

# Getting to Know Bond

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# Message from the President

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*It is my pleasure to invite you to explore your SR&ED journey with Bond Consulting Group.*

*Since early 2005, it has been my goal to operate a firm that delivers the most sophisticated solution to SR&ED claimants. I am proud of our effective 100% success rate on over 3000 SR&ED applications over the past 20 years.*

*We do things differently at Bond. We only hire top talent. Your case will be managed by a highly qualified SR&ED Analyst plus a diverse team of dedicated SR&ED managers.*

*We will take the time to understand your case. We will provide you with our revolutionary SR&ED Evidence Management tool, SR&ED Proof. We will defend your case if selected for audit. And most importantly, we will do everything to ensure that you have the best possible experience, and of course, obtain that all-important SR&ED approval.*

*I look forward to working with you and your company.*



**Julie Bond, The SR&ED Whisperer  
CEO & President**



Julie is one of the top SR&ED policy experts in the country with over two decades of experience in this sector. Julie has personally prepared or supervised well over 3000+ successful SR&ED applications.

Julie's first university degree was a mixed Bachelor of Arts in Astrophysics and Foreign Languages, from the University of Toronto.

Julie's second university degree was an Executive MBA from the Rotman School of Management, part of the University of Toronto.

# Our Story

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Founded in 2005, Bond Consulting Group offers the most sophisticated and comprehensive SR&ED Solution in Canada. We are proud of our very high success rate, almost everything we've prepared over the years has been accepted, the vast majority accepted as filed with no requests from CRA.

**We have presided over thousands of successful SR&ED applications resulting in close to \$200 million in refunds for our clients and counting.**



**RBC Canadian Women Entrepreneur of the Year**, in the start-up category (2009)  
**Canada's Emerging Growth Companies**, Profit Hot 50 (2008, 2009)  
**Canada's Top Women Entrepreneurs**, Profit W100 (2010)



Bond Consulting Group is conveniently located in Toronto, and we serve clients across Canada.

# Management

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Bond's **Management** is dedicated to ensuring the success and approval of the SR&ED claims for our clients.



## **Jennifer Waltho, SR&ED Senior Administrator**

Jennifer is responsible for all administrative and office management tasks including tracking all cases after they are submitted to CRA and ensuring that all SR&ED claims are delivered and received by CRA.



## **Olga Semenova, Operations / Sales Manager**

Olga has over 10 years of diverse sales and management experience. Olga manages the team of SR&ED Assessment Specialists and is responsible for planning, directing, and overseeing Bond's operations activities and special projects.

# Admin Support Team

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Bond's **Admin Support Team** streamlines organizational processes, facilitates marketing initiatives, and ensures strategic communication with Bond clients.



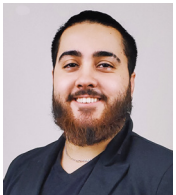
**Jennifer To, HR Coordinator**

With a background in Human Resources functions, including recruitment, retention, training, and administration, Jennifer is responsible for the growth and implementation of all organizational development and culture initiatives at Bond.



**Neha Siddiqui, Marketing Coordinator**

Neha plays a vital role in overseeing all digital marketing strategies and promotional campaigns. With a strong professional background in digital marketing and graphic design, she effectively manages Bond's marketing assets, social media platforms and websites.



**Aidan Vickers, Campaign Coordinator**

Aidan is responsible for planning, executing and supervising all marketing campaigns to ensure they meet Bond's goals and objectives.



**Steffi Thomas, Communication Coordinator**

Steffi holds a Master's in Journalism and Mass Communication. Her expertise in Public Relations and Corporate Communications enables her to provide timely and strategic communications to Bond clients and external partners.



**Olga Vieira, Assistant Bookkeeper & Administrator**

Olga assists with complex Administration support.



**Shawn McKee, Client Relations Specialist**

Shawn is responsible for building client rapport, resolving issues, managing renewals and payment plans. He ensures compliance and maintains accurate records.

# Sales Team

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Bond **Sales Team** is dedicated to providing SR&ED eligibility assessments to our clients.



## **Jonas Sadden, SR&ED Assessment Specialist**

Jonas is our talented SR&ED Assessment Specialist. He is responsible for providing eligibility assessments to businesses that have expressed an interest in participating in the program. Jonas utilizes his background in scientific and medical research, as well as his 5+ years in client communications, to identify eligible projects and expenditures.



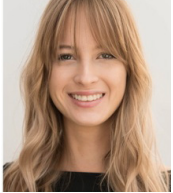
## **Holden Hrysko, SR&ED Assessment Specialist**

Holden is our talented SR&ED Assessment Specialist. He is responsible for providing eligibility assessments to businesses that have expressed an interest in participating in the program. Holden utilizes his background in biology and plant sciences, as well as a year of client communications, to identify eligible projects and expenditures.

# Department Support Team

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Bond's **Department Support Team** is dedicated to providing structured guidance and compliance assistance to Bond analysts and clients.



## **Ana Suka, Department Coordinator**

Ana provides supervision and structured guidance to Bond Analysts to ensure policies, procedures, and quality control measures are followed in the submission of every claim. She is a vital member of the Bond team.



## **Linda Ton, Department Assistant**

Linda supports the Department Coordinator and Senior Partners with administrative tasks and quality control. She ensures compliance by reviewing key documents and technical reports.



## **Zlata Jobs, Evidence Coordinator**

When a case is selected for SR&ED audit, Zlata works diligently with our clients to collect, organize, and deliver appropriate supporting evidence and policy arguments to CRA. She acts as our vital liaison between clients and the CRA, during processes of audit, appeals, and Tax Court of Canada.



# Analyst Team

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Bond has a solid **Team of Scientists, including Medical Specialists, Technologists, and Engineers** on staff (no freelancers), versed in a myriad of scientific, medical, technological, and engineering sectors. When we assign a consultant to your case, he or she will be well-positioned to understand your technology, science, medicine, and business.



## **Ganon Nathan, Senior Bond Partner, SR&ED Medical Analyst**

Ganon joined Bond Consulting with extensive experience in the healthcare industry. With a Medical Degree, he adds clear understanding of clinical research and development. Ganon's data collection and analysis skills make him a wonderful asset to our team, preparing SR&ED claims with excellent efficiency.



## **Eli Vigneron, Senior Bond Partner, SR&ED IT & Applied Mathematics Analyst**

Eli holds a master's degree in Mathematics with over 7 years of combined research and education experience in the fields of Mathematics and Computer Science. His attention to detail and ability to analyze and present complex data enable him to prepare high-quality SR&ED claims.



## **Stephanie Klas, Senior Bond Associate, SR&ED Multi-Disciplinary Analyst**

Stephanie has become a veritable SR&ED expert after working closely with Bond clients for over 3 years. Stephanie is detailed oriented and client focused. She has gained broad knowledge and is therefore considered one of our top Multi-Disciplinary SR&ED Analysts.



## **Miranda Fowler, Senior Bond Associate, SR&ED Medical Analyst**

Miranda joined Bond Consulting after dedicating several years of her career in the pharmaceutical sector. Prior to joining Bond, she gained invaluable experience with medical professionals. Miranda's background in the pharmaceutical and medical field allows her to produce high-quality SR&ED claims for Bond clients.



## **Riad Houha, Senior Bond Associate, SR&ED Medical Analyst**

Riad joined Bond Consulting after several years in the pharmaceutical sector. Before joining Bond, he gained extensive experience in the medical field, including research in renal oncology. His expertise in both the pharmaceutical and medical sectors enables him to deliver high-quality SR&ED claims for Bond's clients.



### **Tyler Vynckier, Bond Associate, SR&ED Agriculture & Multi-disciplinary Analyst**

Tyler has 5 years of technical experience in the environment and conservation sectors. Ranging from governments to private entities, Tyler is highly qualified to prepare SR&ED claims for Bond's clients, leveraging his expertise across diverse industries.



### **Pellumb Jakupi (PJ), SR&ED Industrial Analyst**

PJ holds a Ph.D. in Chemistry with over 10 years of technical experience in industrial sectors. PJ's dynamic background makes him uniquely qualified to prepare a diverse range of high-quality industrial and food development SR&ED claims.



### **Michael Dunphy, SR&ED Multi-Disciplinary Analyst**

Michael spent several years conducting laboratory research on genetic risk factors for cardiovascular disease, before coming to Bond. After spending one year at Bond, as the Scientific Compliance Officer, Michael was promoted to the SR&ED Analyst path. Michael focuses on agriculture and medical claims. Michael is a professional with superior communication skills, and attention to detail.



### **John Tadeo, SR&ED Medical Analyst**

John joined Bond Consulting after several years in the healthcare sector. Before Bond, he built extensive experience in applied health science, collaborating with healthcare leaders across Canada. His background in research and healthcare uniquely positions him to deliver detail-oriented SR&ED claims for Bond's medical clients.



### **Shawn Veitch, SR&ED Medical Analyst**

Shawn joined Bond Consulting after several years of working in the pharmaceutical sector. He has an extensive background in the medical field, including research in cardiology and type 2 diabetes. His expertise in both the pharmaceutical and medical sectors enables him to deliver high-quality SR&ED claims for Bond's clients.

# Core Service

**SR&ED is the largest and most important tax incentive program in Canada.**

SR&ED (Scientific Research & Experimental Development) is the government program that rewards companies that perform R&D in Canada. The program makes Canada a more economically competitive and technologically advanced nation and it has been in existence since the 80's. The Canadian incentive program is one of the most generous R&D programs in the world. **This is not a grant – if you qualify, you are entitled to this money under the Income Tax Act.**

**If you answer yes to any of the following questions you could be sitting on an untapped refund.**

## Scientific Research

- Is your practice incorporated? Do you have a BN?
- Do you practice in a field of medical or scientific specialty?
- Have you ever or would you like to define hypotheses and study clinical data in your field of medicine or science?
- Has your work resulted in advancement of knowledge in a field of science or medicine?
- Have you ever published in medical or academic journals?

**There are only 3 criteria for eligibility plus evidence:**

- Scientific or medical uncertainty
- Scientific or medical advancement
- Systematic investigation
- Technical content and evidence

## Experimental Development

- Have you encountered technological obstacles or uncertainties in the course of your work?
- Have you designed or built any prototypes or custom assets?
- Have you designed or developed any technology that is state-of-the-art?
- Have you solved technological problems by going beyond available practices, methods or routine engineering?
- Have you developed any products that were patented?

**There are only 3 criteria for eligibility plus evidence:**

- Technological obstacle
- Technological advancement
- Systematic investigation
- Technical content and evidence

# Additional Services

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[sredrescue.ca](http://sredrescue.ca)

**Was your last SR&ED Audit a wreck?  
Bond can help you get back on track.**

- Consultation – we provide an opinion on eligibility
- Re-write and amend your SR&ED project descriptions
- Re-evaluate and amend your SR&ED claim
- Collect, organize and submit evidence to CRA
- Attend and represent at SR&ED audits
- Compose and submit SR&ED policy documents and evidence to Chief of Appeals
- Compose and submit SR&ED statement of claim and evidence to the Tax Court of Canada

# Our Process

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Bond Consulting puts you on the right path to understanding Canada's most generous but most complicated corporate tax incentive program.

With our **talented analysts** on staff, **superior in-house expertise**, **government audit experience** and **sophisticated evidence tools**, you can't go wrong.



Initial consultation with an assessment specialist to determine your eligibility



Comprehensive technical interviews with your staff



Scientific report preparation



Detailed analysis of eligible costs



Preparation of all necessary tax forms and filings



Correspondence and reporting to your accountant



Post-preparation tracking of your claim



Regular consultations and strategic reviews



In case of desk audit, or on-site financial / technical audits, we will be right there with you to defend your claim

# Our Brands

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[sredproof.ca](http://sredproof.ca)



[sredbank.ca](http://sredbank.ca)



[sredrescue.ca](http://sredrescue.ca)



[sreddoctors.ca](http://sreddoctors.ca)



[sredclinics.ca](http://sredclinics.ca)



[sredmanufacturing.ca](http://sredmanufacturing.ca)



[sredpharma.ca](http://sredpharma.ca)



[sredfood.ca](http://sredfood.ca)



[sredfarms.ca](http://sredfarms.ca)



[sred-it.ca](http://sred-it.ca)



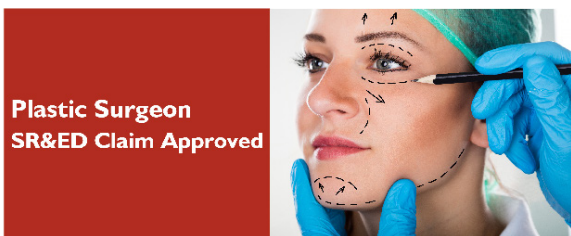
[sredstartup.ca](http://sredstartup.ca)



[sredresearch.ca](http://sredresearch.ca)

# I : Medical Specialties

Most Medical Specialists qualify for the SR&ED Program



## Testimonial

*We've been working with Bond Consulting Group for almost 10 years now. Almost everything we've ever submitted has been accepted as filed, which is a great relief for us. The year that CRA did visit us, Bond was right there with us, to make sure we understood eligibility, and how to respond to CRAs questions. The SR&ED program is so important to us, and we couldn't do it without Bond Consulting.*

***Alijca Wojewnik, President, Dicentra, Natural Health Product Industry.***



## II : Agriculture

Many incorporated Farms qualify for the SR&ED Program

**Winery**  
SR&ED Claim Approved



 *The SR&ED Experts* 

sredfarms.ca

**Apple Farm + Cider**  
SR&ED Claim Approved



 *The SR&ED Experts* 

sredfarms.ca

**Vegetable Farm**  
SR&ED Claim Approved



 *The SR&ED Experts* 

sredfarms.ca

**Vertical Farming**  
SR&ED Claim Approved



 *The SR&ED Experts* 

sredfarms.ca

## Testimonial

*Our experience with Bond Consulting was fantastic. We had heard of SR&ED before, but the task of understanding the program seemed intimidating until we met with them. They made it easy for us to understand and relate to the program. And even though our transaction was small, Bond provided us with a substantial strategic review. The review allowed us to maximize our results with the program. We highly recommend Bond, for any business, large or small. Julie and her team of skilled analysts were professional. Their diligence to our case was evident. They responded to our questions in a timely manner. We are profoundly grateful for the awareness we attained over the past couple of years through Bond. Consistent and top tier; we highly recommend their services.*

**Vincent Sowa, The Meadmaker, *Backed By Bees*, Meadery**



# III : Industrial

## Many Manufacturers qualify for the SR&ED Program

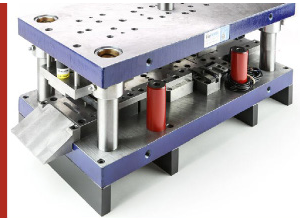
### Chemical Engineering SR&ED Claim Approved



The SR&ED Experts



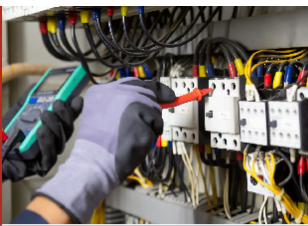
### Tool & Die SR&ED Claim Approved



The SR&ED Experts



### Electronic Engineering SR&ED Claim Approved



The SR&ED Experts



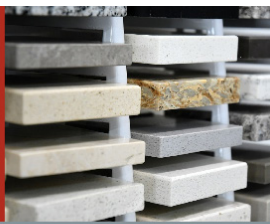
### Millwork and Cabinetry SR&ED Claim Approved



The SR&ED Experts



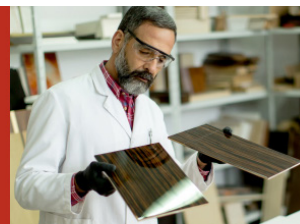
### Solid Surface Manufacturer SR&ED Claim Approved



The SR&ED Experts



### Stone & Tile SR&ED Approved



The SR&ED Experts



## Testimonial

*We made the mistake of leaving Bond Consulting Group once many years ago, thinking that we could save a bit of money. We'll never make that mistake again.*

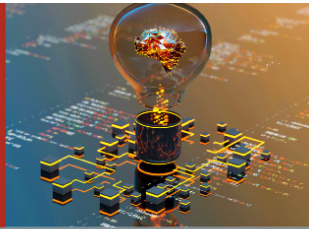
*Our SR&ED claim was denied in full, it was an awful experience. When it comes to dealing with CRA, Julie and her analysts never let us down, we know they're experts and will fight to the end for us.*

**Glen McCarthy, President, Labworks, Industrial Refrigeration Specialists**

# IV: Technology & IT

## Many Tech & IT Companies qualify for the SR&ED Program

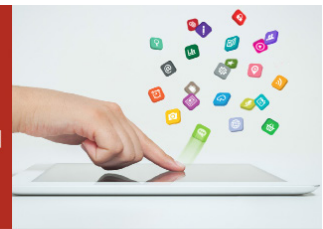
**AI:  
Social Media Platform  
SR&ED Claim Approved**



The SR&ED Experts



**Android Application  
Developer  
SR&ED Claim Approved**



The SR&ED Experts



**Computer Sciences  
SR&ED Claim Approved**



The SR&ED Experts



**Software Engineering  
and Technology  
SR&ED Claim Approved**



The SR&ED Experts



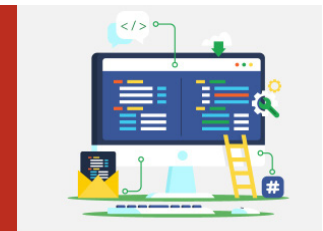
**Applied Mathematics  
SR&ED Claim Approved**



The SR&ED Experts



**IT Development  
Framework  
SR&ED Approved**



The SR&ED Experts



## Testimonial

Hiring Bond Consulting Group was the best SR&ED decision we've ever made. Julie and her team know the program like the back of their hands, and Julie is a veritable SR&ED guru. Our claim before Bond got denied and our consultant did not do much while we were left with having to do almost all the work. Bond was a refreshing change as their team of analysts jump in and do the heavy lifting. Bond has been with us every step of the way when CRA came to visit, and what a relief that was to us.

**Raffi Oshagan, President, Garo Consulting, Software Developers**

# V : Food Developers

Food & Beverage producers often qualify for the SR&ED Program



## Testimonial

*We really enjoyed working with Bond Consulting, their staff provided us with excellent guidance. They led us through the entire SR&ED process and were able to communicate equally well with all members of our team. After discussing our work and documentation with Bond Consulting over two meetings and a few emails they were able to prepare two successful SR&ED claims that were accepted as filed. Their expertise really became evident when they helped us maximize our claim through their proven strategy and knowledge of our industry. Bond Consulting was able to help us recoup valuable money that we are planning to reinvest in our company and product.*

**Kevin Snow, Co-Founder, *Snowman Brewing Co.*, Beverage Industry**



# Bond Client Testimonials



watch our testimonial with  
**Dr. Anastasia Oikonomou**

Cardiothoracic Radiologist,  
Sunnybrook HSC, Scarborough



watch our testimonial with  
**Dr. Shiva Jayaraman**

Pancreatic Surgeon,  
St. Joseph's Health, U of Toronto



watch our testimonial with  
**Dr. Carolyn Nessim**

Oncology Surgeon,  
Ottawa Hospital Research Institute



watch our testimonial with  
**Dr. Evan Lewis**

Pediatric Neurologist, Sick Kids,  
U of Toronto



watch our testimonial with  
**Dr. Maher Obeid**

Doctor of Chiropractic,  
The Healing Path



watch our testimonial with  
**Dave Cloutier**

CEO Kelvin Technologies



watch our testimonial with  
**Behrouz Hariri**

CEO Smart Nora



watch our testimonial with  
**Vincent Sowa**

Co-Founder Backed By Bees



watch our testimonial with  
**Jan VanderHout**

President of Fruit and Vegetable  
Growers of Canada

# No Risk, No Brainer

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If you do not receive a refund  
our services cost you nothing.



**Book a Consultation**

1-888-SRED-007  
416-503-4607

**Call Us**



**E-mail us**

## Stay Connected



[info@bondconsulting.ca](mailto:info@bondconsulting.ca)

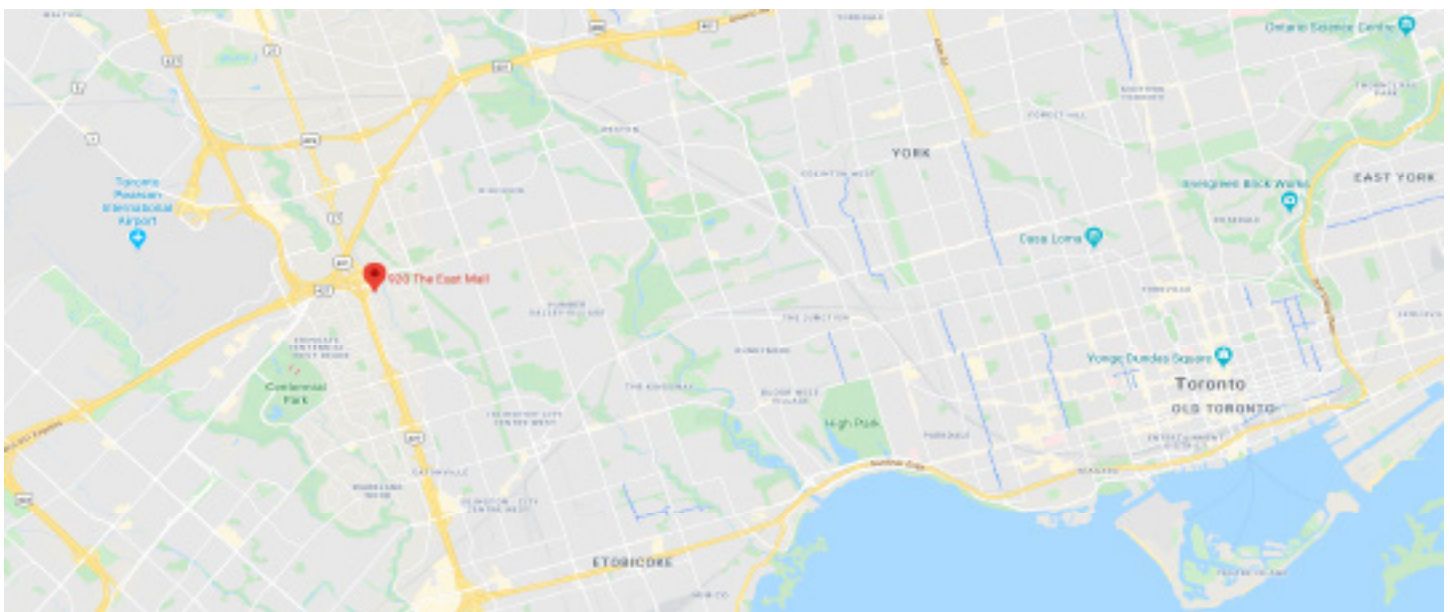
[www.bondconsulting.ca](http://www.bondconsulting.ca)

**Bond Consulting Group Inc.**

920 The East Mall

Toronto, Ontario

Canada, M9B 6K1



# SR&ED Brochures

*Visit*

*Download*

**SR&ED Clinics**

[sredclinics.ca](http://sredclinics.ca)

**Clinics brochure**

**SR&ED Doctors**

[sreddoctors.ca](http://sreddoctors.ca)

**Doctor brochure**

**SR&ED Farms**

[sredfarms.ca](http://sredfarms.ca)

**Farms brochure**

**SR&ED Food**

[sredfood.ca](http://sredfood.ca)

**Food brochure**

**SR&ED IT**

[sred-it.ca](http://sred-it.ca)

**IT brochure**

**SR&ED Manufacturing**

[sredmanufacturing.ca](http://sredmanufacturing.ca)

**Manufacturing brochure**

**SR&ED Pharma**

[sredpharma.ca](http://sredpharma.ca)

**Pharma brochure**

**SR&ED Research**

[sredresearch.ca](http://sredresearch.ca)

**Research brochure**

**SR&ED Start-up**

[sredstartup.ca](http://sredstartup.ca)

**Start-up brochure**

**SR&ED Rescue**

[sredrescue.ca](http://sredrescue.ca)

**Rescue brochure**

# Resources



[List of Eligible Industries](#)



[Video Learning Series](#)



[Official SR&ED website](#)



[SR&ED Q&A](#)



[Bond Blog](#)