

Bryan Haralovich

CPA, CA, CPA (Illinois) at Welch LLP

Ottawa, ON, CA

Providing financial services to entrepreneurs from both private and public companies.

Description

Bryan Haralovich joined Welch in 2011 after supporting clients as a partner with a global firm. With over 20 years in public accounting, Bryan is specializing in audit, taxation, risk management, and business advisory services. He has a passion for supporting entrepreneurs and owner-managed businesses by leveraging his extensive experience in the accounting industry both in Canada and in the U.S.

Bryan leads Welch's Technology Services group. He has served technology companies from start-up to successful exit, including support with public and private financing. The majority of Bryan's clients have had a global footprint and the experience he gained in that sector allows him to support entrepreneurs in managing issues arising from doing business abroad.

Bryan has experience providing audit, accounting and advisory services. He has worked extensively with both public and private companies in various knowledge-based industries. He has assisted local companies with the raising of capital and mergers and acquisitions, working with several companies from start-up to successful exit. Bryan has assisted publicly-traded technology companies and emerging businesses working with both Canadian and U.S. accounting standards and securities rules and regulations.

Bryan has been a strong supporter of the Ottawa community including his involvement as a Board member with the organizing committee that brought the 2000 Special Olympic Games to Ottawa. He is currently a Board member and the Chair of the Audit and Finance committees for both the National Capital YMCA and the Ottawa Centre for Regional Innovation (OCRI). Bryan's personal interests revolve around his family and active living.

Availability

Keynote, Moderator, Panelist, Workshop, Host/MC, Corporate Training

Industry Expertise

Accounting, Financial Services, Corporate Leadership, Non-Profit/Charitable, Capital Markets, International Trade and Development, Management Consulting, VC and Private Equity, Business Services, Information Services

Topics

Corporate Finance, Corporate Governance, Mergers & Acquisitions, Business Planning & Due Diligence, Internal Controls Advisory, Government, Audit Assurance, Ipo Advisory, Entrepreneurship, Financial & Management Strategies for the Technology Sector

Affiliations

National Association of State Boards of Accountancy of the United States, Canadian Institute of Chartered Accountants, Institute of Chartered Accountants of Ontario, National Capital YMCA, Invest Ottawa, Rideau Valley Health Services

Sample Talks

New Financing Models in Canada and the U.S.

The lack of venture capital in Canada over the last few years has turned into opportunity for both experienced entrepreneurs and fund managers. This energized session will have Bryan outline various fund models, discuss what is happening to re-invigorate the venture capital landscape and how both investors, companies and the economy will benefit in the long term.

How to prepare for an Initial Public Offering (IPO)

An IPO is key financing event that has the ability to launch the company into a significant growth phase and create liquidity for investors. Learn how to effectively manage the IPO process and what to consider post IPO.

Funding 101 for Technology Entrepreneurs

Technology entrepreneurs never seem to stop efforts to raise the right type and amount of capital to fund their business. Learn about the various sources of capital, terms and conditions and the stage of growth when the various types of financing are most applicable.

Internal Control over Financial Reporting – Common Pitfalls

Many internal control regulatory requirements have been created. Each requires that internal controls over financial reporting be documented to evidence how key financial reporting risks are being mitigated & that an evaluation be performed to assess the effectiveness of the design & operation of the controls in place. Learn common areas controls break down & how best to address the design & operational effectiveness assessments.

Internal Control over Financial Reporting – Finding Value in Compliance

Numerous internal control regulatory requirements have been created. Each of these requires that internal controls over financial reporting be documented to evidence how key financial reporting risks are being mitigated and requires that an evaluation be performed to assess the effectiveness of the design and operation of the controls in place. Learn how to move from a compliance oriented approach to internal controls to a value added approach.

Past Talks

2015 Private Enterprise Accounting Updates

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New Financing Models in Canada and the U.S.

Ontario Venture Summit

Education

Carleton University
Bachelor of Commerce

Canadian Institute of Chartered Accountants
CA

National Association of State Boards of Accountancy of the United States
CPA

Accomplishments

Partner - Welch LLP

Assurance, tax and financial advisory services to entrepreneurs.

Welch LLP is a Chartered Professional Accounting firm that provides a full range of accounting, assurance, tax, advisory and specialty services. Welch was founded in 1918 and has over 270 staff spread among 12 offices in Eastern Ontario, Toronto and Quebec. Welch offers private enterprises, government and not-for-profit organizations industry specific services and knowledge with a relationship-driven approach to client service.

President - fiLenz

Financial advisory services including corporate finance, corporate governance, process review and design, internal risk advisory, accounting systems, accounting and audit support. Board member and audit committee chair.

Member of the Board - Canadian Special Olympics 2000 Winter Games - Ottawa

Member of the Board of Directors. Role was to provide finance support to the Board and volunteers as part of our planning and hosting of the 200 Winter Games held in Ottawa.

Partner - Ernst & Young

Audit and Advisory Partner.

Senior Manager - KPMG

Financial statement audit and technical accounting support.

Judge of the 2012 Bootstrap Awards

The Bootstrap Awards honors entrepreneurs and intrapreneurs who are starting up and are using self-capitalization techniques to fund their enterprises. Dr. Bruce M. Firestone, a local entrepreneur and founder of the Ottawa Senators, launched the Bootstrap Awards event in 2004 with Explorim.org, a registered not-for-profit organization, as he believed bootstrapping entrepreneurs deserved more recognition.

Director - Rideau Valley Health Services

Urgent and primary care facility.

Director, Chair Finance and Audit Committee - National Capital YMCA

The National Capital Region YMCA-YWCA is Ottawa's leading resource for health, fitness and recreation, child care, camping and outdoor education, and social services. Our four core values – caring, honesty, respect and responsibility – form the foundation of all Y programs. For over 140 years, the Y has been committed to building strong kids, strong families and strong communities.

Director, Finance and Audit Committee Chair - Invest Ottawa (formerly OCRI)

Invest Ottawa delivers economic development programs and initiatives that increase entrepreneurial momentum, wealth and jobs in the City of Ottawa and its surrounding region.

Invest Ottawa services include startup incubation and mentorship, acceleration for existing companies, global business attraction and local business retention, targeted sector development, commercialization, and marketing Ottawa's diversified economy and high quality of life.

Moderator - Canadian Club of Ottawa

Featured moderator at the Canadian Club of Ottawa event on Thursday, March 1st at the Chateau Laurier. The Panel featured Dr. Gigi Osler, President-Elect of the Canadian Medical Association, and Russ Roberts, Senior Vice President of Tax, Finance and Advocacy at CATAAlliance. The event was an opportunity to discuss innovation and tax reform and Welch was honoured to have Bryan involved in this important conversation looking into the future of economic growth in Canada.

Testimonials

Mark Scott

Welch is much larger (260+ professionals) than most regional accounting firms, part of BKR International which has member firms all over the globe, and the partner (Bryan Haralovich) is one of the best technology auditors in the business. They actually teach other firms for the CICA/CPA Canada and their technology tax group is phenomenal as well. From a customer service perspective, nobody compares to Welch and they are very reasonable on fees.

Antoine Paquin

We have been very impressed with Bryan Haralovich and the entire Welch team. They are always responsive and the tax group has been extremely effective – including helping us through the SR&ED claim process. We were previously with a Big 4 accounting firm and both my VP Finance and I are very happy that we made the switch to Welch last year.

John Chapman

As a publicly listed technology company, it's especially important that we have an excellent relationship with our accounting firm and receive outstanding service – and we do. We have had excellent communication from the team at Welch. They follow up with us, always return our calls and most importantly, they talk about potential issues ahead of time so when these issues arise, they are much easier to deal with and there are no surprises.

Martin Lyster

“Bryan is exactly the type of guy you want in your corner when growing your business. Bryan's advice over the past year has directly enabled several growth initiatives to happen here at MediaMiser.”

Gord Wyse

“As the CFO of many High Tech Start-Ups over the past decade I have had the privilege of hiring Brian as the Audit Partner to provide Audit and Tax services. Brian is a trusted advisor and I wouldn't hesitate to recommend or hire him in the future.”

Rob Thomas, BBA, MBA, CGA

“Since meeting Bryan in January 2011 and working closely with him in his capacity as Finance and Audit Committee Chairs of the NCR YMCA-YWCA, I have developed a deep respect in and encouragement from his insight and guidance. His experience, expertise, sense of urgency and passion for the Y are not only commendable but a great source of direction and motivation.”

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