MILLER THOMSON

Andrew C. Bateman

Associé | **Calgary**

403.298.2419

abateman@millerthomson.com

Biographie

(Disponible en anglais seulement)

Andrew’s practice covers a broad spectrum of taxation law, with a primary focus on private corporations, trusts, family groups and individuals. Areas of focus include transactions and reorganizations, tax dispute resolution and litigation, trust and estate matters, First Nation taxation and goods and services tax.

As a sought-after speaker and writer, Andrew provides insights to respected associations and publications, such as the Canadian Tax Journal, Legal Education Society of Alberta, Canadian Bar Association, Banff CA Small Practitioners Forum and the University of Calgary Faculty of Law.

Before becoming a lawyer, Andrew earned his Bachelor of Commerce and spent 10 years in the franchising industry, where he worked in a number of sales and executive roles. This hands-on experience shaped Andrew’s aptitude for negotiations, strategy, problem solving and conflict management.

Andrew obtained his Juris Doctor degree, from the University of Calgary, and received a number of tax and other academic awards. Prior to joining Miller Thomson, Andrew practiced for 15 years at a boutique tax law firm in Calgary.

Réalisations professionnelles et leadership

- *The Best Lawyers in Canada* – Tax Law, 2024

Leadership éclairé

- Co-Presenter, “Review of Current Tax Cases”, Banff CA Small Practitioners Forum, annually from 2014-2021
- Co-Presenter, "Taxation and Cryptocurrency", Private Presentation, August 2021
- Speaker, "Tax Update: New Trust Reporting Rules", CBA Southern Alberta, June 2021
- Co-Presenter, "The Digital Economy - A Canadian Indirect Tax Update", National Commodity Tax Symposium, October 2019

SERVICES CONNEXES

Fiscalité des entreprises
Règlement de différends fiscaux
Services aux particuliers
Taxes de vente et de consommation et impôt indirect

SECTEURS INDUSTRIELS CONNEXES

Autochtones

- Co-Presenter, “What’s New and What to Anticipate for Private Enterprise Taxation”, Canadian Tax Foundation, Calgary Young Practitioners Group, April 2019
- Speaker, “Effectively Structuring Your Company For Transition”, Business Transitions Forum Calgary, October 2018
- Co-Presenter, "2018 Update on TOSI and Passive Income", CPA Alberta, June 2018
- Presenter, "Family Law Tax Update", CBA Southern Alberta, April 2018
- Co-Presenter, "Commodity Tax Considerations in Corporate Reorganizations and M&A Transactions", National Commodity Tax Symposium, November 2017
- Co-presenter, “Small Business and Private Corporation Tax Update”, Canadian Tax Foundation, Calgary Young Practitioners Group, May 2017
- Co-Presenter, “Small Business and Professional Corporations Tax Update”, Society of Trust and Estate Practitioners (STEP), November 2016
- Co-Presenter, "A Review of Current Cases", National Commodity Tax Symposium, 2016
- Speaker, “Family Law Tax Planning: Swimming in Shark-Infested Waters”, Federation of Law Societies of Canada, National Family Law Program, 2016
- Speaker, “Tax Liability Concerns on Marriage Breakdown”, Family Law Section, CBA Southern Alberta, 2016
- Speaker, “Tax Planning During an Economic Slowdown”, CTF Prairies Tax Conference, 2015
- Speaker, “Review of Marriage Breakdown Tax Considerations”, Taxation Specialist/Family Law Sections, CBA Southern Alberta, 2015
- Speaker, “Drafting Your First Trust: Taxes and Trusts”, LESA Conference, 2015
- Speaker, “Trust Taxation Update”, Wills and Trusts Section, CBA Southern Alberta, 2015
- Author, “Marriage Breakdown: A Practical Review of Income Tax Considerations”, Canadian Tax Journal, 62:4, 2014
- Speaker, “Matrimonial Property Settlements: A Practical Review”, CTF Prairies Tax Conference, 2014
- Speaker, “Tax Issues Related to Matrimonial Property Settlements”, Taxation Non-Specialists, Canadian Bar Association, 2014
- Speaker, “Tax Liability Issues and Matrimonial Disputes”, Alberta Law Conference, January 2014
- Speaker, “Tax Issues on Matrimonial Property Settlements”, LESA Tax Update, May 2013
- Speaker, “Selected Developments Affecting Corporate Reorganizations”, CTF Prairies Tax Conference, 2012
- Speaker, “Tax Issues with Related Party Transactions”, Taxation Non-Specialists, CBA Southern Alberta 2012
- Author, “A Closer Look at Subsection 88(1.5)”, Resource Sector Taxation (Federated Press), 2011
- Author, “Taxpayer Relief Under the Doctrine of Mistake”, Tax for the Owner-Manager, 2010
- Author, “Crown Loses Appeal in Landrus”, Tax for the Owner-Manager, 2009
- Speaker, “Update on Recent Tax Cases”, Taxation Non-Specialists, CBA Southern Alberta, 2009
- Author, “GAAR: No Abuse of the Stop-Loss Rules in Landrus”, Tax for the Owner-Manager, 2008

- Co-Author, “Henley v. R.: Welcome Guidance on Non-Section 7 Stock Options”, Taxation of Executive Compensation and Retirement (Federated Press), 2007

Engagement communautaire

- Past Chair, Young Practitioners Committee (Calgary Section), Canadian Tax Foundation
- Past Chair, Taxation Non-Specialists (Calgary Section), Canadian Bar Association
- Past Council Member, Canadian Bar Association (Alberta)
- Past Committee Member, Membership, Canadian Bar Association (Alberta)
- Past Contributing Editor, Canadian Tax Focus, Canadian Tax Foundation
- Past Sessional Instructor, Basic Tax Law, University of Calgary

Postes d’administrateur

- Board of Directors, Theatre Calgary Endowment Foundation
- President, Board of Directors, Calgary Winter Club

Associations professionnelles

- Member, Law Society of Alberta
- Member, Canadian Bar Association
- Member, Canadian Tax Foundation
- Member, Canadian Petroleum Tax Society
- Member, International Fiscal Association, Canadian Branch

Formation et admission au barreau

- Alberta, 2007
- Juris Doctor (JD), University of Calgary, 2006
- Bachelor of Commerce (B.Comm), University of Alberta, 1998