

**Dale Franko CPA, CA, CPA (IL, USA),
TEP**

Director, Canadian Tax Advisory

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“Canadian and US tax law imposes many requirements on individuals and corporations. It’s our job to make sure you balance both sets of requirements while preserving as much as possible for you and future generations.”

Dale is the proverbial duck moving through water. He looks perfectly calm on top, but the precise, purposeful activity going on under the surface is powerful. Dale subscribes to the theory that there is a solution for every problem, you need to think smart, know your facts, and employ creative problem-solving.

Achieving both the CA and CPA designations, his forte is a passion for comparing and contrasting the tax laws amongst various jurisdictions and identifying the similarities and the differences, and how that plays into creating an ideal solution for a client that operates between Canada and the US. He thrives on the challenge of balancing a tax solution with the business vision.

Areas of expertise

- Corporate tax
- Estate planning
- International tax planning
- Personal tax planning
- Tax dispute resolution
- US taxation services

Qualifications:

- Society of Trust and Estate Practitioners, TEP, 2011
- CPA, Advanced Tax Issues for the Owner-Managed Business, 2008
- CPA, Corporate Reorganization, 2007
- CPA, In-Depth Tax Course Part I, II and III, 2004 - 2006
- American Institute of Certified Public Accountants, CPA, 1997
- CPA, CA, 1990

- University of Alberta, B COMM, 1982

Professional affiliations:

- Member – Canadian Tax Foundation
- Member – Institute of Chartered Accountants of Alberta
- Member – Institute of Chartered Accountants of British Columbia
- Member – American Institute of Certified Public Accountants (AICPA)
- Member – AICPA Tax Group
- Member – Society of Trust and Estate Practitioners

Speaking engagements and presentations:

- Presenter – “New T1135 Foreign Income Verification Statement - A Brave New World of Compliance!”, STEP Canada, Toronto, October 24, 2013
- Presenter – “Investing in Canadian real estate”, International Tax Practice Group of Geneva Group International, Miami, June 21, 2012

In the News:

- Dale Franko is quoted in an article titled "Beware these T1135 traps", October 16, 2015, [Advisor.ca](#)
- Dale Franko interviewed regarding the complexities of the Foreign Income Verification Statement (T1135), October 25, 2013, [Advisor.ca](#)