CIAA Annual Tax Seminar 2019

MARCH 26, 2019

St. Andrew's Centre | Toronto

Presented by

8:30 am - 9:00 am | Registration & Breakfast
9:00 am - 11:30 am | Seminar

Member Rate - $140* | Non-Member Rate - $190*
*All tickets are taxable at 13%

St. Andrew's Conference Centre
27th Floor (Hall & Lounge)
150 King Street West, Toronto

TO BE DISCUSSED

- Tax impacts of IFRS 17
- Indirect tax update including CRA audit activity regarding GST/HST and sales taxes
- Reinsurance and transfer pricing including new OECD draft guidance on financial transactions and CRA audit activity
- A potpourri of relevant tax updates including March 19th federal budget

SEMINAR SPEAKERS

ERDEM ERINC - Tax Partner, PwC

Erdem is a Tax partner in PwC's financial services group and is the leader of the firm's Canadian insurance tax practice. He specializes in providing Canadian income tax advice for Canadian based and foreign insurance clients. He also has extensive experience with tax due diligence and tax structuring/financing projects including leading complex reorganizations and transition assignments both in Canada and internationally.

Erdem offers a unique skillset of both technical knowledge of the Canadian insurance industry as well as the ability to lead complex M&A projects. Erdem has advised on various types of acquisition planning, implementation, and integration transactions. Erdem has worked on assignments involving both inbound and outbound projects, cross-border financing, and complex tax planning including tax modeling, loss consolidation planning, spin-offs, “butterflies”, and “bump” transactions. He has helped his insurance clients plan and implement entity rationalization projects – helping ensure that business objectives were achieved and tax efficiencies optimized.

Erdem’s strong technical background and keen eye for value-added solutions are both practical in nature and non-disruptive to the business.

JASON SWALES - Partner, PwC

Jason is a Partner in PwC's Toronto office and is the Tax Financial Services Leader. He specializes in providing Canadian income tax advice for Canadian based and foreign clients in the Financial Services industry, including domestic and multi-national insurance companies.

Jason has over 20 years' experience advising clients on Canadian and international tax matters, including mergers, acquisitions, and restructuring. He is the co-author of a book published by LexisNexis entitled “Canadian Insurance Taxation”.

Jason graduated with a degree in Commerce and Economics in 1991 and earned his LLB in 1995. He was called to the Ontario bar in 1997 and is a member of the Law Society of Upper Canada and the Canadian Bar Association. Jason originally joined PwC in 1997.

Canadian Insurance Accountants
CIAA
ASSOCIATION

CIAA Annual Tax Seminar 2019

MARCH 26, 2019

St. Andrew's Centre | Toronto

Presented by

pwc

8:30 am - 9:00 am | Registration & Breakfast
9:00 am - 11:30 am | Seminar

Member Rate - $140* | Non-Member Rate - $190*
*All tickets are taxable at 13%

St. Andrew's Conference Centre
27th Floor (Hall & Lounge)
150 King Street West, Toronto

TO BE DISCUSSED

- Tax impacts of IFRS 17
- Indirect tax update including CRA audit activity regarding GST/HST and sales taxes
- Reinsurance and transfer pricing including new OECD draft guidance on financial transactions and CRA audit activity
- A potpourri of relevant tax updates including March 19th federal budget

SEMINAR SPEAKERS

EMMA PURDY - Partner, PwC

Emma is a financial services tax and transfer pricing partner that leads PwC's global tax relationship on a number of Canadian multinational financial services clients in the banking and insurance industries to bring the strength of the firm and its global network to resolve their tax and business issues. She has advised clients on the tax and operational aspects of Captive Insurance and reinsurance transactions.

Prior to joining PwC, Emma consulted for a Canadian insurance company and a US bank addressing tax planning, documentation and audit defense issues. Her experience also includes three years as an International Tax Auditor with the Canada Revenue Agency.

Emma is a CPA with a BA Honours in Economics and Business Administration from the University of Toronto and has appeared in the International Tax Review's World's Leading Transfer Pricing Advisers since 1999 and has been recognized in the Best of the Best 2014 and 2016 Expert Guides as one of the top 30 transfer pricing advisers in the world.

BRENT MURRAY, LLB, PwC

Brent obtained his LL.B from the University of British Columbia in 1996 and was called to the Ontario Bar in 1998. Brent is a partner in PricewaterhouseCoopers LLP and PwC Law LLP – an independent tax law firm affiliated with PricewaterhouseCoopers LLP.

Since being called to the Bar, Brent's practise has focused exclusively on commodity tax and related matters including goods and services tax (GST), harmonized sales tax (HST), and provincial sales tax (PST). Brent also has extensive experience in dealing with various taxation authorities in resolving tax disputes and has represented clients at the Federal Court and the Tax Court of Canada.

Brent has authored numerous articles and papers on commodity tax matters including conference papers for the CPA's Commodity Tax Symposium, the Canadian Tax Foundation, the Ontario Bar Association, the Canadian Bar Association, the Tax Executives Institute and CCH Webinars. Brent has been a co-instructor at the CPA's In-Depth GST Course and is a regular contributor to CCH's GST Monitor.

Canadian Insurance Accountants
CIAA
ASSOCIATION