

Member Spotlight: Isabella Bertani, FCPA, FCA, MBA

Your trusted advisor for business expansion into Canada



Isabella Bertani is a partner at RSM Canada LLP. She has extensive experience working with private companies, foreign subsidiaries and not-for-profit organizations in numerous industry sectors most notably, manufacturing, food and agriculture, technology, telecommunications, waste management, and retail and distribution.

Isabella is a graduate of York University's Schulich School of Business holding both a Bachelor of Business Administration in accounting and a Master of Business Administration with a focus in policy and finance.

As a high profile audit partner in a global accountancy practice, Isabella Bertani is a role model for young professionals striving for success in a highly competitive industry.

Over a 25-year career, Isabella has risen to the very top of her profession in Canada's largest city Toronto. She was recently bestowed the honour of Fellow by the Chartered Professional Accountants of Ontario (CPA Ontario). The FCPA is the highest distinction that CPA Ontario confers on its members who have brought prestige and honour to the profession through significant achievements in their professional careers, volunteer involvement in the affairs of the accounting profession, and volunteer contributions to the community.

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This is an impressive accolade, and, as a result, she is particularly well qualified to be a mentor to young professionals, a role she takes on in her spare time, away from the office.

Her mentoring advice is characteristically succinct and clear. “Keep a good support network around you at all times and make the choice that’s right for you, understanding that those choices will have ramifications, not only now, but 10 or 15 years from now because of the incredibly fast pace of change and disruption in the world. There is no wrong choice, but it is important to make that choice armed with knowledge and perspective.”

A partner with RSM Canada, Isabella's practice focuses on inbound foreign held companies and Canadian domestic companies with global interests. As a recognized leader in the area of foreign direct investment, Isabella frequently advises foreign corporations globally concerning expansion into the Canadian market and their Canadian operations. Her clients include numerous foreign subsidiaries of significant global entities. Isabella has presented

on topics relating to globalization including global trade and migration, The Canada European Union Comprehensive Economic and Trade Agreement (CETA), global client management, and economic development.

Any business considering global expansion needs to have every possible advantage on its side.

This means starting with the right place. As a G7 country, Canada offers a skilled workforce and excellent infrastructure and telecommunications, and a high degree of public safety. Canada has a banking sector globally known for its stability, and a Top Ten ranking on Transparency International's anti-corruption scale.

Canada has become a popular gateway into North America because of its openness to trade and immigration as well as its competitive tax rates when compared to the United States. Advanced manufacturing and automotive engineering are two key industries in Ontario, particularly along with the Toronto region's technology corridor, which links into several world class universities to provide a highly educated and skilled workforce. Added to this are various government incentive programmes for research and development (R&D), designed to attract hi-tech investment from overseas.

Canada also has complex assurance and tax regulations, legislation designed to prevent money laundering and fraud, detailed workplace legislation and requirements around payroll deductions for employees.

Accordingly, the potential upsides – and the potential hazards – mean that to succeed in Canada, organizations need support from advisors who are familiar with the issues they might face, and what to do about them.

Isabella's practice is already tapping into this potential, using the access to global expertise that the RSM network provides to create a host of

new opportunities to her clients. RSM Canada, the leading global provider of audit, tax and consulting services focused on the middle market, has helped many businesses succeed in Canada. As the Canadian member of RSM International, RSM Canada can leverage more than 41,000 people in over 120 countries. The firm's international 'soft landing' program pulls together a wide range of services, operating in a coordinated way to help businesses gain a smooth entry into the country.

Key to helping businesses succeed is working with someone who understands Canadian business, the needs of international organizations, and has significant experience helping those organizations achieve that smooth landing.

The global nature of modern business is something high on Isabella's agenda, given her focus on inward foreign investment. She references how she now often takes the role of a business advisor, going well beyond the traditional roles of assurance and audit, into strategic advice.

“A key element of our job is assessing risk and the effect investment decisions will have on a business.”

She says: “The new GDPR legislation in Europe is a good example of an area where I need to be abreast of learning about the requirements and engaging with any clients dealing with EU citizens. A key element of our job is assessing risk and the effect investment decisions will have on a business.”

While it is clear that Isabella continues to work hard, bringing her experience to bear in the service of grateful clients, she also takes tremendous pride in giving back to her local community and is dedicated to a number of charitable, professional

and community organizations. She is a passionate advocate for women in business and gender equality, holding several roles in women's leadership. In particular, Isabella is an Ambassador for CPA Canada's Women's Leadership Council, charged with promoting the advancement of women in the accounting profession as well as holding a number of other roles in women's leadership. She has been honoured for her voice in championing women, including most recently in November 2017, by the global organization Women Economic Forum in recognition of her global advocacy for women in business.

Isabella says that in her career, she has received a great deal of help and support from mentors. She now does this herself – with a particular focus of helping young women succeed at the intersection of career, family and personal growth.

“The most rewarding experiences I have had came from my mentorship relationships to foster the next generation of leaders.”

In this, Isabella helps personify one of RSM's key values: stewardship. “I take great pleasure in the work that I do, both professionally as well as through the relationships I foster with young professionals and my community,” she says. “At RSM, stewardship guides the way we engage with and give back to our communities, and I'm proud to play an active part in this. In fact, the most rewarding experiences I have had came from my mentorship relationships to foster the next generation of leaders.”



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RSM's purpose is to deliver the power of being understood to our clients, colleagues and communities through world-class audit, tax and consulting services focused on middle market businesses. The clients we serve are the engine of global commerce and economic growth, and we are focused on developing leading professionals and services to meet their evolving needs in today's ever-changing business environment.