

Rob Tetrault Clarifies the Distinction Between Holding Companies and Operating Companies

Decoding Companies: Rob Tetrault Explores Holding vs. Operating Firms

WINNIPEG, MB, CA, October 7, 2024 /EINPresswire.com/ -- Rob Tetrault, Senior Senior Fiduciary Portfolio Manager at CG Wealth Management and head of The [Tetrault Wealth Advisory Group](#), offers valuable insights into the [differences between holding companies and operating companies](#). This guidance is essential for business owners and investors aiming to optimize their corporate structure for asset protection, tax efficiency, and business flexibility.



Rob Tetrault is Senior Fiduciary Portfolio Manager at Tetrault Wealth Advisory Group - Canaccord Genuity Wealth Management

Rob Tetrault, a respected wealth management advisor renowned for his strategic philanthropy and commitment to community development, provides a detailed explanation of the primary functions and benefits of operating companies (Opco) and holding companies (Holdco).

Operating companies are engaged in daily business activities, selling products or services, and generating operational income. They pay taxes on profits and are owned by shareholders. This structure is suitable for businesses directly involved in sales and services.

In contrast, holding companies exist mainly to hold shares of other companies or investments such as real estate, stocks, and cash. They provide a layer of asset protection by isolating assets from operational liabilities, allowing for tax-efficient movement of profits from operating companies. Holding companies also offer significant advantages in estate planning, such as leveraging the lifetime capital gains exemption and facilitating estate freezes.

Rob Tetrault emphasizes that holding companies safeguard assets by isolating them from operational risks and liabilities. Transferring profits from an operating company to a holding company can often be done tax-free, allowing for flexible and strategic dividend payments.

Additionally, keeping passive assets and real estate separate helps businesses remain attractive to potential buyers who are primarily interested in the operational aspects of the company.

Rob Tetrault underscores the importance of consulting with investment professionals before making any structural changes to ensure compliance with financial and legal regulations.

For additional information or to book a no-obligation consultation with Rob Tetrault, visit www.speaktorob.com.

About Rob Tetrault:

Rob Tetrault is a respected wealth management advisor known for his strategic philanthropy and commitment to community development. He leads The Tetrault Wealth Advisory Group at CG Wealth Management, focusing on sustainable and impactful giving. Tetrault is dedicated to providing his clients with comprehensive [wealth management solutions](#) tailored to their unique financial needs and goals.

To learn more about the distinctions and benefits of holding and operating companies, watch Rob Tetrault's video on YouTube.

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