

# Corporate Success in the US



Simplifying access to the US market through a series of short, high level presentations highlighting the most important issues to be addressed when considering US expansion including banking, accounting/tax, legal, government incentives, site selection and US government services.

## Who should attend?

- Business owners considering US expansion/planning to do business in the US
- CEO's, CFO's, and others involved in a business planning to expand/do business in the US
- Service providers that advise customers planning to expand/do business in the US

## Benefits of attending:

- Network with other business owners looking to expand to the US or do business in the US
- Connect with cross border service providers from the banking, legal, tax/accounting community
- Connect with cross border consultants with expertise in financing, site selection, government incentives, business development and market research
- Learn from the experiences of a Canadian business that has successfully expanded to the US
- Opportunity to meet Commercial Officers from the US Consulate, Toronto
- Opportunity to meet with a selection of US State economic development representatives including Florida, New York, Virginia, Ohio and Minneapolis/St. Paul

**Event Chair:** Todd Trowbridge CPA, CA – Partner, Trowbridge Professional Corporation

**Registration:** Please register at [Events@trowbridge.ca](mailto:Events@trowbridge.ca) with your name, company, number of attendees and how you heard about the event.

**Cost:** Complimentary, light refreshments served

**Location:** One King West Hotel & Residence  
1 King Street West, Suite 1500 (15<sup>th</sup> Floor)  
Toronto, On M5H1A1

**Map/Directions:** Click here - [One King West Hotel](#)

Tuesday, November 15, 2016

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5:30 -6:00	<b>Welcome Reception</b> Opportunity to network with other business who are considering US expansion
6:00-6:10	<b>Opening Remarks and Introductions</b> <b>Todd Trowbridge CPA, CA, Trowbridge Professional Corporation</b>
6:10-6:25	<b>US Government Assistance Programs</b> <b>Eric Crowley/Shakir Farsakh , Commercial Officers, U.S. Consulate, Toronto</b> Eric/Shakir will discuss the benefits of investing in the US and the ways that the US Consulate can assist your business with US expansion
6:25-6:40	<b>US Cross Border Tax Considerations</b> <b>Lionel Chen, CPA, CA Trowbridge Professional Corporation</b> Lionel will discuss the most vital US cross border tax issues that Canadian businesses need to consider
6:40-6:55	<b>Legal Considerations</b> <b>Andrae Marrocco, LLB</b> Andrae will discuss the key legal issues that Canadian business will need to consider
6:55-7:15	<b>Success in the US – WeedMan USA</b> <b>Jennifer Lemcke, COO, Turf Holdings Inc.</b> Jennifer will talk about the keys to her company's success in taking the Weed Man franchise to the US market and offer insight into how you can learn from their experiences
7:15-7:30	<b>Banking in the US – PNC Bank Canada,</b> <b>David Olsen, Regional President/Principal Officer</b> David will discuss the most significant US banking differences between Canada and the US
7:30-7:45	<b>Government Incentives/Site Selection</b> <b>Marc Beauchamp, VP &amp; Partner, CAI Global Group</b> Marc will discuss the most significant incentives/site selection issues available to businesses looking to expand to the US
7:45-8:00	<b>Questions &amp; Answers</b>
8:00-9:00	<b>Networking Reception</b> Directly connect with the speakers and other service providers that can help your business be successful in the US. They will be available at individual high top tables to speak with you and/or share contact info.

## Our Guest Speakers (in order of presentation):

### **Todd Trowbridge, Partner, Trowbridge Professional Corporation**

Todd is an International Tax CPA, CA by trade and business owner by passion. The Founder of Trowbridge Professional Corporation, he combines solid experience with his predisposition to intuit what private corporations need to do to avoid problems when it comes to International tax and growing a profitable business across borders. Todd has completed levels I, II and III of the Canadian Institute of Chartered Professional Accountants In depth Taxation Program and is a current member of the Canadian Tax Foundation and the Institute of Chartered Professional Accountants of Ontario. He graduated with his Bachelor of Arts degree from the University of Western Ontario, London.

Contact: [todd.trowbridge@trowbridge.ca](mailto:todd.trowbridge@trowbridge.ca)

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### **Shakir Farsakh, Commercial Officer, U.S. Consulate, Toronto**

As a Commercial diplomat, Shakir promotes trade and investment across a wide range of industry sectors to broaden and deepen U.S. Canadian economic relations, with emphasis on the Greater Toronto Area (GTA.) He has provided strategic and tactical advice to small and medium size firms in the aerospace, healthcare and ICT industries for global expansion, resulting in increased sales of \$13.5 million for NY companies in FY 2011. He has also served as U.S. Commercial Service attaché in Morocco and the United Arab Emirates.

Contact: [Shakir.Farsakh@trade.gov](mailto:Shakir.Farsakh@trade.gov)

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### **Eric Crowley, Principal Commercial Officer, U.S. Consulate, Toronto**

Eric is a commercial diplomat with 20 years of experience promoting trade and investment across a wide range of industry sectors mainly in the Greater China region. He has helped thousands of companies generate billions of dollars of business and has been recognized with numerous awards from the U.S. Departments of Commerce and State. Eric's specialties include the promotion of international trade, investment, tourism, and education; trade events; trade missions; international marketing; managing cross-cultural teams; and doing business in Greater China.

Contact: [Eric.Crowley@trade.gov](mailto:Eric.Crowley@trade.gov)

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### **Lionel Chen, Director of US Corporate Tax Services, Trowbridge Professional Corporation**

Since 1997, Lionel has assisted businesses with cross border tax issues successfully navigate the U.S. tax system. He has helped businesses in many different industries, including real estate, technology, entertainment, retail and manufacturing. In addition, he has consulted clients with U.S. businesses on tax efficient structures and reorganizations such as mergers, acquisitions, and divestitures. Lionel obtained his B.A. from the University of Waterloo and his M.S. Tax from Golden Gate University. He is a Chartered Professional Accountant (Ontario) and a licensed Certified Public Accountant (Illinois).

Contact: [lionel.chen@trowbridge.ca](mailto:lionel.chen@trowbridge.ca)

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### **Andrae J. Marrocco, Partner, Dickinson Wright LLP**

Andrae's practice focuses on Franchise & Distribution law and Corporate/M&A law. He has developed particular expertise in providing seamless Canada/US cross border legal advice through Dickinson Wright's unique North American platform to clients conducting business on both sides of the border.

Contact: [amarrocco@dickinsonwright.com](mailto:amarrocco@dickinsonwright.com)

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### **Jennifer Lemcke, COO, Weed Man USA/Turf Holdings Inc.**

Jennifer is responsible for training and supporting Weed Man's 10 U.S. sub-franchisors and 184 licensed franchisees covering over 476 territories across the United States representing over \$93 Million in system sales. Jennifer is highly regarded in the lawn care industry in both Canada and the United States. Her vast experience from the ground up has created a demand for her services as a consultant within the industry and the professional associations affiliated with lawn care.

Contact: [jennifer.lemcke@weedmanusa.com](mailto:jennifer.lemcke@weedmanusa.com)

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**David T. Olsen, Regional President, PNC Bank Canada**

David is an experienced financial services professional with over 20 years in the industry. Working across a broad spectrum of banking in the United States and Canada, David has developed a deep-seeded knowledge of corporate banking, treasury management, business banking, retail banking and risk management. Mr. Olsen has a B. S. from Miami University in Oxford, Ohio and an MBA from Case Western Reserve University in Cleveland, Ohio.

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**Marc Beauchamp, VP and Partner, CAI Global Group**

Marc Beauchamp, A graduate of HEC Montreal where he completed a Master's in Foreign Direct Investment, joined the ranks of CAI in 2005. Mr. Beauchamp seats on different boards including the American Chamber of Commerce - the Ontario Chapter of the American federal organization investment in Toronto - Invest USA and the Quebec chapter of the Canadian Manufacturers' and Exporters' Association.

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*Special thanks the following organizations for their support of this event:*

*U.S. Commercial Service, U.S. Consulate, Toronto*

