



## Tax Seminars in Australia: Tax Planning For Canadian Expatriates

The seminars will focus on the following topics:

- Canadian residency for tax purposes
- Canadian filing and reporting requirements
- Tax planning for Canadian expats, either departing Canada or arriving in Canada
- Ownership of property in Canada and the tax implications for Canadian non-residents
- Tax implications for ownership of investments in Canada and abroad for Canadian non-residents
- Expatriate financial planning issues for former residents of Canada now resident in Australia
- AND Questions about other expatriate tax issues will be answered

**Registration:** Please register at [events@trowbridge.ca](mailto:events@trowbridge.ca) and indicate the event (city and time) you are interested in attending.

### Melbourne event details:

Date: Wednesday, October 26, 2016  
Times: 6:00 PM – 8:00 PM  
Location: RACV Club Bourke  
Room  
Level 2, 501 Bourke Street Melbourne  
VIC 3000, Australia

### Sydney event details:

Date: Thursday, October 27, 2016  
Time: 6:00 PM – 8:00 PM  
Location: OFX Head Office  
Boardroom  
Level 20, 60 Margaret Street Sydney  
NSW 2000, Australia

**Cost:** Free

### Events Sponsored by:

Prairie Heritage Wealth Management Pty Ltd: [www.prairieheritage.com.au](http://www.prairieheritage.com.au) ReDev Properties: [www.redevproperties.com](http://www.redevproperties.com)

### Guest Speakers and contact details:



**Arun (Ernie) Nagratha, CPA, CA, CPA (Illinois) Trowbridge Professional Corporation.**

Ten years ago while working as a Finance Manager in Australia, Ernie experienced firsthand what it was like to be an expat living abroad and saw a need for an expat tax advisor service. Ernie is a Canadian Chartered Professional Accountant, specializing in expatriate taxation as it relates to Canadians living and working around the world. Ernie joined Trowbridge Professional Corporation shortly after its inception in 2002 to build the expatriate tax services practice. He has completed levels I and II of the Canadian Institute of Chartered Accountants In-depth Taxation Program and is a current member of the Institute of Chartered Accountants of Ontario. Ernie graduated with his of Business Administration from the Schulich School of Business, York University, Toronto.

Arun (Ernie) Nagratha: [arun.nagratha@trowbridge.ca](mailto:arun.nagratha@trowbridge.ca) Trowbridge Professional Corporation: [www.trowbridge.ca](http://www.trowbridge.ca)

**Craig Lasby, BA, ADFS, CFP (Canada), Prairie Heritage Wealth Management Pty Ltd.**

Working in conjunction with Godfrey Pembroke Limited, part of NAB's MLC Wealth Management division, Craig's mission is to help 'simplify and enhance the lives' of both his domestic Australian and expatriate Canadian clientele resident in Australia. Since 1990, he has been his client's 'Personal CFO', continuing a client centric financial advice tradition dating back to the early 1950's when his father Percy began advising clients in Western Canada. Your values, and what is important about money to you, are the focus of Craig's practice philosophy. It is the combination of this philosophy and his unique mix of international experience, financial sophistication and down-to-earth sensibilities that allow him to provide a safe harbour to clients in all things financial. Craig is a Canadian Certified Financial Planner and a current member of the Financial Planners Standards Council. He has a Bachelors degree from Briercrest College in Saskatchewan and holds an Advanced Diploma of Financial Services in Australia.

Craig Lasby: [craig@prairieheritage.com.au](mailto:craig@prairieheritage.com.au) Craig Lasby LinkedIn: [Craig Lasby](#)

**Jonathan Sermon, Open Financial Exchange (OFX)**

Jonathan Sermon is the Alliance and Partner Manager at OFX, a global, publicly-listed, specialist in foreign exchange. As Senior Alliance Manager for the Group, Jonathan is responsible for building and maintaining relationships with third party organizations across the globe and helping their clients to arrange any international payments or transfers. He specializes in working with CEOs, CFOs, Financial Planners, Private Wealth Advisers, fellow Business Development Managers, and Marketers.

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**Jonathan Lerner, Network Canada**

Jonathan is the founder of Network Canada, a 30,000+ person-strong group of young professionals including the largest network of Canadians living in Australia. In addition to hosting large and small events (including the largest Canada Day celebration in the world outside of Canada), Jonathan and his team regularly assist Canadian expats in getting adjusted to life in Australia. In addition to his involvement with a number of start-up and early-stage businesses and social enterprises, Jonathan's personal background is in investment banking, law and sustainable management. Email: [jonathan@networkcanada.com.au](mailto:jonathan@networkcanada.com.au) Web: <http://networkcanada.com.au/>



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