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Corporate Tax and Estate Planning in the New Tax Era, Bruised and Battered, but not out!

Thursday, November 23, 2017
2:00 PM - 5:00 PM
Edward Hotel Markham

Overview

What was past and what does the future hold?

Tax Rollovers, Estate Freezes, Use of Trusts - what can you do?

The Family Business - past and future.

Topics Covered:

Income Sprinkling - the old and the new proposed tax regime
Capital Gains exemption - the old and the new proposed tax regime
Is an estate freeze still relevant?
What corporate tax planning can you consider?
What objectives will planning assist in?
How are rollovers affected?
What does it mean to clients thinking of setting up a Trust? for intergenerational transfers? for family tax planning?

Past, present and possible future

- Types of freezes and family tax planning

- Implications for rollovers and Trusts
- Are all Trusts affected?
- Different methods to implement the freeze
- How can Trusts now be used in Business and Estate Planning?

Using Trusts for Estate Planning

Asset Protection and Creditor Proofing Using Trusts

The Family Business

- Plan or Trap?
- Income splitting - Income sprinkling - what's left?
- Multiple capital gain deductions -intergenerational transfers, arm's length vs. non arm's length transactions and the difference between them.

Estate Planning

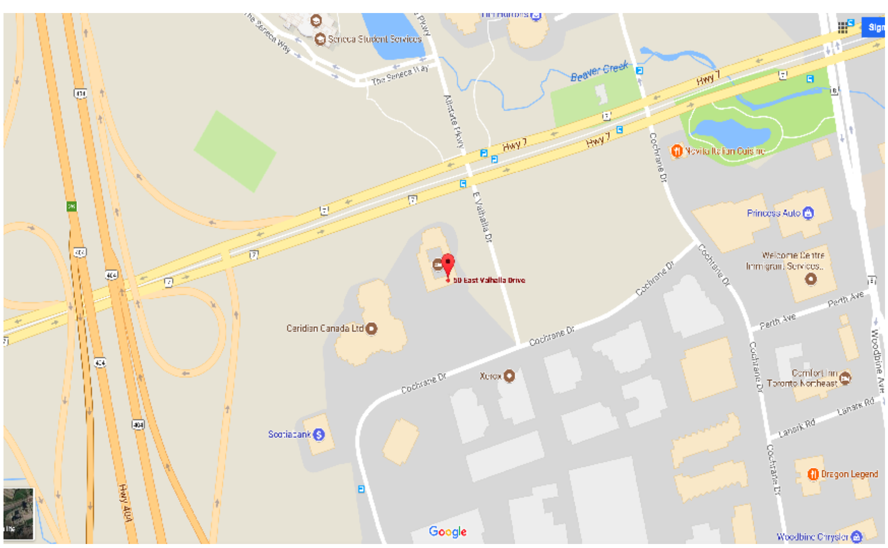
- Reduce taxes on death -death of the "pipeline"? what to do?

Passive income - kicked down the road?

Location

Edward Hotel Markham

50 East Valhalla Drive | Markham | ON | L3R 0A3



Speakers

Brett Starkman, CPA, CA

Schwartz Levitsky Feldman LLP

Brett is the senior tax partner with SLF LLP in charge of the firm's regional and International tax services practice based in Toronto. With more than 30 years of experience, he specializes in corporate International and Domestic tax planning and structuring, estate planning, and mergers and acquisitions for clients in various industries such as professional services, real estate, manufacturing, retail and information technology. Brett has written numerous articles and has been a guest speaker at both International and Domestic seminars. He has also been interviewed on both radio and television.

Steven Blau

Lawyer at Thompson Dymond

Steven is a tax lawyer at Thompson Dymond. Prior to joining the said firm, he was a Tax Partner at Deloitte, LLP. Steven has been practicing taxation for over 30 years, advising primarily Canadian based private companies and individuals on a wide variety of tax issues. He has helped private companies and their owners succeed through different economic cycles and in the new borderless environment.

His practice also focuses on advising high net worth individuals and families, business owners, and professionals on comprehensive tax planning ideas and strategies, including business divestiture planning and estate and business succession planning. He has designed and implemented numerous comprehensive estate and business succession strategies using a flexible "building-block" approach that can be modified to suit the client's changing circumstances which facilitates an orderly transfer of leadership and ownership of a business.

Steven obtained his common and civil law degrees from McGill University. He has authored numerous articles on tax matters for such publications as CA Magazine, Canadian Lawyer, International Tax Alert, The National Post, The Montreal Gazette and has spoken at numerous tax forums.