ROTHMOSEY

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Academic Background

- Bachelor of Business Administration (Hons.), Wilfrid Laurier University, 2012
- Chartered Professional Accountant Designation, 2015

Service Areas

- Acquisition Services
- Corporate Taxation
- Divesture Services
- International Expansions
- Personal Taxation
- Sales Tax Services
- Succession and Estate Planning
- Trusts and Estates

Industries

- Agriculture
- Professional Corporations
- Real Estate Holdings

Community Service

- Treasurer, St. Leonard's House of Windsor

Alan Valihora, CPA, CA
Senior Manager - Tax

Alan is currently a senior manager in our Tax group. He has been working with the firm since 2011. Alan obtained his Chartered Professional Accountant (CPA) designation in 2015. He graduated from Wilfrid Laurier University having completed his Bachelor of Business Administration with honours in 2012 and completed CPA Canada's In-Depth Tax Course in 2017. He currently teaches the In-Depth Tax course through CPA Canada and is the treasurer of St. Leonard's House of Windsor.

Alan provides guidance in the areas of personal and corporate tax planning, preparation of corporate, personal, and trust tax returns, estate and succession planning, purchase and sale transactions, corporate restructuring, and assisting with the cross border tax implications of individuals and corporations with Canadian and U.S. filing requirements.

He also has years of experience as a marker/facilitator with CPA Canada, assisting prospective CPAs in their preparation of the Common Final Examination (CFE).

Alan's knowledge and experience provides our clients with the following valuable services:

- Assist in compiling your financial statements summarizing your financial results with no assurance provided.
- Gain an understanding of your business while compiling the notice to reader financial statement and can highlight large variances noted or provide other advisory services for your business based on items noted.
- Prepare tax estimates for upcoming periods, so you can effectively manage the cash flow of your business and analyze opportunities to structure your business dealings in a more tax efficient manner.
- Prepare Canadian and U.S. personal income tax returns and calculate required tax installments.
- Identify and provide guidance regarding tax planning opportunities that can reduce your tax burden.
- Provide guidance regarding structuring the ownership of assets in a manner that meets your business, personal, and tax goals, which sometimes includes a trust.
- Assist clients with assessing the tax compliance requirements on Canadian/U.S cross border business activities and assist in preparing the related returns.
- Provide tax advice regarding structuring the sale in a tax efficient manner, including analysis of whether it is more beneficial to sell the assets or shares of a business.