



■ Financial Management and Tax Preparation

Marexx has been created to fill a gap that exists in the personal financial services industry; providing independent, objective and, comprehensive tax and financial management services to individuals. Many individuals become frustrated with fragmented financial advice originating from diverse financial practitioners without regard to personal tax implications.

Marexx provides an integrated approach to your financial management and personal tax requirements. We will ensure that financial management decisions are made in conjunction with future tax implications so there are “no surprises” when preparing your annual tax return.

Marexx is available to help you reduce the anxiety associated with preparing your income tax returns. In fact, Marexx will not only complete your returns and file them, but will utilize our expertise to ensure that you pay the least amount of taxes. Marexx will also provide you with an income tax report summarizing your return and providing advice to reduce future income taxes.

Marexx offers the following personal financial services:

- Personal income tax preparation and filing for individuals with the following incomes:
 - T4 income
 - Pension Income (CPP, OAS, pension and investment income)
 - Self employment income
 - Farming Income
 - Rental Property Income
 - Home based businesses
 - Sales (Real Estate, etc.)
 - Professional
- Tax reduction strategies – individual and family
- Debt reduction strategies
- Financial planning strategies
- Cash flow management
- Budgeting techniques
- University / College funding strategies
- Retirement and estate planning

■ Professional Services

Financial Professional – Mario Serpe MBA, CMA

Mario Serpe has been involved in the financial world for almost 20 years. He has held many senior finance and accounting positions within family owned, small and multi-national corporations. Mario has been preparing individuals' and small business tax returns for over 15 years. He has provided his clients with sound financial advice through effective tax strategies to minimize their overall tax burden.

Mario's academic credentials are notable:

Bachelor of Business Administration

BBA - Schulich School of Business, York University

Master of Business Administration

MBA - Schulich School of Business, York University

Certified Management Accountant

CMA - Society of Management Accountants - Ontario