

# **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

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## **Description**

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.

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## **Industry Expertise**

Financial Services, Business Services, Accounting, Education/Learning

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## **Topics**

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

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## **Affiliations**

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## **Past Talks**

**Ottawa Business Growth Survey Breakfast 2016**

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**Ottawa Business Growth Survey Breakfast 2015**

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## **Education**

## Accomplishments

### Partner - Welch LLP

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.

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