



MANU BHAI CPA PROFESSIONAL CORPORATION

CHARTERED PROFESSIONAL ACCOUNTANT

US * CANADA * INDIA



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Background

We are a professionally incorporated CPA firm based in Alberta, Canada, with our registered office located in the vibrant southwest quadrant of Calgary. Our leadership team brings over two decades of experience in audit & assurance, taxation, and accounting in India—serving a diverse portfolio of large and mid-sized corporations, public and private sector banks, government undertakings, non-profit organizations, and individual clients.

Drawing on this deep expertise, we understand that every client's needs are unique. We take the time to learn about your specific circumstances and objectives to deliver tailored, practical solutions. Whether you are a business owner seeking strategic financial advice or an individual managing complex tax obligations, we are committed to providing professional expertise and proactive guidance to help you achieve your financial goals.

Our dedicated team of tax and accounting professionals is driven by integrity, excellence, and a client-first mindset. We offer a full spectrum of services—including compliance, planning, and advisory—designed to meet the evolving needs of businesses and individuals alike.

By focusing on long-term relationships rather than one-time transactions, we strive to be more than just service providers; we aim to be your trusted advisors. Our role is to offer reliable support and actionable insights so you can make informed decisions, grow your business, and enjoy peace of mind knowing your financial affairs are in capable hands.

In addition to our Canadian practice, we extend our services to clients in the United States and India, providing cross-border expertise and seamless support. This multi-jurisdictional perspective allows us to address complex tax and accounting matters with clarity and confidence.

U.S. Services

Operating in or dealing with the United States tax system can be complex for both individuals and businesses. We provide end-to-end support to help you comply with U.S. regulations, minimize exposure to penalties, and make informed decisions across borders.

Foreign / Non-Resident Alien Services

We specialise in assisting foreign nationals and entities who have U.S. income or obligations. Navigating residency status, treaties, and reporting requirements can be overwhelming — we make it simple:

- **Double Taxation Avoidance Agreement (DTAA) Analysis:** Evaluate and apply treaty benefits correctly to prevent the same income from being taxed in multiple countries.
 - **Residency Status Determination:** Accurately determine whether you are a resident or non-resident for U.S. tax purposes, which drives how your income is taxed.
 - **Foreign Tax Credit Planning:** Identify and claim allowable credits to offset taxes paid abroad and reduce your U.S. liability.
 - **Foreign Information Returns:** Prepare and file all required disclosures of foreign assets, accounts, and transactions to avoid heavy penalties.
 - **Foreign Income Declaration & Non-Resident Income Tax Returns:** Ensure all U.S.-source and worldwide income is properly reported and returns are filed correctly and on time.
 - **FBAR & W-8BEN Filings:** Complete key compliance forms such as the Foreign Bank Account Report and the Certificate of Foreign Status to satisfy IRS and Treasury requirements.
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Business Services

From setting up a U.S. entity to handling ongoing compliance, we act as your partner on the ground:

- **Virtual CFO Services:** Gain access to senior financial expertise for forecasting, budgeting, and decision support without hiring a full-time executive.
- **IRS & State Representation:** We communicate directly with the IRS or state revenue departments on your behalf to resolve notices, audits, or disputes quickly.
- **Entity Formation:** Incorporate C-Corporations or form LLCs anywhere in the U.S., with proper structure and documentation to match your goals.

- **Employer Identification Number (EIN) Applications:** Obtain your federal tax identification number promptly so you can open bank accounts, hire staff, and pay taxes.
 - **Business Licenses & Registrations:** Navigate a patchwork of local and state licences — from sales/use tax and unemployment insurance to gross receipts and compensating taxes — so your business stays compliant.
 - **State Revenue Compliance:** File required returns and remit tax payments on time to avoid penalties and maintain good standing.
 - **Payroll Processing:** Complete payroll solutions, including biweekly payslip generation, withholding calculations and payments, and year-end Form W-2 issuance for employees.
 - **Corporate Governance Documents:** Draft and maintain operating agreements, bylaws, shareholder/board minutes, and resolutions to keep your company legally sound.
 - **Bookkeeping & Financial Reporting:** Accurate and timely record-keeping that gives you a clear picture of your business's health.
 - **Corporate Income Tax Returns (Form 1120):** Preparation and filing of federal and state returns for corporations, with planning to minimize tax impact.
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Other U.S. Services

We also provide targeted support for individual taxpayers and special filings:

- **Certifying Acceptance Agent Services:** As a certified acceptance agent, we can verify documents and assist with Form W-7 (ITIN applications) and Form SS-4 (EIN applications), expediting your process with the IRS.
 - **Personal Income Tax Returns (Form 1040):** Comprehensive preparation and filing for U.S. citizens, expatriates, and dual-status taxpayers, including cross-border planning and credits.
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Canada Services

Navigating Canadian tax and regulatory requirements can be challenging, especially for non-residents and cross-border businesses. Our firm provides comprehensive services to simplify compliance, minimize risk, and support growth in Canada.

Foreign / Non-Resident Services

We help individuals and businesses with Canadian-source income or obligations meet their compliance responsibilities and optimize their tax position:

- **Double Taxation Avoidance Agreement (DTAA) Analysis:** Apply treaty benefits correctly to avoid paying tax twice on the same income.
 - **Residency Status Determination:** Establish your correct residency status for Canadian tax purposes, which drives how your income is taxed.
 - **T1134 & T1135 Filings:** Prepare mandatory disclosures of foreign affiliates and foreign assets to avoid penalties.
 - **Foreign Tax Credit Planning:** Identify and claim allowable credits to offset foreign taxes paid.
 - **Foreign Income Declaration:** Proper reporting of non-Canadian income.
 - **Non-Resident Canadian Tax Returns:** Preparation and filing of required returns for individuals and entities.
 - **U.S. FBAR & W-8BEN Filings:** Assistance with U.S. foreign bank reporting and certificates of foreign status for U.S. tax withholding.
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Business Services

From incorporating a Canadian entity to maintaining ongoing compliance, we offer full back-office support:

- **Virtual CFO Services:** Strategic financial oversight without the cost of a full-time executive.
- **Compilation Engagement Reports:** Preparation of financial statements under Canadian standards for management or third-party use.
- **CRA Representation & Reviews:** Act on your behalf in dealings with the Canada Revenue Agency to address audits, notices, or disputes.
- **Business Incorporation:** Establish corporations, partnerships, or other entities in Canada with the right structure for your needs.

- **Business Licences & Numbers:** Register and obtain WEB accounts, Import Export Numbers, CRA Business and Corporation Numbers, GST/HST accounts, Payroll Account Numbers, and Dividend Account Numbers.
 - **Corporate Governance Documents:** Draft Unanimous Shareholders Agreements, Operating Agreements, Corporate Bylaws, minutes, and resolutions to maintain legal compliance.
 - **Payroll Processing:** Biweekly payslip generation, Form PD-7, payroll tax payments, and issuance of annual T4 slips.
 - **Bookkeeping Services:** Timely and accurate maintenance of financial records to support sound decision-making.
 - **T2 Corporation Income Tax Returns:** Preparation and filing of federal and provincial corporate returns.
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Condominium Corporation Services

We provide tailored support for condominium and strata corporations to ensure transparency and compliance:

- **Annual Budget Preparation:** Plan and manage operating and reserve fund budgets.
 - **Business Number & Account Registration:** Obtain necessary registrations with CRA for tax compliance.
 - **Monthly Bookkeeping:** Maintain clear, up-to-date financial records.
 - **T2 Income Tax Return Filing:** Prepare and file required returns accurately and on time.
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Other Services

Additional specialized services to meet unique needs:

- **Certifying Acceptance Agent (CAA) Services:** Facilitate U.S. ITIN and EIN applications as a certified acceptance agent.
- **RC199 Voluntary Disclosure Program Applications:** Declare previously unreported income under CRA's VDP to minimize penalties.
- **Tax Residency Certificates:** Obtain official certificates to support treaty benefits or tax filings abroad.
- **T1 Personal Income Tax Returns:** Preparation and filing for individuals, including cross-border taxpayers.
- **T3 Trust Income Tax Returns:** Filing of trust returns, including estates and inter vivos trusts.
- **Specialized Tax Return Filings (s.216, s.217):** Prepare and file elections under special provisions for non-residents to achieve favourable tax treatment.

India Services

Doing business or managing taxes in India involves a complex framework of laws and regulatory bodies. With decades of on-the-ground experience, our team provides seamless support to foreign investors, non-resident individuals, and Indian businesses alike - ensuring full compliance, optimised tax positions, and strategic insights for growth.

Foreign Services

We assist foreign companies and non-residents with their Indian tax and regulatory obligations, ensuring compliance and minimising tax exposure:

- **Double Tax Avoidance Agreement (DTAA) Analysis:** Evaluate treaty provisions to avoid double taxation on the same income.
 - **Transfer Pricing Audit:** Review and certify related-party transactions to meet Indian transfer pricing regulations.
 - **Residency Status Determination:** Establish your correct Indian residency classification for tax purposes.
 - **Foreign Tax Credit Planning:** Identify and claim credits for taxes paid abroad to reduce Indian tax liability.
 - **Foreign Income Declaration:** Proper reporting of income earned outside India.
 - **Non-Resident Income Tax Returns:** Preparation and filing of Indian returns for non-residents.
 - **Lower Tax Deduction Certificates:** Secure reduced withholding rates from the Income Tax Department to improve cash flow.
 - **Form 15CA/CB Certification & Foreign Remittance Compliance:** Ensure correct certification and filing for cross-border payments to avoid penalties.
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Business Services

We provide end-to-end solutions for companies operating or investing in India—covering incorporation, compliance, and ongoing support:

- **Virtual CFO Services:** Strategic financial leadership without hiring a full-time executive.
- **Statutory Audits:** Conduct audits under the Companies Act, Income Tax Act, and other applicable laws to ensure full compliance.
- **Internal & Special Audits:** Business review audits, quality assurance audits, and stock audits to strengthen internal controls and operational efficiency.
- **Company Incorporation Services:** Assist with forming private/public companies, LLPs, and other entities.
- **Business Licences:** Obtain Import Export Code, GST registration, MSME registration, EPF, ESI and other required licences.

- **Representation Before Tax Authorities:** Handle matters before the Income Tax Appellate Tribunal (ITAT) and other authorities.
 - **Advance Tax Planning & Computation:** Plan installments accurately to manage cash flow and avoid interest/penalties.
 - **MCA Filings:** File Director KYC, annual returns, and other forms with the Ministry of Corporate Affairs.
 - **Corporate Governance Documents:** Draft bylaws, board/shareholder minutes and resolutions to maintain legal compliance.
 - **GST Litigation & Compliance:** Manage disputes, assessments and filings under the Goods & Services Tax regime.
 - **TDS Compliance:** Ensure proper deduction, deposit, and reporting of tax at source.
 - **Monthly Payroll Processing:** Payslip generation, tax withholding, and issuance of Form 16 for employees.
 - **Bookkeeping & Financial Reporting:** Maintain accurate records for decision making and statutory purposes.
 - **Corporate Income Tax Returns (ITR-3, 4, 5, 6):** Preparation and filing of company and partnership returns.
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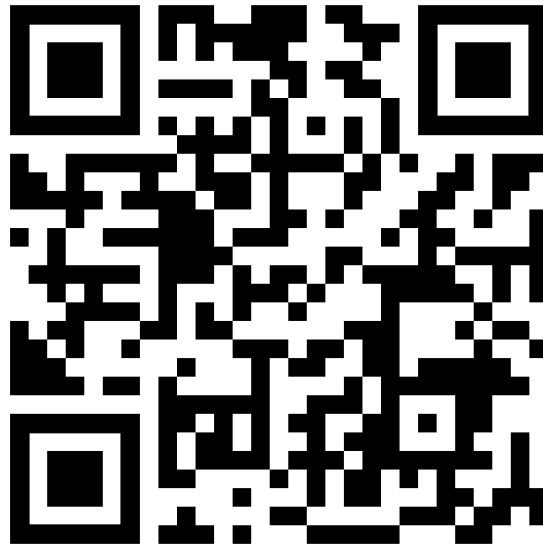
Other Services

Additional support for individuals and trusts:

- **Personal Income Tax Returns (ITR-1, ITR-2):** Preparation and filing for resident and non-resident individuals.
- **Trust Income Tax Returns (ITR-7):** Filing of returns for charitable, religious, and private trusts.

Thank you

We extend our heartfelt thanks for your interest in our company. It is our privilege to serve our clients with the highest standards of excellence and professionalism. To discover more about our services, we invite you to visit our website www.manubhaiCPA.com. Should you require further assistance, our Customer Care team is readily available at +1 (825) 513 3951, or you may email us directly at support@manubhaiCPA.com for a prompt and courteous response.



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