



## **Calvin Tan, CPA, CA** **Tax Manager**

Calvin is currently a Manager in our Tax group. He joined Roth Mosey in June 2020. Calvin obtained his Chartered Professional Accountant (CPA) designation in 2018 and graduated from the University of Waterloo's Master of Taxation program in 2019.

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### **Academic Background**

- Bachelor of Business Administration, University of Toronto Scarborough, 2013
- Chartered Professional Accountant Designation, 2018
- Master of Taxation, University of Waterloo, 2019

### **Service Areas**

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

Calvin's years of knowledge and experience provides our clients with the following valuable services:

- Identify and provide guidance regarding tax planning opportunities that can minimize tax burden.
- Provide guidance regarding structuring of business ownership in a manner that meets business, personal, and tax goals, including succession planning and reorganization of share ownership.
- Provide tax advice regarding structuring the sale of a business in a tax efficient manner, including analysis of whether it is more beneficial to sell the assets or shares of a business.
- Representation with Canada Revenue Agency in regard to personal or corporate tax issues and disputes, including audits and voluntary disclosures.
- Assess tax compliance requirements on Canada/U.S. cross border business activities including potential tax treaty relief, and preparing the relevant returns.
- Prepare Canadian corporate tax returns and other related filings.
- Prepare Canadian and U.S. personal income tax returns and calculate required tax installments.
- Provide guidance on sales tax compliance, including GST/HST.