



## ROBERT LANE, BSC, MBA, CA

123 Woodlawn Road East ■ Brampton, Ontario ■ L8T 2K1  
Res: 905.123.4567 ■ Cell: 905.123.6789 ■ roblane@sympatico.ca

---

### HIGHLY EXPERIENCED CHARTERED ACCOUNTANT

*"Maximizing stakeholder value through astute tax & business solutions..."*

Seasoned executive with extensive experience in providing viable alternatives, strategies and solutions for complex tax and business issues. A highly ethical and proficient professional with unquestionable integrity, and commitment to excellence...

- Business Development & Client Growth
- Corporate, Personal, & Trust Tax Advice
- Elected Executive Committee Member
- Strategic Initiatives & Partnerships
- Team Building & Relationship Optimization
- Corporate Reorganization Plans
- Policies & Procedures Development
- Organizational Leadership
- SR&ED Refund Claims
- Revenue & Profit Growth

---

### KEY PERFORMANCE INDICATORS

- Provided a broad range of tax advice and services to owner-managed businesses while maintaining a high standard of client service and relations.
- Improved revenue growth by identifying, selling, planning, and implementing tax strategies, including:
  - Reorganizations, estate and succession planning, SR&ED refund claims, family trusts, purchase and sale of a business, divestitures and other tax advantaged opportunities.
- Enhanced the efficiency, effectiveness and quality of tax compliance and consulting services through the implementation of numerous strategic initiatives:
  - Prepared tax policies and procedures as well as tax department work order form.
  - Implemented templates to automate and streamline tax department processes.
  - Contributed to all aspects of the firm's paperless office initiative.
- Achieved significant client growth; increased billings by 42% in one year.
- Referred 16% of firm's total business in one year – assurance & accounting, valuation, and insolvency.
- Provided firm leadership and management as an elected member of the executive committee.
- Increased firm profile through written articles, presentation of seminars and community involvement.

*Continued...page 2 →*



# ROBERT LANE, BSC, MBA, CA

Page Two ■ Res: 905.123.4567 ■ Cell: 905.123.6789 ■ roblane@sympatico.ca

---

## CAREER CHRONOLOGY

- Thomas Crown LLP, Accountants and Advisors – Brampton, ON **1995 – 2007**  
**TAX PARTNER** (1998 – 2007)  
Key member of the leadership team; enhanced tax services and built strong client relations.  
  
**SENIOR TAX MANAGER** (1995 – 1997)  
Collaborated closely with clients, staff and partners as a senior team member on tax planning work.  
  
*Other key roles:*  
  
**PERSONNEL PARTNER** (1998 – 2001)  
Recruited quality staff and managed human resources.  
  
**EXECUTIVE COMMITTEE MEMBER** (2002 – 2007)  
Elected by fellow partners to manage all aspects of the firm.
  
- Waterton, Wallace, & Brown LLP, Chartered Accountants – Milton, ON **1992 – 1995**  
**SENIOR TAX MANAGER**  
Managed tax planning work and tax compliance services.
  
- ABCS LLP – Brampton, ON **1986 – 1992**  
**TAX MANAGER** (1990 – 1992)  
Managed audit, accounting and tax assignments and files.  
  
**SENIOR ACCOUNTANT** (1986 - 1990)  
Responsible for preparation of audit, accounting and tax files.

---

## COMMUNITY LEADERSHIP ROLES

- The Catholic Children's Aid Society of Brampton – Brampton, ON **2002 – Present**  
**PAST-PRESIDENT** (2006 – Present)  
**PRESIDENT** (2003 – 2006)  
**DIRECTOR** (2002 – 2003)
  
- The Golf Association of Ontario – Toronto, ON **2007 – Present**  
**DIRECTOR**
  
- The Brampton Junior Golf Tour Association – Brampton, ON **1989 – Present**  
**TREASURER** (2005 – Present)  
**DIRECTOR** (2001 – 2005)  
**PRESIDENT** (1999 – 2001)  
**VICE-PRESIDENT** (1996 – 1999)  
**TREASURER** (1989 – 1996)

Continued...page 3 →



# ROBERT LANE, BSC, MBA, CA

Page Three ■ Res: 905.123.4567 ■ Cell: 905.123.6789 ■ [roblane@sympatico.ca](mailto:roblane@sympatico.ca)

---

## FORMAL EDUCATION & CREDENTIALS

- McMaster University – Hamilton, ON 1984  
**BACHELOR OF SCIENCE** (Honours, Chemistry)
  - McMaster University – Hamilton, ON 1986  
**MASTERS OF BUSINESS ADMINISTRATION**
  - The Institute of Chartered Accountants of Ontario – Toronto, ON 1988  
**CHARTERED ACCOUNTANT**
  - The Institute of Chartered Accountants of Ontario – Toronto, ON 1992  
**CICA IN-DEPTH TAX COURSE**
- 

## PROFESSIONAL MEMBERSHIPS

Institute of Chartered Accountants of Ontario

Canadian Institute of Chartered Accountants

Canadian Tax Foundation

DFK Canada Inc. – Tax Group (founder)

---

## PUBLIC SPEAKING

Prepared and presented numerous tax seminars to partners and staff.

Prepared and presented various tax planning initiative seminars to clients and contacts in the bank, legal, investment and insurance industries.

---

## PUBLICATIONS

A fluent and prolific writer of tax planning and implementation correspondence.

Author of numerous tax memorandum and firm brochures. Monthly business columnist in Simcoe Reformer.

### Published articles

Milton Chamber of Commerce, Panorama Magazine – SR&ED (2003)

DFK / TL Tax Newsletter – Lucrative Tax Refunds from SR&ED (Fall 2005)

DFK / TL Tax Newsletter – Asset Protection (Year-end 2006)

***“Maximizing stakeholder value through astute tax & business solutions...”***