestiture of some of the acquired operations and integrating the companies kept within the acquiring company's corporate structure
- Recognized by the Chairman and CEO for outstanding work performance and diligence with quarterly and annual bonuses on a regular basis
- Authored a policy manual for taxable benefits including tax issues relating to employee relocation, housing and automobile benefits
- Developed and maintained excellent client relationships with Fortune 500 companies resulting in repeat business and referrals
- Established a corporate-wide reputation of being proficient, engaging and thorough in staff training and project management

### **EMPLOYMENT**

PRIVATE PRACTICE, Toronto, Ontario 2007 – Present  
**Tax Advisor to publicly traded corporations**

LEADING ACCOUNTING FIRM, New York & Toronto 1990 - 2006  
**Senior Tax Advisor**

FORTUNE 500 ACCOUNTING FIRM, Delaware & Quebec 1985 - 1990  
**Staff Accountant/Auditor**

### **PROFESSIONAL LICENSES/ASSOCIATIONS**

CANADIAN TAX FOUNDATION, Toronto, Ontario 1990 - Present  
**Member**

CANADIAN INSTITUTE OF CHARTERED ACCOUNTANTS, Toronto, Ontario 1990  
**CA Designation**

### **PROFESSIONAL DEVELOPMENT**

CANADIAN IN-DEPTH TAX COURSE 1990 - 1992  
**Level One, Level Two**

### **EDUCATION**

UNIVERSITY OF TORONTO, Toronto, Ontario 1985  
**B.A. in Commerce**

### **COMPUTER SKILLS**

- Corporate and Individual Tax preparation programs
- Tax research databases
- Advanced Excel; Lotus Suite
- Ability to learn new computer applications quickly and independently

### **REFERENCES**

- Available upon request
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