

Jim McConnery

CPA, CA, TEP, Partner at Welch LLP

Ottawa, ON, CA

Tax and Estate Practitioner with a wide ranging expertise in tax, acquired through his 18 years of public accounting

Jim provides assistance to individuals and private companies with a particular focus on tax, estate and succession planning. He has been involved in educational programs for both the Canadian Institute of Chartered Accountants and the Institute of Chartered Accountants of Ontario.

Jim joined Welch LLP in 1994 after graduating from the University of Ottawa, where he received a Bachelor of Commerce degree with honours in Finance. He received his CA designation in 1997. Jim was with a national accounting firm's tax group for 10 years and returned to Welch LLP in 2007.

A key aspect of Jim's expertise relates to tax minimization strategies via family trusts – this includes income splitting strategies and multiplying access to the lifetime capital gains exemption. Jim also provides support in the context of the purchase or sale of private company groups.

Financial Services, Business Services, Accounting, Education/Learning

Tax Minimization Strategies, Income Splitting Strategies, Lifetime Capital Gains Exemption, Private Company Groups, International Taxation

Ottawa Business Growth Survey Breakfast 2016

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Ottawa Business Growth Survey Breakfast 2015

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University of Ottawa

Bachelor of Commerce Finance (Honours)

Partner - Welch LLP

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