As a tax specialist and trained facilitator, **Shelagh Rinald, CA, 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:

- 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:

- 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 Securites Course (Honours), 1984

... expertise to provide comprehensive and innovative solutions for your corporate tax planning needs including 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. As a Certified CAFE Family Council Facilitator, Shelagh has the skills 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.

Professional Memberships:

- Member, Institute of Chartered Accountants of British Columbia
- Member, Canadian Institute of Financial Planners
- Member, Canadian Tax Foundation
- Member, Victoria Estate Planning Council
- Member, Society of Trust and Estate Practitioners

Community Affiliations:

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

Other Matters of Note:

- CICA Income Tax Practitioners Course, Tutor (2010)
- 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"
- Kiwanis Gold Medal for highest standing in the 1986 UBC Commerce Graduating Class