



VALUE ADDED APPROACH

1. Value Added Defined

- Make/save the client more money than the fee that you charge the client
- i.e. focus on the overall financial advantages/savings and not just the initial cost

2. Are Accounting/Tax Services a Commodity?

- Commodities are similar products/services (i.e. TV. sets) that are the same no matter where you purchase them, and you can focus primarily on initial price
- Lawyers/Legal services are not a commodity!
i.e. if you were on trial for murder, would you hire the “cheapest” lawyer ?
- Medical/Health services are not a commodity!
i.e. if you lived in the US and had to pay yourself for a critical life saving surgery, would you hire the “cheapest” doctor/surgeon ?
- ACCOUNTING/TAX SERVICES ARE NOT A COMMODITY!
- Tax/Financial Issues are NOT a precise science, but an art due to the very subjective nature of both the Income Tax Act and financial planning/investment advice
- i.e. if CA firm A quotes \$1,200 for a corporate year end, and CA firm B quotes \$1,800 for the same corporate year end, but CA firm B can provide a result of \$5,000 less in overall taxes payable than CA firm A, which CA firm is “cheaper”?
- We strive to be competitive on our accounting fees, but we compete primarily on a value added approach, and not on price alone like H&R Block!
- “Getting the numbers right” is only the beginning, and not the end of the responsibility for a value added accountant with respect to their clients

3. What are some examples of how we provide a “Value Added” advantage that is different when compared to other CA/Accounting firms?

a) Creative/Aggressive/Unique Tax Strategies to Minimize Income Taxes

- We pioneered and support our clients with independent contractor vs. employee tax issues, which is still a significant CCRA tax audit risk for incorporated consultants
- We maximize and achieve significant tax savings from income splitting among family members for our clients
- We reduce income tax for our clients by maximizing what can be considered as business expenses, using both some unique tax approaches, and also by being able to benchmark/analyze each clients expenses versus our large database of all similar IT corporate client expenses
- We use creative approaches to minimize the corporate income taxes payable on corporate investment income
- We enable our clients to take full advantage of income tax laws that allow individuals to receive both home and automobile loans from their corporations
- We pioneered in Canada, and continually update, an aggressive approach to minimizing income taxes for clients that work in the US, and the tax savings achieved by some of our clients working in the US have exceeded \$50,000 per year - we offer a free seminar called “Working in the US” which provides tax/immigration advice for IT consultants



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b) Audit Insurance Provided to Support/Defend Clients

- For only \$200 per year optional audit insurance is available that provides unlimited support up to the Tax Court level to clients who may be subject to an income tax audit
- As far as we know, no other CA firm in Canada even offers such a product, but instead would usually charge the clients possibly thousands of dollars, maybe much more than the initial corporate tax return accounting fee, for defending any subsequent tax audits

c) Unique “Financial Freedom Coaching” Program Available

- We believe that the primary responsibility of a value added accountant is to be the clients “net worth manager” and the accountant should measure their success by how much they have helped the client increase the clients net worth until the client achieves Financial Freedom!
- We have developed our own unique internal approach/strategies to assist clients in achieving Financial Freedom
- We were driven to create this internally due to the poor alternative “financial planning” practices that exist, which are mainly commission/high fee/conflict plagued, and also usually completely exclude several critical financial planning issues such as creditor proofing
- We offer a FREE monthly client seminar on Financial Freedom Coaching

d) Marketing Support To Assist IT Clients in Finding Contracts

- Since 1984, we have specialized in incorporated IT consultants, and assisted thousands of IT consultant clients in finding contracts
- We maintain working relationships with over 50 IT placement agencies in Canada and the US, and provide clients with a list of these agencies if they are searching for an IT contract
- We offer a free seminar called “Getting Your Next Contract” which offers creative marketing strategies/tips to IT consultant clients
- Strong marketing skills are critical and can sometimes be more important than IT technical skills in maximizing IT consulting contract income!

e) Free Seminars

PLEASE COMPARE ALL OF THE ABOVE TO OTHER CA/ACCOUNTING FIRMS, AND THEN ASK YOURSELF, WHICH FIRM IS TRULY “CHEAPER”?



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