



**POST-FEBRUARY 27, 2018 BUDGET ANALYSIS AND ACTION STRATEGIES
Canada-U.S. Tax Reform Analysis**

With Evelyn Jacks, President, Knowledge Bureau and Special Guest Experts

EARLY DEADLINE (WITH ANY TUITION FEE REDUCTIONS): MAY 15, 2018

FINAL ENROLMENT DEADLINE (REGULAR TUITION FEES): MAY 25, 2018

These fast-paced and comprehensive workshops are designed for the busy tax and financial professional to provide the most recent advanced updates from CRA, Finance Canada, Statistics Canada and the IRS featuring noted speakers, writers and Master Instructors from Knowledge Bureau.

WHO SHOULD ATTEND: This Advanced Tax Update detail from the most recent Canadian Federal Budget (February 27, 2018) and the U.S. Tax Reforms. Tax and financial advisors working with high net worth clients, including executives, professionals and family business owners should be in attendance. The workshop, which is tax deductible and includes accreditation for 10 CE/CPD Credits from various accreditors including Insurance Councils, covers the new rules and anticipated changes to compliance and tax audit procedures for 2018 and beyond. In particular, implications of tax change for family income splitting, taxation of passive income in private corporations and investors with assets in Canada, U.S. and abroad will be covered. Advisors will learn how to maximize relationships with CRA and the IRS and participate in peer-to-peer discussions about the implications of change.

WHY IS THIS TIMELY? A new element of tax risk and uncertainty has been introduced by Finance Canada over the past year. Now being legislated, controversial tax reforms on both sides of the boarder will impact Canadian investors and retirees more significantly than ever before. Be better informed to answer questions about the tax changes, and from a client point of view, what tax planning strategies and documentation will be required to manage family financial efforts. Meet your best interest duties and increase your value proposition with deep and broad knowledge of the issues.

DATES, VENUES AND CONFIRMED SPEAKERS; AGENDA FOLLOWS:

MAY 29	WINNIPEG	Canad Inn Polo Park Room: Ambassador K, Free Parking	Evelyn Jacks, MFA, DFA-Tax Services Specialist, President, Knowledge Bureau Dean Smith, PHD, CFP, TEP, CPA, CA, Partner, Cadesky and Associates LLP and the President of Cadesky U.S. Tax Ltd.
MAY 30	CALGARY	Clarion Conference Centre Room: Selkirk Rm, Free Parking	As above
MAY 31	VANCOUVER	Sandman City Centre Room: Salon 1 & 2, Paid Parking across street	As above
JUNE 6	TORONTO	Pearson Conv Centre Room: Hall F, Free Parking	Evelyn Jacks, MFA, DFA-Tax Services Specialist, President, Knowledge Bureau Russell Vert, CPA CA, CPA (Maryland), Senior U.S. Tax Manager, U.S. Tax Ltd.

AGENDA: ADVANCED 2018 POST-BUDGET ANALYSIS

Note: We are currently planning our cutting-edge agenda. Come back often for more information.

7:30 AM – 8:30 AM	KNOWLEDGE BUREAU INSTRUCTOR AND ADVISORY BOARD MEETING
8:00 – 8:30 AM	REGISTRATION AND COFFEE: Pick up your Comprehensive Knowledge Journal
<p>8:30 - 10:30 AM</p> <p><u>Evelyn Jacks</u> President Knowledge Bureau MFA, DFA-Tax Services Specialist</p>	<p>WHAT'S NEW: AFTER THE FEBRUARY 27, 2018 FEDERAL BUDGET At Department of Finance:</p> <ul style="list-style-type: none"> • Overview: Personal Tax Changes for 2017/2018 • Demographic and Gender-based issues • Update on proposed changes to small business corporations • Anticipated change to the 2018 return
10:30 - 10:45 AM	NETWORKING BREAK
11:00 – 12:00 AM	<p>AUDIT ISSUES AT CRA: APPROACHING YOUR CONFIDENT RELATIONSHIP</p> <ul style="list-style-type: none"> • Tax Audit Season: 2007 – 2017 • The Adjustment and Appeals Process <p>AUDIT-PROOFING WITH INDIVIDUALS: FOCUS ON INCOME AND DEDUCTIONS:</p> <ul style="list-style-type: none"> • Families: Maximizing child care claims, Canada Child Benefits • Employees: Deductions for out-of-pocket expenses • Students: Understanding the new Canada Worker's Benefit • Investors: Staying Clear of RRSP Excess Contributions, TFSA Returns • Retirees: Pension income splitting and instalment optimization • The Disabled: Canada Caregiver and Disability Claims • Gift Planning: Making donations count
12:00 – 12:30 PM	<p>FOCUS ON REAL ESTATE</p> <ul style="list-style-type: none"> • Ownership – Personal Residences and Rental Properties <ul style="list-style-type: none"> ○ One property; more than one property, on Canada, abroad, T1135 ○ Estate Planning: Preparing executors for change – principal residence and other dispositions • Change of Use <ul style="list-style-type: none"> ○ Personal to rental: First Year Reporting Issues ○ Personal to business: what's different? • Dispositions <ul style="list-style-type: none"> ○ Adventure or concern in nature of trade: when are investments/real estate considered to be business income?
12:30 -1:00 PM	NETWORKING LUNCH
1:00 – 1:30 PM	ROUND TABLE DISCUSSION HOSTED BY OUR GUEST PARTNERS

<p style="text-align: center;">1:30 – 2:45 PM</p> <p>Dean Smith, a partner in Cadesky Tax (Cadesky and Associates LLP) and the President of Cadesky U.S. Tax Limited.</p> <p style="text-align: center;">In Toronto:</p> <p>Russell Vert, Senior Tax Manager, Cadesky U.S. Tax Ltd.</p>	<p>CANADIANS ABROAD: News for Investors, Snowbirds, Professionals, Business Owners & New Romances</p> <ol style="list-style-type: none"> 1) What was the objective of U.S. tax reform? Effect of reforms on residency rules and filing requirements 2) What changes will impact Canadians investing in the U.S. and U.S. citizens living in Canada? 3) Personal tax: How will the rules affect Canadian residents who have children studying in Canada, snowbirds, retirees, rental and personal property owners in the U.S. 4) Family tax: What is the effect of change for Canadians who marry U. S. citizens? 5) Tax tips for Expats and U.S. residents/citizens living in Canada <p>If these are questions that keep you and your clients up at night, don't miss this dynamic session from one of Canada's most experienced U.S.-Canada tax experts.</p>
<p style="text-align: center;">2:45 – 3:00 PM</p>	<p style="text-align: center;">NETWORKING BREAK</p>
<p style="text-align: center;">3:00 – 4:00 PM</p>	<ol style="list-style-type: none"> 6) Property owners: Is it still a good idea to own property in the U.S.? 7) Corporate tax: In particular, what will the changes to the U.S. subpart F rules mean for planning for Canadian private companies? Learn about the expansion of the definition of a "United States shareholder" and new deemed income inclusions. 8) Tips on planning with professionals, Canadians who own U.S. shares 9) The Bottom line in investments, retirement and estate planning for individuals, professionals and private business owners.
<p style="text-align: center;">4:00 – 4:30</p>	<p>THE SUMMIT – PEER-TO-PEER DISCUSSION, YOUR Q & A</p> <p>Is the Canadian competitive advantage gone – are companies leaving and their employees leaving – and what are the departure tax implications? How will high net worth clients, executives and professionals respond to the changes in Canada and the US? What about private corporation owners? How will you respond to the planning and audit-defence opportunities with your clients? How will your practice change? How do you best train your staff and increase your capacity for working with concerned clients. You'll find stimulating answers to these questions and deep perspectives from our guest experts and your peers in this inter-active session.</p>
<p style="text-align: center;">4:30 PM</p>	<p>Closing Remarks and Certification</p> <p>Verifiable Credits – 6.5 Non-Verifiable Credits – 3.5 = Total 10 CE/CPD Credits</p>

PRE-READING IN EVERGREEN EXPLANATORY NOTES: TBA