



Jason Stephan CA, LLB, TEP

Tax Counsel

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Jason is both a tax lawyer and a chartered accountant (now chartered professional accountant). Jason's main area of expertise is providing legal tax structuring for private businesses and their owners.

Prior to returning home to Central Alberta, Jason advised on a wide spectrum of tax matters at both a national law firm and a tax boutique law firm in Calgary. More recently, prior to starting CA Tax Law, Jason was the tax partner of a respected business law firm in Red Deer.

Jason graduated as the Gold Medalist at the Faculty of Law at the University of Calgary receiving the *William A. McGillivray Gold Medal* in Law for highest academic standing in his graduating class.

Tax Structuring Areas

Business Sales
Corporate Reorganizations
Business Successions
Estate Planning
Farm Tax Structuring
New Business Relationships
Business Tax Reassessments

Qualifications

- Bachelor of Laws, University of Calgary (Gold Medalist), 2002
- Barrister and Solicitor, Law Society of Alberta, 2003
- Member, Society of Trust and Estate Practitioners (TEP), 2012
- Member and Professional Service Provider, Chartered Accountant (CA), 2000, Chartered Professional Accountants of Alberta (CPA), 2015

Publications and Presentations

Jason loves practicing tax law and has published and presented on tax matters for many professional organizations including, the Institute of Chartered Accountants of Alberta, Canadian Tax Foundation, Canadian Bar Association, Legal Education Society of Alberta, and the Society of Trust and Estate Practitioners.

Course Instructor, Institute of Chartered Accountants of Alberta, courses titled Estate Planning for High Net Worth Individuals, General Practitioners Need to Know, and Charitable Giving: A Detailed Review of Tax Issues

Author and Presenter, Legal Education Society Alberta (LESA): How the 21 Year Deemed Disposition Rules Affect Trusts, 48th Annual Refresher Course – Wills & Estates, 2015 (Lake Louise, AB); Getting the Most Out of Your [Tax Counsel] Experts, 46th Annual Refresher Course – Real Estate, 2013 (Lake Louise, AB); Selected Tax Matters Involving Transactions of Farm Properties, 45th Annual Refresher Course – Real Estate, 2012 (Lake Louise, AB).

Author and Presenter, Canadian Tax Foundation: Estate and Tax Planning in Complex Family Situations, 2013 Prairie Provinces Tax Conference; Understanding and Dealing With the 21 Year Deemed Disposition Rules Affecting Certain Trusts, 2008 Prairie Provinces Tax Conference; Sale or Succession of the Owner Managed Business – Selected Topics, 2007 Prairie Provinces Tax Conference.

Author, Electing Out of CCPC Status in Share Sale Planning, (2007) vol. 7, no. 3 Tax for the Owner-Manager (Toronto: Canadian Tax Foundation, 2007).

Speaker, Purchase and Sale of a Business: Selected Items for Discussion, Canadian Bar Association, South Section Tax Non Specialists (Calgary, AB, 2007, former chair of section).