



Comprehensive Guide to U.S. Taxes Guelph Residents Need to Know





Intro to Our Canadian & U.S. Tax Services – Guelph

At Larry Stolberg Canadian & U.S. Tax Services – Guelph, Ontario, we provide comprehensive support for both Canadian and U.S. tax matters. Whether you are dealing with complex cross-border tax planning, U.S. tax returns, snowbird filing requirements, or expatriate and appeal services, our team ensures every detail is handled with accuracy.





Estate Planning – Guelph, Ontario

- ✓ Freezes for passing on future appreciation
- ✓ Income splitting (dividends, capital gains, education funding)
- ✓ Shareholder agreements and buy-sell arrangements
- ✓ Wasting freeze-share redemptions (using GRIP)
- ✓ Wills and long-term planning





Post Mortem Planning – Guelph, Ontario

Post mortem planning is essential to minimize tax liabilities after death and protect the value of your estate. Our services include corporate restructuring strategies such as bump and pipeline planning, ensuring assets are transferred in the most tax-efficient manner possible. We also prepare terminal returns and rights-or-things tax returns, helping executors and beneficiaries fulfill obligations while reducing the tax burden on estates.



Corporate Restructuring & Succession Planning – Guelph, Ontario



Creditor proofing and capital gains purification



Employee share acquisitions and shareholder split-ups



GRIP crystallization, loan-back security, purification



Asset spin-offs and capital gains crystallization



IRS Form W-7 Certification – Guelph, Ontario

As certified acceptance agents, we provide specialized assistance with IRS Form W-7 for clients requiring Individual Taxpayer Identification Numbers (ITINs). Many individuals encounter delays and errors when attempting to complete the W-7 on their own, but our certification ensures accuracy and efficiency. We assist non-U.S. persons filing U.S. tax returns such as 1040NR, dependents being claimed on U.S. returns, and individuals filing withholding tax waiver forms like W8-ECI or W8-BEN.





Why Choose Larry Stolberg Canadian & U.S. Tax Services – Guelph, Ontario

With over 30 years of full-time tax practice, Larry Stolberg, CPA, has the experience, expertise, and resources to provide exceptional tax planning services. Specializing in Canadian and U.S. tax matters, our firm delivers solutions tailored to both short- and long-term financial objectives. Whether you require assistance with cross-border tax planning, corporate restructuring, or estate and post mortem planning, our office in the GTA is easily accessible for Guelph residents.



Thank You!



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