



**Zeifmans**  
Ideas with impact



## ABOUT US

You want a tax, accounting, and consulting partner who understands your needs and the full range of solutions available. One who works within the rules to make the rules work for you. Who gives you straightforward, intelligent advice that consistently adds to your bottom line.

## **GREAT IDEAS. POSITIVE IMPACT. THAT'S ZEIFMANS.**

Since 1959, Zeifmans has been developing innovative financial, tax and accounting solutions driven by creative insight. Over 60 years later, we remain entrepreneurial, and so we naturally have a comprehensive understanding of the needs of owner-operated and family-run businesses. We advise over 9,000 clients year after year – over 4,000 being private companies – as those businesses continue to grow and prosper with our support. As a matter of fact, hundreds of our clients have been with us for more than a generation. Why? Because our connection with you, our client, is a trusted long-term relationship based on the common goal of helping your business grow and profit.

## THE PERFECT FIT

Big business expertise, delivered with the intimacy of a small business team

Even though our team has grown to over 150 individuals servicing thousands of clients, we still maintain the small business intimacy and entrepreneurial spirit that got us started. You'll benefit from the right sized team for all your needs. Our partners draw on their combined hundreds of years of experience to provide consulting, assurance, compliance and tax services supported by their diversely skilled team members. So not only will you benefit from the experience and judgement of our senior leaders, but also from the sharp, innovative thinking of our young associates.

## GLOBALLY CONNECTED

Your access pass to the best of all worlds

Zeifmans offers you the benefit of access to a global network of accounting and consulting professionals as a member of Nexia International – one of the top ten global networks of accounting and consulting firms.<sup>2</sup> For over 25 years, Nexia International has ensured that all member firms meet and maintain high quality control standards. Meaning, we can partner with our affiliate Nexia firms operating in more than 122 countries around the world, allowing us to support you in achieving growth across multiple markets.

ZEIFMANS  
BY THE  
NUMBERS\*



One of the  
**TOP 20**  
largest Canadian  
firms ranked  
by revenue<sup>1</sup>



**18 Local**  
Partners/Principals



**150+**  
local team  
members



**11,000+**  
clients



**700+** offices  
around the world

NEXIA BY THE  
NUMBERS\*



Ranked  
**TOP 10**  
largest global network  
of independent accounting  
and consulting firms<sup>2</sup>



**3,400+**  
global partners



Globally connected  
**120+ countries**

## A ONE-STOP FIRM

We do it all

While Zeifmans operates with an entrepreneurial spirit, we are a full service, one-stop firm where you will benefit from the wide range of services available as your company grows and matures. Ranked one of the top 20 largest Canadian accounting firms by revenue in Canada<sup>1</sup>, we have numerous professionals that can help you with, traditional consulting, tax, audit and accounting services, and more.

Wealth Management

US Personal and  
Corporate Taxation

Cross Border Tax Planning

Mergers & Acquisitions,  
Corporate Finance and Valuation

Succession and Estate Planning

International Business  
including Israeli Companies

Going Public

Audits of Public Companies<sup>3</sup>,  
Hedge Funds, including Cayman  
Islands<sup>4</sup>, Pension Funds and  
Investment Dealers<sup>5</sup>

Corporate Turnaround,  
Recovery and Insolvency

Estates, Trusts and  
Estate Trustee During  
Litigation (ETDL)



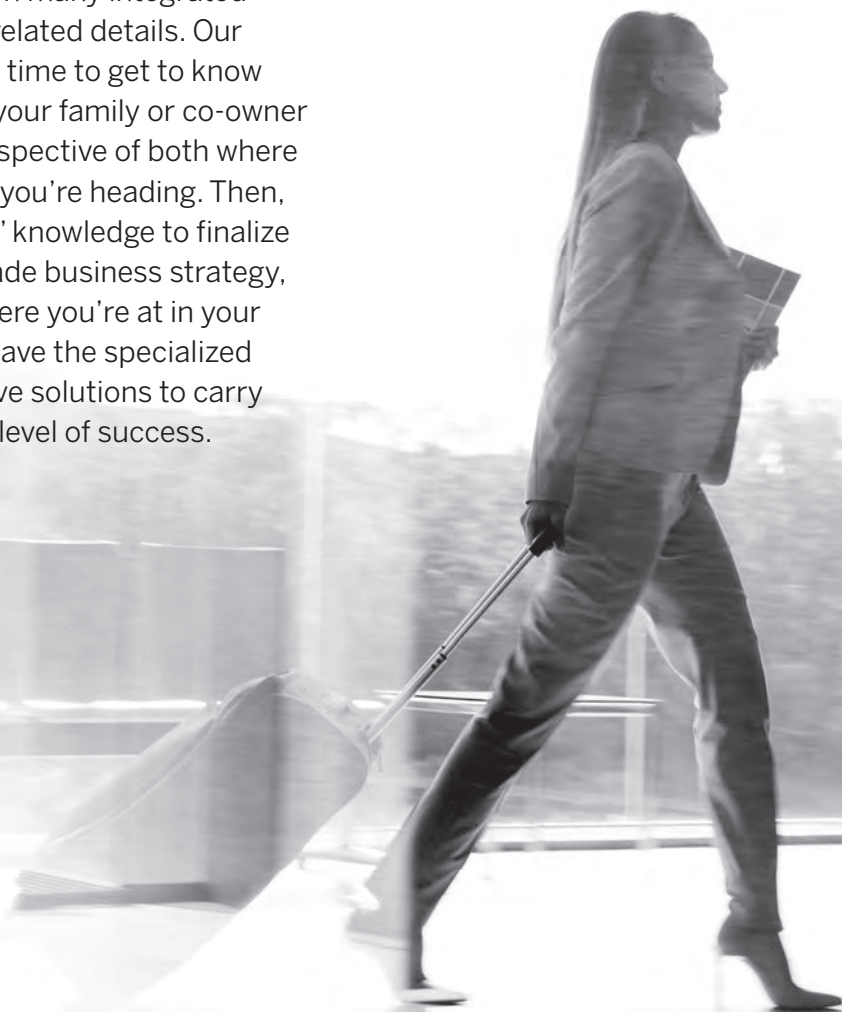
Though our team has a great deal of specialized knowledge, we are anything but a niche firm. Over the years, we've proudly amassed experience across a number of different markets throughout the globe, enabling us to provide world-class advice in several different areas, including but not limited to the following:

- Real Estate
- Distribution
- High Net Worth Individuals
- Manufacturing
- Financial Services
- Retail
- Not-for-Profit and Charities
- Healthcare
- Services
- Technology & Startups
- Entertainers, Athletes and Sports Teams
- Cannabis

## PERSONALIZED INSIGHT

### Custom built solutions that achieve your business goals

We understand that each of our clients is unique, and that each financial decision needs to take into consideration many integrated personal and business-related details. Our team members take the time to get to know you, your business and your family or co-owner situation – from the perspective of both where you've been, and where you're heading. Then, we use that "big picture" knowledge to finalize the details of a tailor-made business strategy, so that regardless of where you're at in your business' life cycle, we have the specialized knowledge and innovative solutions to carry you through to the next level of success.



# A CASE STUDY

## The Zeifmans difference in real life

### CLIENT CHALLENGE

A consumer products company – marketing solely through social media – experiences a rapid sales growth rate of a hundred times revenue within a month! 90% of the company's customers are located in the US and international markets, with all manufacturing and sales handled in the US, and marketing headquartered in Canada. The company was concerned about their US and Canadian tax compliance and the potential exposure to global tax rates of over 40%. The owners desired the ability to be in a tax efficient position should they wish to sell their company.

### ZEIFMANS SOLUTION

- **Strategy.** We advised our client to structure their operations and business in a tax efficient manner.
- **Valuation.** We provided a valuation to support the current value of the business, which was critical to the owners.
- **Global Insight.** We leveraged our global connections through Nexia International to assist with overseas VAT and related tax issues. We also worked with transfer pricing experts to ensure that the client was compliant with international tax requirements.
- **Operations.** We assisted in the organization of international subsidiaries, and implemented a reorganization of the various entities – as a means of optimizing tax outcomes at the various taxation levels – resulting in the creation of a structure that minimized overall world-wide taxation.

### ZEIFMANS IMPACT

We were able to significantly reduce our client's global tax rate. The owners retained Canadian residency for tax purposes and reduced their overall tax burden by avoiding significant US and global tax exposure. The owners were provided with a tax road map designed to avoid Canadian, US and global tax traps and maintain compliance on a go forward basis.

## Connect with Zeifmans today

Allow Zeifmans to support your business in conquering new levels of success. Let's create a lasting partnership, starting today:

**Call us:** 416.256.4000

**E-mail us:** [info@zeifmans.ca](mailto:info@zeifmans.ca)

**Visit us:** 201 Bridgeland Avenue,  
Toronto, ON, M6A 1Y7



1. Zeifmans LLP is ranked 18th largest Canadian firm ranked by revenue according to The Bottom Line magazine annual ranking of accounting firms in Canada in 2016.
2. Nexia International is ranked 9<sup>th</sup> largest global network by fee income (US dollars) according to the International Accounting Bulletin Survey in 2018.
3. Zeifmans is a participant in the Canadian Public Accountability Board (CPAB) and the US Public Companies Accounting Oversight Board (PCAOB), authorizing it to audit public companies in both Canada and the US. CPAB and PCAOB are, respectively, Canada's and the US's public company auditor regulators.
4. Audits of Cayman Islands hedge funds performed by Zeifmans (Cayman).
5. Zeifmans is a panel auditor for the Investment Industry Regulatory Organization of Canada (IIROC), the national self-regulatory organization which oversees all investment dealers and trading activity in the debt and equity marketplace in Canada. Only panel auditors are authorized to audit IIROC-registered investment dealers.

\* Zeifmans and Nexia by the numbers as of February, 2020.

Zeifmans LLP is a member of Nexia International, a worldwide network of independent accounting and consulting firms. Springbank Capital Corp. is an affiliate of Zeifmans specializing in Mergers & Acquisitions, Finance and Valuation.

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