INALD TAX ADVISORY INC.

As a tax specialist and trained facilitator, **Shelagh Rinald, FCPA, FCA, CFP, TEP**, is able to provide a full range of corporate and personal tax advisory services to her clients. The range and scope of Shelagh's professional capabilities include…

Work Experience:

- President Rinald Tax Advisory (2008-current)
- Grant Thornton LLP, Tax Partner (2002-2008)
- Grant Thornton LLP, Leader National Succession and Estate Planning Team (2004-2008)
- KPMG, Vancouver and Victoria Tax Groups (1990-2002)

Professional Designations:

- Fellow of the Institute of Chartered Accountants (FCA), 2015
- Trust and Estate Practitioner (TEP), 2002
- Certified Financial Planner (CFP), 1998
- Chartered Accountant (CA), 1989
- Bachelor of Commerce (Honours), University of British Columbia, 1986
- Canadian Securities Course (Honours), 1984

- expertise to provide comprehensive and innovative solutions for your corporate tax planning needs including planning for the reorganization of corporate shareholdings and groups, planning for overall corporate tax minimization, structuring tax efficient management compensation strategies, planning for the succession of your business and helping maximize the return from the sale of your business.
- expertise, as a Certified CAFE Family Council Facilitator, to facilitate family business meetings, assist with the development of family shareholder agreements and strategic plans and plan any corporate reorganization that may be necessary to implement your business or succession plans.
- expertise to provide comprehensive plans to address your personal tax needs. Shelagh can work with you to explore appropriate strategies in the areas of personal financial planning, estates and trusts planning, cross border planning and offshore planning to ensure your financial and estate planning objectives are met in a tax efficient manner.
- expertise to provide the most tax efficient means of structuring charitable gifts both during your lifetime and through your will.
- expertise to explore with you the many tax effective uses of life insurance including consideration of the use of life insurance to tax-efficiently fund your estate.

Community Affiliations:

- Member, Advisory Board and Volunteer, Our Place Society
- Member, STEP Canada Education Committee
- Past Director and past Chair of Finance, Duke of Edinburgh Awards Program, BC Region
- Past Chair, Chair of Finance and Director, Vancouver Island Chapter of Canadian Association of Family Enterprise (CAFÉ)
- Past Governor and Chair of Finance, Glenlyon Norfolk School
- Past Member, Board of Examiners, Institute of Chartered Accountants of British Columbia

Other Matters of Note:

- 2014 and 2015 STEP National Conference, presenter "Post-Mortem Planning for Private Company Shares"
- 2012 Victoria Chamber of Commerce Business Person of the Year
- Canadian Tax Foundation 2011 Annual Conference, co-author "Disarming the Succession Time Bomb."
- CICA Income Tax Practitioners Course, Tutor (2010-current)
- ICABC Instructor Advanced Tax Planning Courses, (2009-2014)
- CICA Advanced Tax Issues for Owner Managed Business, Tutor (2005-2007)
- Canadian Tax Foundation 2002 Annual Conference, co-author "Post Mortem Planning – the New Regime".
- CAFE Certified Family Business Facilitator
- Frequent speaker and instructor regarding advanced tax and estate planning matters
- Kiwanis Gold Medal for highest standing in the 1986 UBC Commerce Graduating Class

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