

BIOGRAPHICAL INFORMATION FOR PRE-PROMOTION AND INTRODUCTION:



Dean T. Smith

Dean Smith, PHD, CFP, TEP, CPA, CA is a partner with Cadesky and Associates LLP and the President of Cadesky U.S. Tax Ltd. Cadesky is a boutique accounting firm which provides only taxation services. Dean has been involved with expatriate tax work for over 23 years assisting companies moving employees around the world. Clients also include private individuals who have multiple jurisdictional filings. Dean is also an instructor and writer with Knowledge Bureau.

CAREER HIGHLIGHTS:

- Graduate Certificate in Estate Planning (U.S.) – Golden Gate University, San Francisco (2005)
- Ph.D. (in Financial Accounting), University of Waterloo, Waterloo, ON Canada (1999)
- Honours, B Comm. – McMaster University, Hamilton, ON Canada (1987)

NOTEWORTHY ENGAGEMENTS

- President – British Canadian Chamber of Trade and Commerce (BCCTC)
- Past Chair Tax Committee - American Chamber of Commerce in Canada (Amcham)
- Member - Society and Trust and Estate Practitioners, Toronto
- Chartered Professional Accountant – CPA Ontario
- Chartered Professional Accountant – CPA Manitoba
- Certified Public Accountant – Illinois
- Certified Financial Planner – Financial Planners Standards Council

AREAS OF PRACTICE:

- Practice Leader - US-Cross Border Tax Services
 - High net worth individuals with cross border needs
 - Acceptance agent for IRS, can assist clients with obtaining U.S. Individual Taxpayer Identification Numbers (ITINs)
 - Assistance with the implementation of Retirement Compensation Arrangements (RCA) and Immigrant Trusts
 - Use of trusts in tax and estate planning.
- Cross-border personal tax – Canada, U.S. and U.K.
- Cross-border estate tax planning and compliance - U.S. estates and trusts