



Joy A. Bertram,
B.Comm., CPA, CGA,
CPA (VT)

“...incredibly hard-working, very focused, innovative in her approaches...”

“Professional client service at reasonable prices. I have already referred friends and family...”

Income Tax

Dispute Resolution

Contact

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for more information



Joy A. Bertram, CPA

Professional Corporation

Tax Consulting & Dispute Resolution

Joy A. Bertram is a Chartered Professional Accountant, Licensed Certified Public Accountant (USA) and the President of Joy A. Bertram, CPA Professional Corporation. She has completed several professional tax specialty courses including the CICA Tax In-Depth II, CPA In-Depth Tax Issues for Owner Managed Business, CPA In-Depth Tax Dispute Resolution Program, CPA Tax In-Depth Corporate Reorganizations programs of study and holds an Honors Bachelor of Commerce Degree majoring in Accounting.

Over 25 years of Diverse Tax Experience

Joy is uniquely qualified to be a valuable asset to you in meeting your personal and corporate tax needs, familiar with both public practice and CRA perspectives over a 25-year career in Private Industry, Small Firms, International Public Practice Firms, and Canada Revenue Agency (CRA). Firm experience included Canadian Personal & Corporate Tax and U.S. Personal & Corporate Tax. CRA experience included roles as Senior Income Tax Technical Advisor, Rulings Officer (published technical interpretation letters), Appeals Officer, Senior Income Tax Auditor, Large File Auditor and Aggressive Tax Avoidance Auditor at Local and National Offices.

Clients Served

- ❖ **Individuals, Business Owners, CPA Firms, Law Firms & More**
- ❖ **Region:** Not limited - Client Portal for remote work
- ❖ **Basis:** Permanent, Ad-Hoc, Contract, Retainer or Project Basis

Services

- ❖ **Return Preparation:** Personal Returns, Final (Deceased) Returns, Non-resident Returns, Corporate Returns
- ❖ **Tax Dispute Resolution:** Your CRA Liaison/Negotiator to Help You Get Results. Includes CRA Reviews, Audits, Objections, Benefit Recovery, Fairness Requests, Voluntary Disclosures, Collections Issues
- ❖ **Tax Reviews:** Complex T1's, T2's, TOSI, Safe Income
- ❖ **Tax Consulting:** Tax Assistance, Tax Research, Analysis
- ❖ **US Expat Tax:** Consults on Streamlined Procedures & Foreign Bank Reporting Requirements