

Business Advisory Solutions:

Business ambition made real

In the life of any business, landmark events take place that may change the business's course, threaten its survival, or determine its fortunes for decades to come. These events can happen at a time of your own choosing—or that of someone else's. A resilient business meets these strategic challenges armed with information, perspective, knowledge, connections, objectivity and resources. With a little help, you can turn a little luck into a great fortune.

“Trusted business advisor”

At SB Partners, we never take this statement for granted. The relationships we build with our clients are based on trust and understanding. Within that relationship, challenges can reveal elements in the business mix that are important to you.

SB Partners responds to the needs of large and small business owners who are driven by different personal aspirations, as well as those of professionals searching for smart, energetic synergy.



SB Partners' Experience

You want to navigate the process with confidence and stay in control at every stage. We ensure that your creative ideas make financial sense:

- Tax consultation and minimization – Canadian and American
- SRED Tax Credit (Scientific Research and Experimental Development Tax Credit)
- MORE™ Program – Manage Opportunities and Reduce Exposure. MORE™ is SB Partners' powerful, proprietary diagnostic program that identifies opportunities and risks and provides an Action Plan tailored to your business and personal circumstances.
- Mergers, takeovers and acquisitions
- Due diligence and transaction management
- Valuations of businesses, spin offs and joint ventures
- Valuations of intangible assets such as intellectual property, customer relationships, technology, trademarks and brand names
- Identification and implementation of “business value drivers”
- Strategic financial structures
- Effective business plans and financial forecasting
- Business succession planning
- New venture/project assessment and financial modeling
- Creating and managing organizational change
- Strategic planning and risk management
- Building key performance indicators
- Establish effective budgetary and cash flow processes
- Business process enhancement for efficiency, control and effectiveness

Facts That Make Sense—and Money—for You

SB Partners helps organizations—both for profit and not for profit—improve their performance. Whether you are experienced or not, large or small, we let you know where you are, help you decide where you want to go, and work out how to get there.

We are a full-service CA firm that provides innovative, cost-effective and practical professional service solutions to:

- Owner-managed businesses
- High-net-worth individuals who need strategic tax planning to achieve their current and long-term goals
- Canadian subsidiaries of multinational operations seeking local advice, especially as it relates to SRED tax credits, transfer pricing and Canadian tax

At the heart of what we deliver are practical, realistic solutions tailored to each individual client, supported by both technical expertise and local knowledge. We can give you what you need—facts that make sense and money for you.



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