

Shefali Patel

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EDUCATION

Accredited Appraiser Canadian Institute

Appraisal Institute of Canada

- Currently on accelerated path to AACI

CHARTERED PROFESSIONAL ACCOUNTANT

- Completed CFE
- Completing CPA Work experience

MASTERS OF TAXATION

University of Waterloo

- Successfully achieved Graduate Diploma in Taxation

RYERSON UNIVERSITY

- Business Management, Accounting Major

WORK EXPERIENCE

Student Member

PPP Appraisals

January 2025 – Current

- Worked under the senior residential appraiser to learn and write residential reports
- Prepared the reports with accuracy, minimal supervision and attention to detail
- Dealt with various kinds of residential appraisal reports including but not limited to condo, townhouse, detached
- Gained proficiency in industry-standard appraisal software and tools.
- Excellent time management skills to handle multiple reports and files

Policyholder Manager

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March 2024 – Current

- Prepare various tax returns including personal and corporate along with various elections for both domestic and international clients
- Complete tax compliance for various entities including calculation of capital gains, recapture and net income
- Perform and draft tax due diligence procedures and reports and tax structuring documents
- Oversee and manage policyholder tax team, providing guidance and support
- Develop and implement tax strategies to optimize policyholder tax positions
- Coordinate and manage tax audits, responding to inquiries and ensuring compliance
- Communicate tax best practices to internal teams and accounting staff

Tax Manager

Various Accounting Firms

January 2017 – February 2024

- Achieve various tax positions across many different firms including KPMG, PwC, MNP and BDO Canada
- Calculate tax liability on dispositions of property, corporation reorganizations, mergers and acquisitions, and business operations from different perspectives including business and shareholders
- Complete tax compliance for various entities including calculation of capital gains and recapture
- Determine Net Income, Income Statement and Balance Sheet for various types of taxpayers
- Work with various lawyers, clients, Canada Revenue Agency and other stakeholders for mergers and acquisitions, corporate reorganizations
- Tax research and various tax planning for all types of taxpayers and communicate the findings via memo
- Able to handle multiple files and clients from start to finish including communicating with all stakeholders to gather information

SKILLS & ABILITIES

- Leadership and teamwork skills which were further enhanced from completing multiple Tough Mudder events
- Strong knowledge of accounting concepts, practices, and procedures
- Effective communication and interpersonal skills by communicating with various involved parties
- Flexible and adaptable to learn new procedures and programs
- Strong time management to handle multiple files
- Strong analytical skills and problem-solving skills
- Hard worker with the ability to multitask and work well under pressure

VOLUNTEER

CHAIR, FINANCE COMMITTEE

Girls Action Foundation

July, 2024 – Current

- Lead financial planning, budgeting, and oversight to ensure fiscal responsibility and sustainability
- Manage financial reporting, monitor cash flow, and ensure compliance with financial regulations
- Helped clean up prior year financial records
- Oversee audits, review financial statements, and maintain transparency in financial operations
- Develop and implement financial policies, controls, and best practices
- Manage donor contributions and funding allocations to optimize resource utilization
- Advise the board on financial strategy, risk management, and long-term financial planning
- Provide leadership in financial governance to support the organization's mission and growth