

Tax Planning

There's an unavoidable path from the revenue you generate to the certainty of taxes. Somewhere on that path lies the opportunity to define your overall tax position, recognize your broader business goals, and implement strategies to minimize your taxation exposure.

SB Partners has substantial experience in working with individuals, corporations, partnerships, associations, and trusts to minimize their tax exposure and to provide practical solutions for common and uncommon taxation issues. It all starts with defining your needs.

If not managed astutely, the various taxes you face—business, municipal, provincial, federal and possibly international—have the potential to be major risk factors in the flow of your business. To be effective, tax strategies must work logically in the context of your whole business. That is why we advocate year-round tax management as an integral part of your key performance indicator tracking. You will be able to monitor your company's overall ongoing obligations and opportunities and we will help you to respond in a timely manner.



SB Partners offer a number of specific tax services for:

- > Business Owners & High Net Worth Individuals
 - > Corporations
 - > Partnerships
- Strategic tax planning opportunities
 - Corporate restructuring
 - Tax implications on Mergers & Acquisitions
 - Business exit strategy options
 - Estate & succession planning
 - Tax planning for regulated professionals
 - Use of family trusts
 - Advice on partnership deeds and agreements, goodwill and partnership entry and exit
 - Canada-U.S. cross border tax planning services
 - International tax advice – Inbound and outbound
 - Scientific Research & Experimental Development tax credits
 - Tax risk assessment
 - Managing tax issues in connection with loans to shareholders and related companies
 - Salary packaging to maximize take-home income
 - Employee-related tax advice

- Employee incentives and compensation
- Tax audit issues
- Advice to maximize tax credits and investment dividend income including foreign taxes
- Maximizing use of losses
- Maximizing credits and rebates
- Advice on incorporation
- Commodity tax planning (GST, HST, PST, QST)
- Tax compliance
- U.S. Tax Compliance
- Expatriate tax services

Your choice of taxation advisors is a critical business decision. It should be influenced by factors such as technical knowledge, accessibility to key advisors and networks, reputation among other professionals and regulatory bodies, and a history of providing practical advice that is technically correct and cost effective.

SB Partners' aim is to have their clients realize real value, and we achieve this through the effective interpretation of technicalities and the structuring of realistic tax plans that can be implemented.

Do you have taxation questions? We have the answers.

Contact: John Dow, Tax Partner

Direct Tel: 905-633-6335
Toll Free: 1-866-823-9990 x6335
Email: jdow@sbpartners.ca

Richard Rizzo, Senior Tax Manager

Direct Tel: 905-633-6332
Toll Free: 1-866-823-9990 x6332
Email: rrizzo@sbpartners.ca



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