

U.S. TAX BASICS FOR CANADIAN CPAs

C/A PROFESSIONAL SEMINARS INC.

Program Outline

Program	U.S. Tax Basics for Canadian CPAs	
Format	<ul style="list-style-type: none">• Classroom format, detailed notes and references.• 1 day (8 hours)• Limited to 60 people	
Who Should Attend	Persons wanting a solid basic knowledge of U.S. tax relevant to Canadian clients	
Key Learning Objectives	<ul style="list-style-type: none">• Basic functional overview of relevant U.S. tax issues.• Ability to identify and discuss U.S. tax issues with confidence.• Understand U.S. tax filing requirements	
Cost	Regular rate	\$750 + HST
	Discount *	\$150
	Discounted Rate	\$600 + HST
	Includes breakfast, lunch, and course materials *if you or any member of your firm attends our Tax Seminar Series or any of our other courses	
Location	Edward Hotel 185 Yorkland Blvd North York M2J 4R2	
Date	Wednesday, December 4, 2019	

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A. Framework of U.S. Tax System

- Overview of U.S. personal tax system, tax rates, filings and extensions, key differences from Canadian concepts
- U.S. corporate tax, tax rates, filings and extensions, common issues
- U.S. estate and gift tax, calculation, tax rates
- U.S. LLC's, how they are treated
- Trusts for U.S. persons, types of trusts and taxation of income
- State and local tax issues
- Claiming treaty benefits

B. Issues for Canadians

- Taxation of Canadian individuals on U.S. employment, business income, rental income, and capital gains. Filings, tax withholding, extensions and other issues
- Income from U.S. LLC's and U.S. corporations, and tax planning strategies
- U.S. estate tax issues for Canadians, owning a U.S. vacation property
- Strategies for setting up a U.S. business, form of entity and ownership

C. Common Cross-Border Issues

- Canadians with U.S. Beneficiaries, effective structures to pass on wealth
- Moving to the U.S., tax planning opportunities and obstacles

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REGISTRATION FORM

Date: Wednesday, December 4, 2019

Time: 8:30 AM to 5:00 PM (Breakfast served at 8:00 AM)

Venue: Edward Hotel
185 Yorkland Blvd
North York
M2J 4R2

NAME(S): _____

FIRM NAME: _____

TELEPHONE: _____

E-MAIL ADDRESS(ES): _____

Please return this form as soon as possible by e-mail or fax. Please note that space is limited to 60 people.

E-mail: seminars@cadesky.com

Fax: (416) 498 – 9501

Fee: \$750 + HST per person
\$150 discount if you or any member of your firm attends our Tax Breakfast Series.
Fee includes breakfast, lunch and course materials

Payable to: C/A PROFESSIONAL SEMINARS INC.

Mail cheque to: Cadesky Tax, 2225 Sheppard Avenue East, Suite 1001, Toronto, Ontario M2J 5C2

	Number of Attendee(s)		
Regular Registration Fee	<input type="text"/>	x \$750.00	\$ _____
Discounted Rate* (\$750 - \$150)	<input type="text"/>	x \$600.00	\$ _____
HST Registration #89208 0474RT HST (13%)			\$ _____
TOTAL			\$ _____

Questions can be addressed to Sherry Collins (scollins@cadesky.com) or Terri Wood (twood@cadesky.com) or by calling 416-498-9500.

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Terms and Conditions of Registration

We reserve the right to change topics, speakers and content at our discretion, primarily due to legislative changes beyond our control. We accept no liability for cancellation of sessions beyond a refund of the attendance fee applicable.

A seminar may be cancelled due to circumstances beyond our control (e.g. snow storm). If so, it may be rescheduled for the next suitable date.

We accept no liability resulting from reliance upon or use of our seminar materials or information by attendees or anyone else under any circumstances however caused.

We accept no liability for any accident or mishap however caused. Parking lots, walkways and floors can be slippery especially in winter like conditions. Please use suitable caution at all times. We cannot be responsible for lost or stolen property. Please keep valuable items with you.

Audio or video recording is not permitted.

The seminar series is designed for accountants who work in the accounting field and are not tax specialists. Attendance is by invitation only. We reserve the right to deny registration for whatever reason, and/or refuse admission upon refund of the attendance fee.

You will be sent a calendar reminder for the days you are registered.

For security reasons, we ask that you wear a name tag while at the seminar.

Parking is free.

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You are not registered until the Registration Fee is paid. We cannot hold space for you and our sessions often fill to capacity.

Edward Hotel North York

Address: 185 Yorkland Blvd, Toronto ON M2J 4R2

Phone: 416-493-9000

