

OUR MISSION

To increase the wealth, knowledge and quality of life for our clients, staff, and colleagues by continuously improving on and providing current, relevant, technically accurate, strategic planning for business, financial, and tax matters while allowing for a flexible work/life balance for all involved.

OUR VISION

To become the advisor of choice for small business owners, financial service providers, and small accounting practitioners in the Central Alberta region.

YOUR TEAM

Who do you want on your team today?

- Income Tax & GST Auditor
- In-Depth Taxation Specialist
- Certified Management Accountant
- Certified Financial Planner
- Chartered Manager
- Certified Professional Bookkeeper
- Succession & Estate Planner
- Strategic Business Advisor
- Merger & Acquisition Planner
- Community Volunteer

All of these skills are right at your fingertips with CGL Strategic Business & Tax Advisors.



**Crohn's and Colitis
Foundation of Canada**
Fondation canadienne des
maladies inflammatoires
de l'intestin

CGL Strategic Business & Tax Advisors
Is a strategic supporter of the Crohn's and Colitis
Foundation of Canada.

CGL Strategic Business & Tax Advisors
B102 - 356, 5212 48 Street
Red Deer, AB T4N 7C3

CGL
PUT LIFE IN YOUR BUSINESS
STRATEGIC BUSINESS & TAX ADVISORS*

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WHERE SHOULD YOU SPEND YOUR TIME?

Find the best high-rate savings account?

Earn 1-3% a year.

Pay off the mortgage?

Save 4-6% a year.

Analyze Investments?

Long-Term: 8% rate of return.

Improve your Small Business?

Maybe a 10-20% rate of return.

Tax Planning?

Savings of 14-39% per year.

YOU DECIDE!

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CORPORATION & BUSINESS SERVICES

Our firm advises clients ranging from growing owner-managed businesses to major enterprises on strategies for reducing their tax burdens.

This involves assessing the effectiveness of business structures, planning the form of receipts and expenditures to achieve enhanced tax treatment, structuring acquisitions and dispositions effectively, and identifying available tax opportunities.

Our professional staff can help you:

- Ensure your business is structured to efficiently manage taxes now, and in the future
- Analyze the tax impact of business decisions
- Select the best structure for proposed transactions and investments

PERSONAL TAX SERVICES

Rapidly changing tax legislation means that experienced personal tax advice is essential for high net worth individuals, owner-managers of businesses, and corporate directors and executives.

These individuals also need to develop a sound financial plan to maintain their personal and family wealth inside the value of their estates.

We offer comprehensive strategic tax and planning advice for high net worth individuals, trusts and partnerships.

Drawing on broad experience, we can help you define financial goals, design strategies to achieve those goals, and set the plan in motion.

We will also provide you with tax effective strategies for important transactions and situations, such as the sale of a business or an appreciated property.

WEALTH & SUCCESSION PLANNING SERVICES

In some cases where a family business has been sold, the family's largest asset after the sale is cash. In other cases, wise investment decisions have resulted in the accumulation of significant wealth.

Since the bulk of such estates will ultimately accrue to the children, families should have a plan in place to deal with issues such as the age at which children should have access to this wealth and should their be controls or restrictions on the use of this wealth.

We can help develop a plan for intergenerational transfer of wealth that will meet the objectives of managing tax, preserving value, and ensuring the financial well-being of your children.

TRUST & ESTATE PLANNING SERVICES

Individuals and business owners who do not have a comprehensive estate plan risk a significant reduction of the estate's assets by taxes, probate fees, and other related costs. This could result in the liquidation of assets by an estate that is not intended under the will.

We offer comprehensive strategic planning advice on ways to manage these costs arising on death while leaving as much as possible to their heirs.

MERGER & ACQUISITION SERVICES

In recent years there has been an international trend toward increasing takeovers which has pushed merger and acquisition activity to its highest level ever. As economic globalization and related technological changes continue, these business combination activities are expected to continue.

Our services go well beyond traditional tax compliance and due diligence to focus on the tax opportunities that arise in an acquisition.

We can help design the transaction in a way that efficiently manages the tax costs, while remaining consistent with your business objectives.

OUR APPROACH

Effective tax advice and business planning can give your business a competitive advantage.

Our firm offers your clients:

- a next-door neighbour approach
- prairie business ethics
- vast industry experience
- knowledgeable staff, and
- a network of local resources

This allows us to identify and assist with issues specific to your clients business needs.

How can we help you,

PUT LIFE IN YOUR BUSINESS