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PROFESSIONAL DEVELOPMENT EVENT



Brian Wurts

Financial Planning Webinar Series

HST & Tax Planning for Occupational Therapists

Presented by:

Brian Wurts HST/GST Consultant

May 24, 2017

12:00 pm - 1:00 pm

Professional Corporations & Tax-Efficient Strategies for Healthcare Providers

Presented by:

Françoise Helou, B.Eng., MBA, CFA

May 31, 2017

12:00 pm - 1:00 pm

Registration fees:

Complimentary

for OSOT Members

\$25 (+HST) for Non-Members



François Helou

Join Brian Wurts on May 24, 2017 as he engages participants in:

- *GST/HST system and how the healthcare profession fits into this framework, covering issues such as;*
 - Understanding when HST applies to the provision of OT services
 - When are you required to register for GST? HST?
 - **Can it be beneficial to register even if not required?**
 - **Can you claim any refunds of GST/HST that you have paid on inputs**
 - **What happens if you sell a business or a practice?**
 - **What revenue streams are subject to GST/HST?**
- *Learn how to assess the impact of various forms of taxation*
- *Gain a good understanding of HST and how it applies to business or practice*

[REGISTER NOW!](#) for May 24th

Join François Helou on May 31, 2017 as he engages participants in:

- Understanding the components involved in starting or owning a business
- Establish what it means to professionally incorporate a business
 - What's involved in incorporating?
 - How do you set up a Professional Corporation
 - What are the College of Occupational Therapists of Ontario's requirements?
 - What are the advantages & other considerations of professionally incorporating?
 - Employee vs. independent contractor - where a PC applies
- Discuss the tax benefits of owning your own business and incorporating
- Income distribution and living benefit strategies with a PC
- Clarify the components of estate planning when owning a business

[REGISTER NOW!](#) for May 31st

Target Audience:

Occupational therapists who currently own or are interested in starting their own business.

About our Presenters:

Brian Wurts is the founder of HST Consulting, Inc. He is recognized as a leader in GST/HST treatment of financial services, particularly with regard to the application of the new rules for pension plans and mutual funds, and other selected listed financial institutions (SLFIs). Brian was a senior manager in the Indirect Tax Group of Pricewaterhouse Coopers in Toronto from 2000 to 2012. While at Pricewaterhouse Coopers, he provided consulting services to clients in a wide range of industries, including electricity, import-export, real estate, and e-commerce tourism.

François Helou has held senior positions and led capital market groups at Canadian financial institutions for 25 years. He works closely with institutional and corporate clients to establish risk management and investment solutions involving fixed income, equity, foreign exchange, and commodity. He also spearheaded the design and launch of various investment products in Canada. He hosted financial seminars and educational workshops for investors across Canada. François holds an engineering degree from L'Université Laval, an MBA from McGill University and the Chartered Financial Analyst (CFA) designation.

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**Refund Policy: Refunds will be given on live webinar registrations provided that a request is received by the Ontario Society of Occupational Therapists no later than 7 calendar days prior to the event. Refunds will be given in full less a \$10.00 administrative charge. No refunds will be given on archived webinars.*

**Please contact the [OSOT Office](#) to register as a group or with any questions.*

We hope you enjoy this programming!



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