Why choose Zeifmans?

Zeifmans is owned by entrepreneurs that started the firm as a small business almost 60 years ago.

Now, three generations later, we continue to grow with over 150+ staff, and remain owner-operated. Therefore, we understand the needs of owner- operated and family-run businesses. We use our hands on experience and knowledge to customize proactive, innovative solutions for each phase of your business and estate's life-cycle.

Our 11,000 clients, including companies, professionals, executives and high-net-worth individuals, rely on us for a variety of financial planning services to help them meet their financial goals. Regardless of where you're at in your business' life cycle, our trust and estate advisors, who work with trusts and estates of all sizes – some in excess of over $1 billion – can help. We partner with like-minded top lawyers and other professionals to create a plan to protect and grow your estate for generations.

Our partners draw on their combined hundreds of years of experience to provide tax, consulting, assurance and compliance services to our entrepreneur and high-net-worth clients. This is why over 95 percent of our clients return each year, with hundreds having been with us for more than a generation.

Zeifmans was the 18th largest firm by revenue in Canada in 2016 according to The Bottom Line magazine, and is a member of Nexia International, which is one of the top ten global networks of accounting and consulting firms. As a part of Nexia, we have access to more than 300 member firms operating in over 120 countries around the world, so as your reach expands around the world, you can tap into this network to help you grow.

We're your trusted advisor

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.**

Contact us today

Contact your Zeifmans advisor or one of the partners below:

- **Robert J. Benmergui, Principal**
  rb@zeifmans.ca | 647.256.7558
- **Ezra Lauterpacht, CPA, CA, Partner**
  el@zeifmans.ca | 647.256.7616
- **Steven Metallo, CPA, CA, Partner**
  sms@zeifmans.ca | 647.256.7643

Nexia

201 Bridgeland Avenue | Toronto | Canada
416.256.4000 | www.zeifmans.ca

Zeifmans LLP is a member of Nexia, a worldwide network of independent accounting and consulting firms.

High Net Worth Services

Zeifmans
Ideas with impact

You’re building wealth over a lifetime...and longer

Whether you’re an accomplished investor, owner-operator or have a stake in a private or family-owned business, your accumulated wealth is a direct result of your hard work and dedication. Wealth creation and preservation don’t end with you, however. Your wealth can continue to grow for many generations, especially if you plan appropriately. By establishing the best financial and tax structures during your lifetime, you could avoid a possible reduction of the wealth you leave to next generations, and also positively impact the future financial success of your business and family.

Think of your wealth as a unique financial puzzle made up of many integrated personal and business- related pieces. These pieces include family issues, income and asset growth, investments, retirement, estate planning, and philanthropy.

We can help you organize and understand all of these pieces in order to develop effective tax and estate planning strategies that are tailored to your business. These strategies include minimizing taxes, maximizing cash flow, protecting your assets, driving results and building value.

We can help you with

- **Wealth Management**

  It goes without saying that it is crucial to protect your estate and business’ assets. We can assist you with asset and investment monitoring, succession planning, real estate consulting, philanthropic planning and execution.

- **Tax and Estate Planning**

  You have worked hard to build your estate and now want to protect those assets. We can help you structure your business and estate to defer tax, save tax and protect assets for future generations.

- **Exit Strategies and Succession Planning**

  You need an exit strategy that will allow you a comfortable retirement, and a succession plan that lets you pass control to the next generation or a third party in a way that maintains the continuity of the business and your legacy.

- **Transactions and Valuations**

  If a merger or acquisition is in your future, our transaction and business management expertise can help you create the right deal for you and your business.

- **Compensation**

  Strategic compensation plans for you, your senior management and other employees will assist in maximizing retention and minimizing taxes, while keeping your business structure flexible and sustainable.

- **Compliance and Back-Office Support**

  We provide businesses with reliable, experienced support in handling daily accounting matters, and preparing your reporting obligations such as tax returns for both Canadian and US individuals and operations.

- **Family CFO**

  Our team of professional advisors can oversee all of your financial affairs. We partner with your advisors including lawyers, bankers, insurance brokers, real estate agents and investment advisors–streamlining and simplifying your life so you can focus on achieving your strategic goals.