

March 8, 2022

Advanced Tax Issues and Strategies for Family Lawyers



CHAIR: **Steve Ranot**, CPA, CA-IFA, CBV, *Marmar Penner Inc.*

May 31, 2022

9:00 a.m. to 12:30 p.m.

Total CPD Hours = 3 h Substantive + 30 m Professionalism ^P

Law Society of Ontario

SKU CLE22-0051100


Agenda

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| 9:00 a.m. – 9:05 a.m. | Welcome

Steve Ranot, CPA, CA-IFA, CBV, <i>Marmar Penner Inc.</i> |
| 9:05 a.m. – 9:47 a.m. | Income Tax and Income Determination

Anna Barrett, CA, CBV, CFF, <i>Marmar Penner Inc.</i>

David Frenkel, <i>Frenkel Tobin LLP</i> |
| 9:47 a.m. – 9:52 a.m. | Question and Answer Session |

- 9:52 a.m. – 10:34 a.m.** **Dealing with Financial Disclosure and Unreported Income**
(30 m )
- Vivian Alterman, MBA, CPA, CA, CBV, *ap Valuations Limited*
- Andrew Chris, *Normandin Chris LLP*
- 10:34 a.m. – 10:39 a.m.** **Question and Answer Session**
- 10:39 a.m. – 10:54 a.m.** **Coffee Break**
- 10:54 a.m. – 11:36 a.m.** **Post-Separation Credits and Deductions**
- Kavita Bhagat, C.S., *Kavita V Bhagat Professional Corporation*
- Alexandra (Ali) Spinner, BA, MMPA, CPA, CA, TEP, *Crowe Soberman LLP*
- 11:36 a.m. – 11:41 a.m.** **Question and Answer Session**
- 11:41 a.m. – 12:23 p.m.** **Income Tax Considerations when Settling a File**
- Maneesha Mehra, C.S., *Goldhart & Associates*
- Steve Ranot, CPA, CA-IFA, CBV, *Marmer Penner Inc.*
- 12:23 p.m. – 12:30 p.m.** **Question and Answer Session**
- 12:30 p.m.** **Program Ends**