

Member Case Study

New referral opportunities and other benefits emerge as a direct result from participating in an MGI Worldwide international webinar, says MGI North America member firm, RINA accountancy corporation from California, USA

MGI North America members Tom Neff, of California-based firm RINA accountancy corporation, USA, and Razik Sarsam of Huron Partners LLP, based in the Greater Toronto area, Canada, recently took time out of their busy schedules to host an MGI Worldwide international webinar. Aimed at Tax Advisors of non-US member firms, the webinar provided valuable information and best practices for fellow members assisting their clients when considering expansion of their businesses into North America.

Titled 'Expanding your business to North America (USA and Canada)', the webinar was well received by members around the world and has already resulted in a new referral opportunity for RINA, demonstrating the benefits of being proactive and participating in international MGI events.

Webinar brings new partnership opportunity with Israeli-based member

Following the webinar, attendee David Attia (from the Israeli-based MGI member firm Knobel Beltzer Soraya & Co) reached out to Tom for assistance in dealing with US tax reporting issues for a number of their clients living in Israel. These individuals are receiving retirement benefits in Israel and the question has been raised as to whether their participation in these plans creates PFIC and/or FBAR and FATCA reporting requirements in the US.

Given RINA's expertise in this area, they are excited to be working with David and creating a partnership with his firm to provide guidance in determining what are the relevant issues which their clients are facing, and to assist in the reporting where needed.

A positive experience that can lead to other benefits

Referral opportunity is one big benefit, but Tom also recognises the other important benefits of getting exposure of his firm from the positive comments he received from fellow members while attending the recent MGI North America conference in Scottsdale, Arizona, USA.

More ideas also exist to leverage this as a marketing opportunity for the firm as a member of MGI in the local marketplace.



"I think it would be great to invite clients and possibly referral sources to these webinars. It would give us great exposure to those that are referring business to us and also strengthen the relationships with our best clients."

Tom Neff, CPA Tax Stockholder International Tax Chair, RINA accountancy corporation, California, USA

MGI Worldwide member firms involved

RINA accountancy corporation
California, USA

Huron Partners LLP
Greater Toronto Area, Canada

Knobel Beltzer Soraya & Co.
Tel-Aviv, Israel



KNOBEL BELTZER SORAYA & CO
C.P.A. (ISRAEL)

Member Case Study from MGI North America

"I think it would be great to invite clients and possibly referral sources to these webinars. It would require much more advance planning, but would give us great exposure to those that are referring business to us and also strengthen the relationships with our best clients," Tom said.

MGI Marketing support provides all the help and assistance you need

MGI Worldwide facilitates the international webinars, implements the event microsite and sends email invitations to promote and capture registrations. International Marketing Director Maxine Brock supports members through the process, with the help in this case from Nancy Damato, MGI North America.

"We could not have done the webinar without Maxine, MGI Worldwide and Nancy, MGI North America, and it was great working with them.

"Maxine provided the PowerPoint template and Nancy helped with some graphics. Both provided feedback on content and helped with formatting. Maxine helped us keep on track in the few months leading up to the webinar by scheduling calls and so on. The whole process was very simple for Razik and me, as we only had to provide the technical content," Tom said.

Advice for members wanting to achieve similar

MGI Worldwide international webinars are a new way for member firms around the world to collaborate, share expertise and learn from each other. They also open opportunities for member firms to talk and work together cross-border, as this member case study demonstrates.

Webinars are run throughout the year, each hosted by a different member firm on a technical or industry topic that is of broad international interest.

"If you think you've got a high level of knowledge about an area that might benefit other MGI members, get in touch with the MGI Worldwide team about hosting your own webinar," Tom said.

Get in touch

If you would like to find out more about taking part in an MGI Worldwide international webinar, are interested in hosting one yourself or simply have a specialist or technical area that you would like to learn more about, please contact maxine.brock@mgiworld.com.

"The entire experience was a positive one and I would be very willing to get involved in more international webinars in the future, especially as I can see that Tom has received a referral as a direct result."

Razik Sarsam, CPA, CA Tax Partner, Huron Partners LLP, Greater Toronto Area, Canada

Thank you to MGI Worldwide member firms:



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Huron Partners LLP is a member of MGI North America located in the Greater Toronto Area, Canada.



About MGI Worldwide

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