Crowe Soberman LLP
Member Crowe Global

Karen Slezak, BBA, CPA, CA, CFP, TEP

Karen Slezak Professional Corporation, Partner

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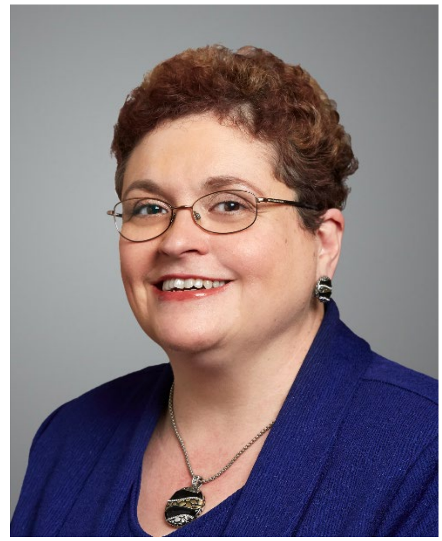
Click here to see my video bio.



Professional Summary

- Karen Slezak is a partner with Crowe Soberman's Tax Group and leads the firm's Estates & Trusts Group. Karen looks beyond meeting the initial requests of her clients and proactively addresses needs that will arise in the future. "I have clients step back from their day-to-day focus to look at their long term goals for retirement, the succession of the business, transfer of wealth and so on. We then look at strategies to get these goals realized."

Experience

- Karen's specialties are many; her vast knowledge allows her to work with clients on most given topics pertaining to their finances, including tax minimization, real estate, tax planning, corporate and partnership restructurings, effective use of family trusts and planning relating to estates, succession and insurance. Karen's client portfolio consists of high net worth individuals and families, entrepreneurs, real estate developers/landlords, professional services firms, and manufacturers. She is also experienced in charitable-gift planning.
- Karen is a frequent speaker at conferences on tax minimization and wealth accumulation strategies for high net-worth individuals. Many of her presentations qualify for continuing education credits. She has authored numerous articles and has appeared on radio shows involving tax planning for individuals. Karen is also a reoccurring guest on Business News Network's Talking Tax program. She is often quoted in major dailies such as The Globe and Mail and the Toronto Star and has provided helpful insights to magazines and trade journals like Report on Business (ROB) Magazine, CAmagazine and Cottage Life.
- Karen is currently Treasurer of Asthma Canada as well as a member of the Planned Giving Advisory Committee of Wellspring. She was previously an instructor for the In-depth Tax Course for the Canadian Chartered Institute of Accountants. She has also served on the boards of a half-way house and children's youth shelter.

Service Focus:

- Charitable gifting
- Corporate reorganization
- Estate & trust planning
- Estate tax and related Filings
- Post-mortem planning
- Succession planning
- Will planning

Industry Focus:

- Privately-held businesses
- Real estate and construction
- Manufacturing, wholesale and distribution
- Professionals
- Investment companies
- Not-for-profit and charitable groups

Professional Affiliations

- Chartered Professional Accountants of Canada (CPA Canada)
- Chartered Professional Accountants of Ontario (CPA Ontario)
- Past President, Estate Planning Council Toronto
- Society of Trust and Estate Practitioners
- Canadian Tax Foundation

Education

- Bachelor of Business Administration (BBA), York University

Community Involvement

- Founding Member and Past President, Midtown Toronto Business Association
- Treasurer, Asthma Canada
- Member, Planned Giving Advisory Committee of Wellspring