



Tax Services Top 10 Services

The Tax Services group at Fuller Landau differentiates itself in their client approach. Tax planning isn't simply a matter of filling out forms, though we do compliance work as well. True value-added tax services and tax planning require personal involvement with our clients. We ensure that all of our clients are given ample time with our team so that we can learn about who they are, what their business is, and strategize according to their situation. Every client is unique.

Our tax team is well-versed in Canadian tax laws. Through our international network, the Leading Edge Alliance (LEA), we are able to provide tax planning and compliance services for international business. The members of the LEA are more than just referral firms; they are colleagues in firms across the world that meet at least twice per year.

Top 10 Tax Services offered by Fuller Landau

Personal and Corporate Tax: Filing personal income tax returns for business owners and self-employed individuals can be more complex than for the average person. Our team works with the client to determine the most appropriate tax strategies for their corporate and personal tax situation. We review the possible deductions that may be taken advantage of, and how to maximize tax credits where applicable.

Corporate Reorganizations: Undertaking a corporate reorganization, be it for business growth, succession planning, retirement planning, creditor proofing, mergers and acquisitions, or share capital restructuring, requires careful attention to details, a clear understanding of the corporation's and shareholders' needs, and in-depth knowledge of tax laws and regulations in various jurisdictions. Our service group helps business owners achieve tax optimization through the development of an effective corporate and personal tax plan.

Commodity and Sales Tax Planning: Regardless of their industry, our tax services group ensures that our clients are complying with federal and provincial sales tax laws. We offer support, guidance and assist in sales tax recovery plans for both for-profit and not-for-profit entities.

Scientific Research and Experimental Development (SR&ED) Tax Credits: Our team identifies opportunities that allow our clients to maximize their research and development tax credits that can, in turn be refunded and applied against corporate income taxes or provide needed financial capital. Our team will manage the entire SR&ED claim process for your company, starting with an assessment.

Assistance with Tax Audits – Preparation and Negotiation: During the stressful period of a government audit, we offer support, guidance and representation for our clients. Our team assists clients in organizing their files in preparation for the audit, and then assists the auditors in understanding the client's business and its processes. The objective of our role always being to reduce anxiety and increase understanding of all parties involved.

International Tax Consulting – Inbound and Outbound: As active members of the LEA, we are able to provide both inbound and outbound tax consulting for international businesses. Through this association, Fuller Landau is able to assist businesses looking to expand across borders to structure their organization in a manner that minimizes both their domestic and international tax burden.

Estate Planning and Trusts: Our goal is financial management, protection, growth and transition of family wealth. We assist and guide individuals in making decisions about their accumulated wealth, how to strategically protect it, and even transfer it to the next generation. Trusts are effective tax planning tools used to achieve this objective in addition to charitable giving strategies or even a corporate reorganization to transfer future business growth to the next generation.

Real-Estate Tax for Non-Residents: The real estate tax services group assists non-resident buyers in complying with the tax laws regulating non-resident property purchases. Each client's unique financial picture, needs, and history are taken into account and used to develop a personalized real estate tax strategy.

Transfer Pricing: International entities need to make decisions regarding the price of goods sold within the corporate group. Our service group assists our clients in the preparation and documentation of transfer pricing methodology to comply with national requirements, and we provide support in dispute resolution.

Cross-Border Personal Income Tax Services: Immigrating or emigrating to and from Canada creates extensive complexities and potential tax ramifications. As well, owning property in a foreign jurisdiction has tax implications that most do not think of when purchasing a residential or commercial property in another country. Our cross-border practitioners not only consult in these areas, but assist in the annual filings of Canadian and US personal income tax returns, where applicable.



Suite 200, Place du Canada
1010 De La Gauchetière Street West
Montreal, Quebec, Canada H3B 2N2
T 514 875 2865 F 514 866 0247
E info@flmontreal.com W www.flmontreal.com



leading edge alliance
Membre du réseau mondial
leadingedgealliance.com



Tax Services Statistics

THE TEAM

Eight Tax Service Specialists covering a broad range of tax services.

Second **largest service** area in the firm.

Often called upon by major Montreal media to **act as experts on tax issues**.

THE CLIENTS

Our client base is made up of **our firm's clients** as well as a selected clientele of our international affiliate, **the LEA**; we offer seamless services for international clients doing business in Canada.

We assist in the growth of our clientele; the **small client** of today is the **big client** of tomorrow.



Henry J. Grzes, Tax Director, SS&G:

As a regional accounting firm based in the United States, we rely on the strong relationship built through the LEA with the Fuller Landau Tax Services team to assist us with clients looking to do business north of the border. Whether it is a client looking to establish a Canadian subsidiary or simply registering a Canadian business, having the local support has proved to be an invaluable asset.



Claude Vincent, Owner, CV Logistics:

Fuller Landau has helped me with my tax planning for over 10 years now. On their recommendation, I was able to set up both an operating and holding company that has benefited both my business and my estate. We are in the process of transitioning the business from me to my son, and once again, Fuller Landau's tax team has set us on the right course.



Suite 200, Place du Canada
1010 De La Gauchetiere Street West
Montreal, Quebec, Canada H3B 2N2
T 514 875 2865 F 514 866 0247
E info@flmontreal.com W www.flmontreal.com



Membre du réseau mondial
leadingedgealliance.com