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PROFILE


**Kim G C Moody FCA, TEP**

CEO | Director, Canadian Tax Advisory

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**"People who know me know that I'm only really good at one thing – tax! I'm the guy that carries the Tax Act everywhere, dinner with my wife, hockey games, to bed. At least I started to look a bit cooler once it was available on iPad!"**

The antithesis of the status quo, Kim is driven to innovate new and better ways to do things for the clients he serves, the advancement of the firm, and other professionals in tax. His relentless obsession with getting to know everything in the Tax Act makes him a highly sought-out resource for peers and clients. In March 2020, Kim published his first book, *Making Life Less Taxing: Pay Attention To Your Taxes So You Can Pay Less Tax and Build a Strong, Smarter Canada* – an Amazon bestseller in a number of categories.

Kim's primary area of expertise is tax and estate planning for owner-managers of private corporations and executives, particularly those who have entered into the tax complexities that come with being affluent. Though admittedly not one himself, Kim works with many professional athletes (a guy has got to dream after all). Kim also has expertise in trust and estate taxation and enjoys solving the complexities that arise in developing a well-thought-out estate and succession plan and dealing with testamentary taxation matters.

Deciding years ago that sleep was highly overrated, Kim makes time to share his immense knowledge through writing, lecturing, teaching, and being an active, national leader in the tax profession. In 2016, he fulfilled his long-standing goal of receiving admission into law school and is currently exploring ways to fit this ambition into his busy schedule.

Kim's unique ability is being a loyal, transparent, and honest intellectual rebel who always does the right thing. His passion to lead, teach, never settle, and both seek and speak the truth aid in his contributions to the tax landscape. Kim desires to be an inspirational example for those around him to continuously grow.

## 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, 1998
- CPA, In-Depth Corporate Reorganization, 1998
- CPA, In-Depth Tax Program, 1995
- Chartered Professional Accountants of Alberta, CPA, 1994
- University of Lethbridge, BMgt, 1992

**Professional affiliations:**

- Member – Canadian Petroleum Tax Society
- Instructor – Chartered Professional Accountants of Alberta Professional Development Program
- Co-chair – the Joint Committee on Taxation of the Canadian Bar Association and CPA Canada
- Chair of the Board of Governors – Canadian Tax Foundation, 2012
- Past Chair, Past Deputy Chair of the Board, Past Treasurer and Past Chair – Technical Committee, Society of Trust and Estate Practitioners of Canada
- Co-founder – Tax Specialist Group

**Recognition:**

- Recipient – Institute of Chartered Accountants of Alberta, Early Achievement Award, 2005
- Recipient – Fellow of the Chartered Accountants of Alberta, 2013
- Recipient – Society of Trust and Estate Practitioners, Founders Award for Outstanding Achievement, 2013
- Recipient – Business in Calgary's Leader of Tomorrow Award, 2012
- Recipient – Canadian Society of Trust and Estate Practitioners, Volunteer of the Year Award, 2006
- Recipient – Queen Elizabeth II Diamond Jubilee Medal, 2012

**Publications:**

- Author – Making Life Less Taxing: Pay Attention To Your Taxes So You Can Pay Less Tax and Build a Strong, Smarter Canada, Redwood Publishing LLC, 2020
- Co-author – "Surprise! Foreign Affiliate Dumping Rules Coming to a Private Business Near You", TAXTimes, 2019 Issue No. 7, April 12, 2019
- Author – "Proposed CCA Amendments Provide Limited Incentives", by Kim G C Moody, Volume 19, Number 1, January 2019, Tax for the Owner-Manager
- Author – "Morneau's fall fiscal update disappoints on tax competitiveness", December 6, 2018, Kim G C Moody, The Globe and Mail
- Author – "Penalty!", October 2018, Kim G C Moody, STEP
- Editor – "A collection from the STEP Canada/CRA Roundtables 2004-2017", Edited by Michael Cadesky and Kim G C Moody, Wolters Kluwer Canada 2018
- Contributor – "Legislative Proposals to Address Income Sprinkling Released December 13, 2017", The Joint Committee on Taxation of The Canadian Bar Association and Chartered Professional Accountants of Canada, March 8, 2018

- “The Paradise Papers: A Slippery Slope”, January 2018, Kim Moody, STEP Inside

- “Private Corporation Announcements, October 16-20, 2017", January 2018, Kim G C Moody, Canadian Tax Foundation

- Author – "The Income-Splitting Proposals", Canadian Tax Foundation, October 12, 2017
- Contributor – "Tax Planning Using Private Corporations – Tax on Split Income and Limitation of Lifetime Capital Gains Deduction Proposals ", The Joint Committee on Taxation of The Canadian Bar Association and Chartered Professional Accountants of Canada, October 2, 2017
- Co-author – "Income splitting: Is it time to re-visit a 1966 Canadian tax reform idea?", Tax Times, August 25, 2017
- Co-author – "Kim Moody and Kenneth Keung: Canada's tax proposals read like a class-warfare manifesto against private businesses", Financial Post, August 16, 2017
- Contributor – "Federal Budget 2017 - Proposed Amendments to Taxation of Work In Progress (“WIP”) for Professionals", The Joint Committee on Taxation of The Canadian Bar Association and Chartered Professional Accountants of Canada, May 31, 2017
- Contributor – “ Federal Budget 2016 - Proposed Amendments to Small Business Deduction Entitlement and Transfer of Life Insurance Policies", The Joint Committee on Taxation of The Canadian Bar Association and Chartered Professional Accountants of Canada, August 25, 2016
- Author – “The Saga of Subsection 104(13.4): An Update”, Canadian Tax Foundation, Tax for the Owner-Manager (16:1), January 2016
- Contributor – “The Joint Committee on Taxation of The Canadian Bar Association and Chartered Professional Accountants of Canada”, CPA Canada, October 13, 2015
- Co-author – “Current Cases”, 2014 Prairie Provinces Tax Conference, Canadian Tax Foundation, May 26, 2014
- Author for Conference for Advanced Life Underwriting (“CALU”) Report INFOexchange: Canada’s New Registration on Tax Preparers Program, March 10, 2014
- Author – “Canada’s New Registration of Tax Preparers Program”, March 2014
- Co-author – “U.S. Tax Effects of Canadian Prescribed Rate Loan Strategy”, Tax Analysts, January 20, 2014
- Co-author – “Inter-Provincial Issues of Interest”, British Columbia Tax Conference, Canadian Tax Foundation, September 23, 2013
- Author – “Owner Manager Remuneration - Current Trends, Strategies and Challenges”, 2013 Prairie Provinces Tax Conference, Canadian Tax Foundation, May 28, 2013
- Author – “Tax Future Shock for Small-Firm Practitioners - Dealing with the Fast Pace of Change”, 2012 Prairie Provinces Tax Conference, Canadian Tax Foundation, May 29, 2012
- Author – “Owner-Manager Remuneration Strategies and Structures (89(11) Issues, Investment Income, Non-CCPC Planning, PSB Planning, Private Trust Planning)”, 2011 TSG Conference, Calgary, February 5 - 8, 2011
- Author – “Top 10 Common Income Tax Mistakes Made by Small Business Practitioners - Pitfalls and Fixes”, Wealthy Tortoise Financial Group Inc., May 10, 2011
- Author – “A Pot Pourri Update of Recent Canada and US Tax Matters that Affect Your Clients”, PPI Solutions, Calgary, April 26, 2011
- Author – “The Use of Technology in Today's Tax Practice”, 2011 TSG Conference, Calgary, February 5 - 8, 2011
- Author – “Tax Update, Timely Tax Topics & Traps”, 27th Annual CA Small Practitioners Forum, Banff, November 19, 2010
- Author – “Charitable Tax Planning for Alberta Wealth Holders in 2010 and Beyond”, The Calgary

Foundation, September 22, 2010

- Author – “US Estate Tax Update”, Advocis Calgary, September 16, 2010
- Author – “The New Amendments for Alberta Professional Corporations - Planning Opportunities”, Calgary and Area CMA's in Public Practice, September 15, 2010
- Author – “Taxation Challenges Arising when Charities are Beneficiaries of Estates”, 17th Annual National CAGP-ACPDPTM Conference, Edmonton, May 14, 2010
- Author – “Post Mortem Planning in the Context of the New Eligible Dividend Regime”, Financial Management’s Advanced Planning Forum, Calgary, March 18, 2010
- Author – “Beyond the Basics - Tax Issues in Drafting Wills”, Legal Education Society of Alberta, Calgary, February 24, 2010
- Author – Article for STEP Journal: “Defining Abuse - General Anti-Avoidance Rule”, February 2010
- Author – “Testamentary Tax Issues - General Considerations on Death”, 2009 TSG Conference, Winnipeg, February 1, 2009
- Author – Article for STEP Journal: “Charitable Tax Shelters”, February 2009
- Co-author – “The Restrictive Covenant Proposals - Brain Overload”, Calgary, December 2008. First published by the Canadian Tax Foundation in Report of Proceedings of the Sixtieth Conference, 2008 Conference Report (Toronto: Canadian Tax Conference, 36:1-36:59)
- Author – “Review of Recent Case Law of Interest to Practitioners”, CA Small Practitioners Forum, Banff, November 29, 2008
- Author – “Post-Mortem Tax Planning”, CICA 7th Annual Conference on Income Taxes, Toronto, September 16, 2008
- Author – Article for The STEP Journal – “A Breath of Fresh Air”, April 2008
- Author – “The Eligible Dividend Rules—Not So ‘New’ Anymore”, CA Small Practitioners Conference, Banff, November 2007
- Author – “Planning Issues and Strategies for the Snowbird Client”, Pacific Business and Law Institute, Calgary, June 2007
- Author – “The New Eligible Dividend Rules – A Closer Look”, The Canadian Institute of Financial Planners, Calgary, June 2007
- Author – “The New Eligible Dividend Rules”, STEP Canada National Conference, Toronto, June 2007
- Author – “The New Eligible Dividend Rules”, Calgary and Area Certified Management Accountants in Public Practice, Calgary, June 2007
- Author – “A Closer Look at the New Eligible Dividend Rules”, Legal Education Society of Alberta, Calgary and Edmonton, April 2007
- Author – “A Closer Look at the New Eligible Dividend Rules”, Advocis Calgary, February 2007
- Author – “The New Eligible Dividend Rules & New Distribution Tax for Income Trusts”, 23rd Annual CA Small Practitioner’s Forum, Calgary, November 2006
- Post-Mortem Planning Course – “Testamentary Tax Issues”, Society of Trust and Estate Practitioners 2006 National Conference, Toronto, June 2006
- Author – “Income Tax and Federal Budget 2006 Update”, Advocis Calgary 2006 Sales Congress, Canmore, May 2006
- Author – “Planning for the Global Citizen”, Conference for Advanced Life Underwriting (“CALU”) 2006 Conference, Ottawa, May 2006
- Author – “Alberta Trusts - An Overview”, STEP - Winnipeg Chapter, Winnipeg, May 2006
- Author – “Federal Budget 2006 Update, Recent Issues in Owner-Manager Remuneration Planning and an Introduction to the New Restrictive Covenant Provisions”, Equinox Financial Group, Winnipeg, May 2006
- Author – "Basic Income Tax Considerations When Establishing a US Corporate Presence”, Calgary Chamber of Commerce, Business Expansion into the US Breakfast Seminar, Calgary, May 2006
- Co-author – “Income Trusts: Not Just for Big Business Anymore”, Planning for Profits Income Trust, February 2006

- Author – “Issues that Arise in the Context of the Sale of a Business”, Calgary Young Practitioners Group, Canadian Tax Foundation, Calgary, December 2005
- Co-author – “Tax Planning for Canadian Controlled Private Corporations”, Canadian Tax Highlights, December 2005
- Author – “Employees Profit-sharing Plans”, Article for Conference for Advanced Life Underwriting (“CALU”) Report, December 2005
- Author – “Recent Issues in Owner-Manager Remuneration Planning and an Introduction to the New Restrictive Covenant Provisions”, CA Small Practitioners Conference, Banff, November 2005
- Author – “Owner-Manager Remuneration”, TSG Conference, Vancouver, February 2005

**Speaking engagements and presentations:**

- Presenter – Glencoe Club Speaking Series Webinar – Covid 19 – Government Income Supports – What You Need to Know and Looking Beyond, May 21, 2020
- Presenter – Sage Webinar – Covid 19 – Canada’s Income Support Responses, May 19, 2020
- Presenter – TEC 200 Webinar – Covid 19 – Canada’s Income Support Responses, May 12, 2020
- Presenter – PASC Webinar – Covid-19 – Canada’s Income Support Responses - April 30, 2020
- Presenter – Webinar - Family Wealth Transition: Shifting the Paradigm Part 2 - April 14, 2020
- Presenter – Webinar – Business Survivors Guide to the Pandemic - April 9, 2020
- Presenter – Webinar - “Let’s put the crisis in focus...Go Forward Planning” - April 9, 2020
- Presenter – Webinar - Family Wealth Transition: Shifting the Paradigm - April 7, 2020
- Presenter – The 100 Meter Dash - A Fast-Paced Update on Charitable Giving, Pour Over Trust Planning, and US Tax Considerations That You and Your Clients Need to be Aware Of. – CBA, Calgary, March 11, 2020
- Co-Presenter – Owner-Manager Tax Practice, is there a “Best” Structure – TSG, Toronto, January 19, 2020
- Presenter – New 2019 Government. The Only Constant in Tax is Change. – Scotia McLeod, Calgary, December 5, 2019
- Presenter – The Benefits of Mixing Philanthropy with Wealth Management – CAGP, Calgary, November 21, 2019
- Presenter – A Deep Dive into TOSI: One Year Later Tax Changes with New 2019 Government – STEP Winnipeg, November 19, 2019
- Presenter – Strategic Philanthropy: Are you Missing an Important Role?. Distinguished Advisor Conference. Puerto Vallarta Mexico, November 13, 2019
- Presenter – 9 Days After the Federal Election – Now What? – 8th Annual Tax Update Wealthy Tortoise. Kelowna, October 30, 2019
- Presenter – What’s New in the Tax World? – 2019 CPA Small Business Practitioners Forum. Banff, October 24, 2019
- Presenter – The Evolving Tax Landscape – The Impact to your Clients Business and Wealth. Scotia Wealth, Saskatoon, October 1 & 2, 2019
- Co-Presenter – What you need to know – A Cross Border Tax Update. Edmonton, September 26, 2019
- Co-Presenter – What you need to know – A Cross Border Tax Update. Calgary, September 18, 2019
- Presenter – Strategic Planned Giving, Mount Royal University, September 13, 2019
- Guest Speaker at U of C, Haskayne School of Business, August 30, 2019
- Panelist for AEG Conference, Edmonton, April 11, 2019
- Presenter – Tax Updated Over The Last Year or so That You Should Be Aware Of, RBC – IA Conference Banff, AB, April 3, 2019
- Co-Presenter – Standing Committee on Industry, Science and Technology – House of Commons, February 21, 2019

- Co-Presenter – Being a Tax Professional in 2018 – 70th Annual Tax Conference Vancouver, November 24, 2018
- Presenter 7th Annual 2018 Tax Year in Review – Where to from Here? – Wealthy Tortoise Kelowna, November 15, 2018
- Presenter New Investment Strategies For Corporate Owner-Managers – Distinguished Advisor Conference Quebec, November 13, 2018
- Co-Presenter Year End Planning for Investors and Small Businesses – CE Summit Calgary, November 6, 2018
- Presenter – CGL Strategic Business & Tax Advisors – Income Sprinkling Navigating the Tax on Split Income Changes – Red Deer, AB, October 24, 2018
- Presenter – PPI Internal Conference – One and a Half Years Later – Where Are We At? – Calgary, AB, October 23, 2018
- Presenter – 35th Annual CPA Small Practitioner's Forum – Timely Tax Topics – Banff, AB, October 19, 2018
- Presenter – STEP Silicon Valley – Malpractice, Eh? – Avoiding Disasters in Tax and Estate Planning for Canadian in California – San Jose, CA, October 17, 2018
- Presenter – CPA Ontario Practitioner & Tax Conference – Private Corporation Tax Policy for the Future – What Can We Expect? – Niagara Falls, ON, October 11, 2018
- Presenter – Estate Planning Council - Private Corporation Taxation – A Year in Review and Where Do We Go From Here?, Calgary, AB, October 1, 2018
- Co-presenter – Ways to Minimize Exposure to Canada's Income Tax – COST Conference Chicago, IL, September 27, 2018
- Co-presenter – Understand the Workings of the U.S.-Canada Income Tax Convention, COST Conference Chicago, IL, September 26, 2018
- Co-presenter – C-Suite Executive Cross Border Issues for Tax Directors, COST Conference Chicago, IL, September 26, 2018
- Presenter – Dynamic Live 2018 – Managing New Wealth Eroders – Investment Strategies that address a new era – Calgary, May 10 2018
- Presenter – Dynamic Live 2018 – Managing New Wealth Eroders – Investment Strategies that address a new era - Vancouver, May 9 2018
- Presenter – LESA 51st Annual Refresher – The Private Tax Proposals Saga: Where are we and what Impact will the Changes have on Corporate and Estate Planning – Lake Louise, May 7 2018
- Presenter – Advocis 2018 Advisors Conference – What Should Private Business Owners and Their Advisors Consider – Edmonton, April 19 2018
- Presenter – RBC Private Client Event – 2018 Federal Budget: An Update – Implications to Your Private Company or Family Business and Beyond – Calgary, March 6 2018
- Presenter – Gilby Agricultural Society – Tax Changes for Small Businesses and Farmers – an Overview; Where Do We Go From Here?, February 12, 2018
- Presenter – The Canadian Bar Associations Alberta Branch – Tax Changes for Private Corporations and Shareholders – an Overview; Where Do We Go From Here?, February 5, 2018
- Presenter – Raymond James – Tax Changes for Private Corporations and Shareholders – an Overview; Where Do We Go From Here?, January 25, 2018
- Presenter – "After the Proposals. Where to from here?", Wealthy Tortoise 6th Annual 2017: A Tax Year in Review, Kelowna, BC, November 8, 2017
- Presenter – "July 18, 2017 Private Corporation Proposals: Where are we?", Distinguished Advisor Conference, Kelowna, BC, November 8, 2017
- Presenter – "Evolving Trends in Canadian Tax for Non-Canadian In-House Professionals", Tax Executives Institute, inc. – 72nd Annual Conference, Toronto, ON, October 24, 2017
- Presenter – "Tax Future Shock for Small Firm Practitioners – Dealing with the fast pace of change", CPA Forum North, Jasper, AB, October 23, 2017

- Presenter – "So what are these Private Corporation Proposals all about?", 34th Annual CPA Small Practitioners Forum, Banff, AB, October 20, 2017
- Presenter – "So what are these Private Corporation Proposals all about?", TEC 309, Calgary, AB, October 19, 2017
- Presenter – "So what are these Private Corporation Proposals all about?", TEC/SAGE, Calgary, AB, October 18, 2017
- Co-presenter – "Tax Planning for Canadian Snow Birds", WealthCo, Calgary, AB, October 17, 2017
- Presenter – "So what are these Private Corporation Proposals all about?", VA Angels, Calgary, AB, October 12, 2017
- Co-presenter – "What do the new July 18, 2017 Canadian Private Corporation Tax Proposal Mean to you?", Toronto, ON, September 20, 2017
- Co-presenter – "What do the new July 18, 2017 Canadian Private Corporation Tax Proposal Mean to you?", Edmonton, AB, September 7, 2017
- Co-presenter – "What do the new July 18, 2017 Canadian Private Corporation Tax Proposal Mean to you?", Calgary, AB, August 29, 2017
- Presenter – "Canadian/U.S. Tax Issues that the Private Client Advisor Needs to be Aware of", 2017 Banff Advocis School, August 24, 2017
- Presenter – "July 18, 2017 Proposals Regarding the Taxation of Canadian Private Corporations", 2017 Banff Advocis School, August 23, 2017
- Presenter – "July 18, 2017 Proposals Regarding the Taxation of Canadian Private Corporations", Rotary Club of Calgary, Calgary, AB, August 22, 2017
- Presenter – "Strategies for Business Owners", HUB Financial Presidents Club, Canmore, AB, June 14th, 2017
- Presenter – "US Canada Tax Issues for High Net Worth Clients", Dynamic Funds, Phoenix, AZ, June 4th, 2017
- Co-presenter – "Tax Planning for Canadian Snow Birds", BMO Financial, Phoenix, AZ, March 3rd, 2017
- Presenter – "Tax Implications in Matrimonial Property", Lesa Conference, Calgary, AB, February 22nd, 2017
- Presenter – "Recent Canada/US Tax Updates of Interest", Advocis Calgary, Calgary, AB, February 14th, 2017
- Presenter – "Your Home Away From Home", Calgary, AB, February 8th, 2017
- Presenter – "Canadian Tax Matters of Interest for the International Client", Prime Global Annual Tax Conference, Cabo San Lucas, Mexico, January 6th, 2017
- Presenter – "US LLLP’s", January 16, 2017
- Presenter – "SBD", November 13, 2016
- Presenter – "Tax Year in Review", November 23, 2016
- Panel – "SBD", October 2, 2016
- Panel – "Can You Afford To Sell? Effectively Structuring Your Company for Transition", November 16, 2016
- Presenter – "Canadian and U.S. Tax Considerations on Divorce", October 20, 2016
- Co-presenter – "Should the CRA be Permitted to Access and Use the Collected Data?", March 3, 2016
- Co-presenter – "Owner-manager Remuneration Planning for 2016 and Beyond", Feb 27, 2016
- Presenter – "The New Regime Involving the Taxation of Testamentary Trusts", Feb 17, 2016
- Co-presenter – "Tax Issues on Separation and Divorce", Feb 10, 2016
- Co-presenter – "US/Canada Tax Issues that Immigration Practitioners Should be Aware of", Nov 25, 2015
- Co-presenter – "Canadian and Mexican Neighbors", January 6, 2016
- Co-presenter – "Remuneration – 2016", 2016 TSG Conference, Toronto, ON, January 17, 2016
- Presenter – "Changes to Taxation of Trusts", Estate Planning Council of Abbotsford, Abbotsford, BC,

November 18, 2015

- Instructor – "Income Taxation of Portfolio Investment for Individuals" and "Getting a Grip on RDTOH, CDA & Other Tax Accounts", ICAA, Calgary, AB, November 12, 2015
- Instructor – "Tax Issues in Setting Up A Business", ICAA, Edmonton, AB, November 9, 2015
- Instructor – "Taxation of Domestic Family Trust", ICAA, Calgary AB, November 2, 2015
- Instructor – "Advanced Issues in Estate Planning for Private Corporation Owners", ICAA, Calgary, AB, October 27, 2015
- Instructor – "Advanced Issues in Estate Planning for Private Corporation Owners", ICAA, Edmonton, AB, October 19, 2015
- Co-presenter – "New Developments in the Taxation of Trusts", SmytheRatcliffe, Vancouver, BC, October 15, 2015
- Presenter – "Basic Tax Law - Employee Stock Options", University of Calgary, Calgary, AB, October 7, 2015
- Presenter – "New Developments in the Taxation of Trusts", PFK North America – Canadian Tax Interest Group Fly-in, Vancouver, BC, October 4, 2015
- Co-presenter – "The Top 10 Sexiest Canada/US Tax Issues Every Canadian Insurance Professional Must Know", Canada Life Western National Accounts Meeting, Scottsdale, AZ, September 23, 2015
- Presenter – "What's New in Taxation Affecting the Private Client", The Wealthy Tortoise Group Inc., Kelowna, BC, September 22, 2015
- Presenter – STEP Canada/CA Round Table. STEP 17th Annual Conference, Toronto, ON, June 19, 2015
- Co-presenter – "Canadian Tax Matters of Interest for the International Private Client", U.S. Commercial Service Breakfast Business Briefing, Calgary, AB, June 10, 2015
- Co-presenter – "Canadian Tax Matters of Interest for the International Private Client", U.S. Commercial Service Breakfast Business Briefing, Calgary, AB June 1, 2015
- Presenter – "Tax Technology - Apps and Other Stuff That Improves a Tax Professional's Productivity", 2015 Prairie Provinces Tax Conference, Calgary, AB, June 1, 2015
- Presenter – "What's New In The Zoo? New Developments in the Taxation of Trusts", STEP Calgary Annual Branch Meeting & Seminar, Calgary, AB, May 27, 2015
- Co-presenter – "The Recent Changes to Trusts That Affects Spousal, Alter Ego and Joint Partner Trusts" RBC Wealth Management, Vancouver, BC, May 15, 2015
- Co-presenter – 2015 Tax Update for Professionals, Edmonton, AB, May 12, 2015
- Instructor – "New Developments in the Taxation of Trusts", 48th Annual Refresher: Wills & Estates, Banff, AB, April 20, 2015
- Co-Presenter – 2015 Tax Update for Professionals, Vancouver, B.C., April 1, 2015
- Co-Presenter – "Common Tax Issues For Practitioners To Be Aware Of" , Entrepreneurial Chartered Accountants of Calgary, March 18, 2015
- Co-Presenter – “A Discussion of Issues and Opportunities for X-Border Families” – New York State Bar Association & STEP USA, 11th Annual International Estate Planning Institute, March 12, 2015
- Presenter – "Technology for Tax Practice", 2015 TSG Conference, Calgary, AB, January 20, 2015
- Co-Presenter – "Unusual Entities", 2015 TSG Conference, Calgary, AB, January 19, 2015
- Co-Presenter – “Changes to Trust and Estate Taxation”, CTF Edmonton Young Practitioners Group, December 16, 2014
- Co-Presenter – “US/Canadian Tax Developments”, STEP Global Congress, Miami, November 6, 2014
- Presenter – “Canadian Estate Planning Issues and Using Canadian Partnerships in International Transactions”, Procopio International Tax Institute 2014, San Diego, October 31, 2014
- Co-Presenter – “Tax Developments – Year In Review”, Wealthy Tortoise Financial Group, Kelowna, BC, October 23, 2014
- Presenter – “Tax Development – A Year In Review”, CPA National Conference on Income Taxes for

SMPs, Toronto, October 6, 2014
- Presenter – “Globalization and Cross Border Issues”, InSight 2014, Banff, Alberta, September 25, 2014
- Co-Presenter – “Tax and Succession Planning Considerations for BC Farmers, Ranchers and Orchardists”, STEP Okanagan Branch, Kelowna, June 25, 2014
- Presenter – “U.S. Investors Abroad – FATCA and Other Compliance Issues: Canada”, 7th Annual U.S. – Latin America Tax Planning Strategies, Miami, June 4, 2014
- Co-Presenter – “Recent Court Decisions”, Canadian Tax Foundation 2014 Prairie Provinces Tax Conference, Saskatoon, May 26, 2014
- Co-Presenter – “Timely US Tax Issues for the Insurance Professional”, CALU – National Conference, Ottawa, May 6, 2014
- Co-Presenter – “Buying and Dying in the United States”, STEP Winnipeg, February 18, 2014
- Co-Presenter – “US-Canada Tax: The Differences That Really Matter”, New York University School of Law, February 7, 2014
- Presenter – “Inter-Provincial Issues of Interest,” Canadian Tax Foundation, British Columbia Tax Conference, September 23, 2013
- Presenter – “Advanced Estate Planning”, Wealth and Estate Planning Symposium 2013, July 16, 2013
- Presenter – “Canadian Tax Matters of Interest for the International Private Client”, GGI North American Regional Conference, May 10, 2013
- Moderator – “CRA roundtable”, Society of Tax and Estate Planners 14th National Conference, Toronto, June 11 to 12, 2012
- Presenter – “US-Canada cross-border tax reporting and estate planning issues”, Society of Trust and Estate Practitioners Silicon Valley Chapter, June 5, 2012
- Presenter – “Tax future shock for small-firm practioners - dealing with the fast pace of change”, Canadian Tax Foundation – Prairie Provinces, May 2012
- Chair – “CRA roundtable”, Canadian Tax Foundation 63rd Annual Conference, Montreal, November 27 to 29, 2011
- Presenter – “A potpourri of tax updates”, 28th Annual CA Small Practitioners Forum, Banff, November 19, 2011
- Presenter – “US tax issues and opportunities”, Canada Life Assurance National Account Meeting, Victoria, September 2011
- Presenter – “Bullet Proof Your Practice from the CRA”, CALU – 20th Annual General Meeting – Conference for Advanced Life Underwriting, Ottawa, May 2, 2011
- Presenter – “A Potpourri Update of Recent Canada and US Tax Matters That Affect Your Clients”, PPI Solutions, Calgary, April 26, 2011
- Presenter – “How to Maximize Wealth by Incorporating Eligible Dividend Strategies”, PPI Solutions, Kelowna, March 17, 2011
- Presenter – “Charitable Tax Planning for Alberta Wealth Holders in 2010 and Beyond”, The Calgary Foundation, September 22, 2010
- Presenter – “US Estate Tax”, Advocis Calgary, September 16, 2010
- Presenter – “The New Amendments for Alberta Professional Corporations – Planning Opportunities”, Calgary and Area CMA's in Public Practice, September 15, 2010
- Chair – “CRA/Finance Roundtable”, STEP Canada 12th National Conference, Toronto, June 8, 2010
- “Taxation Challenges Arising when Charities are Beneficiaries of Estates”, 17th Annual National CAGP-ACPDPTM Conference, Edmonton, May 14, 2010
- Presenter – “US Estate Tax and Canadians”, 2010 STEP Pacific Rim Conference, Santa Monica, CA, May 6, 2010
- Presenter – “Post Mortem Planning in the Context of the New Eligible Dividend Regime”, Financial Management's Advanced Planning Forum, Calgary, March 18, 2010

- Co-Chair – Planning Committee for the Canadian Tax Foundation Prairie Provinces Conference, Calgary, May 2009
- Moderator – "Tax Planning During Difficult Economic Times", CALU AGM, Ottawa, May 2009
- Presenter – "Testamentary Tax Issues – General Considerations on Death", 2009 TSG Conference, Winnipeg, February 1, 2009
- Presenter – "New Restrictive Covenant Rules in Income Tax", STEP Calgary, February 2009
- Presenter – "The Restrictive Covenant Proposals – Brain Overload", Canadian Tax Foundation 60th Annual Tax Conference, Calgary, December 1, 2008
- Presenter – "Review of Recent Case Law of Interest to Practitioners", CA Small Practitioners Forum, Banff, November 29, 2008

**In the News:**

- Kim G C Moody is a featured guest on the Real Talk With Faisal Karmali podcast episode "How To Take Your Service Business From Startup To Nationally Known", May 11, 2020, Real Talk With Faisal Karmali
- Kim G C Moody is a featured guest on the Danielle Smith Show podcast episode entitled "CRA suspending new debt collection", March 24, 2020, Danielle Smith Show
- Kim G C Moody is quoted in an article entitled "How to find out if your business qualifies for the COVID-19 wage subsidy", March 23, 2020, CBC News
- Kim G C Moody is quoted in Canadian Lawyer (pg.65-66), February 2020, Canadian Laywer (Subscription Required)
- Kim G C Moody is quoted in an article entitled "More Tax on Canada's Wealthy Isn't Better, Report Says", January 30, 2020, Tax Notes
- Kim G C Moody is a featured guest on the Danielle Smith Show podcast episode entitled "Business tax credits eliminated in the new Alberta Budget", October 29, 2019, Danielle Smith Show
- Kim G C Moody is a featured guest on the Danielle Smith Show podcast episode entitled "Why does Amazon not pay taxes", July 8, 2019, Danielle Smith Show
- Kim G C Moody is quoted in an article entitled "Canadian Court Sides With Taxpayer on Foreign Asset Reporting", July 5, 2019, Tax Notes
- Kim G C Moody is quoted in an article entitled "CRA provides clarity on the tax on split income" June 10, 2019, Investment Executive
- Kim G C Moody is quoted in an article entitled "CRA steps up the fight | The Canada Revenue Agency has increased its enforcement on many fronts" April 22, 2019, Canadian Lawyer Magazine
- Kim G C Moody is interviewed in a recent video entitled "Your Money Month: Cross-border tax tangles", February 20, 2019, BNN

- Kim G C Moody is quoted in an article entitled "Ottawa sees increase in personal tax revenue thanks to stronger economy, high-income earners", October 19, 2018, The Globe and Mail

- Kim G C Moody is quoted in an article entitled "Canada Has Much to Lose From TCJA, Study Shows", September 13, 2018, Tax Analysts

- Kim G C Moody is quoted in an article entitled "Are CRA auditors biased against wealthy Canadians?", August 30, 2018, Canadian Accountant

- Kim G C Moody is quoted in an article entitled "U.S. Repatriation Tax a 'Nightmare' for Citizens With Canadian Assets", August 18, 2018, Bloomberg BNA

- Kim G C Moody is quoted in an article entitled "'Canada Less Attractive to Investors After TCJA, Report Says" July 24, 2018, Tax Analysts

- Kim G C Moody is quoted in an article entitled "'Canada Urged to Stop Tax Rate Race to the Bottom" July 10, 2018, Tax Analysts

- Kim G C Moody is quoted in an article entitled "'Canada Unlikely to Match U.S. Tax Cut, Despite Manufacturers' Call" June 21, 2018, Bloomberg Tax

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