Professional Development
We can help you go places

2017/2018
Dear Members,

Welcome to our Fall 2017/Winter 2018 PD Program.

CPABC’s Professional Development Team is excited to present another lineup of courses and programs that cover a wide variety of technical and enabling topics to meet the needs of our diverse membership. Our Fall 2017/Winter 2018 Program offers close to 220 different seminar titles in total, with sessions held across 13 cities in the province. Along with 27 new titles, we are also introducing two new partners in online learning – Corporate Finance Institute and ProDio Audio – whose lineup of web-based seminars will grow our inventory of online offerings.

An exciting development for us beginning this fall is the rebranding of our PD Conference Days to PD Nexus. Now a staple in CPABC’s PD program, our conference days have been consistently well attended and rated for being able to deliver a variety of topics in a concise, timely, and convenient format. Our new brand – PD Nexus – is intended to leverage the meaning of the word “connection.” The Nexus days will be focused on helping members build connections to new knowledge and linkages to new themes, and creating environments where they can network and learn from their peers.

Our upcoming lineup of PD Nexus includes:

- Public Practice Insights (formerly Practitioners’ Potluck) – page 140
- Financial Planning Insights – page 140
- Business Insights (formerly Members in Business & Industry PD Day) – page 159
- Beyond Financial Reporting Insights – page 139

We also continue to provide courses that help members meet their ethics requirements, and have introduced new 4-hour ethics titles into our inventory. Please see page 5 for courses that contain ethics content, and page 24 for information on CPD reporting requirements.

Remember to take advantage of our PD Passports to maximize your savings (see page 21), and register early to ensure your spot in courses that you are interested in attending.

We hope you will find courses that are beneficial and of interest to you in our upcoming program, and we thank you for choosing CPABC’s PD Program as your source for professional development.

Your CPABC PD Team.

PD SEMINAR TERMS & CONDITIONS

PD SEMINAR TERMS & CONDITIONS

REGISTRATION AND CANCELLATION:

To register, complete and return the registration form with payment to the CPABC PD Department. Payment of seminar fees are due at the time of registration, as we do not invoice for seminar registrations.

Cheques should be made payable to CPABC. We also accept Visa and MasterCard, but please DO NOT include your credit card information in any email correspondence. All registrations are subject to GST regardless of employer or employment status.

CONFIRMATION NOTICES: A confirmation notice will be emailed to the registrant within 1 business day upon receipt of registration. Online registrations should generate a confirmation immediately if the transaction was processed successfully. If you do not receive your confirmation prior to the course date, please contact the PD Department. The confirmation notice is provided as a courtesy – all assessments apply whether or not a registrant receives a confirmation notice.

SEMINAR LOCATIONS AND DATES: Seminar locations and dates are subject to change. Every effort is made to ensure that current information is available. Please check the PD website at pd.bccpa.ca for the latest information on the status of seminars.

SEMINAR REGISTRATION CANCELLATIONS, TRANSFERS & REFUNDS: All cancellations and/or transfers must be received in writing. Telephone notifications will not be accepted. Cancellations/transfers received at least 10 calendar days prior to the seminar date will result in a full refund. Cancellations/transfers received less than 10 calendar days but more than 2 full business days prior to the seminar date are subject to an administration fee of $50 for full and half-day seminars, or $25 for executive breakfasts and other 2-hour seminars. Registrants who do not show up for a seminar, and/or who do not notify CPABC PD in writing at least 2 full business days prior to the seminar date are subject to an administration fee of $50 for full and half-day seminars, or $25 for executive breakfasts and other 2-hour seminars. Registrants who do not show up for a seminar, and/or who do not notify CPABC PD in writing at least 2 full business days prior to the seminar date are subject to an administration fee of $50 for full and half-day seminars, or $25 for executive breakfasts and other 2-hour seminars. Registrants who do not show up for a seminar, and/or who do not notify CPABC PD in writing at least 2 full business days prior to the seminar date are subject to an administration fee of $50 for full and half-day seminars, or $25 for executive breakfasts and other 2-hour seminars. Registrants who do not show up for a seminar, and/or who do not notify CPABC PD in writing at least 2 full business days prior to the seminar date are subject to an administration fee of $50 for full and half-day seminars, or $25 for executive breakfasts and other 2-hour seminars. Registrants who do not show up for a seminar, and/or who do not notify CPABC PD in writing at least 2 full business days prior to the seminar date are subject to an administration fee of $50 for full and half-day seminars, or $25 for executive breakfasts and other 2-hour seminars.

If the seminar is cancelled, registrants will be notified by email or phone within 1 week of the seminar date to inform them of the seminar cancellation. Registrants are encouraged to register early to ensure adequate enrolment.

SEMINAR LOAN/RENTAL SUBSTITUTION: In the event of last minute scheduling problems, we reserve the right to substitute a fully qualified speaker who is not listed in the course description.

MEALS: Unless otherwise stated, lunch and coffee breaks are provided at full-day seminars, breakfast is provided only at executive breakfast seminars, and only coffee breaks (not lunch) are provided for half-day seminars. If you have allergies or special meal considerations, please let us know at the time of registration.

CANCELLATION/REFUNDS: CPABC may distribute class lists with your name and organization name at the seminar. Should you wish to opt-out, you must email pdreg@bccpa.ca at least one week prior to the course date.

VIDEO/PHOTOGRAPHY: CPABC may occasionally audio record sessions or take photographs at seminars. Recordings and images may be edited and distributed in educational and promotional products.

WEB-BASED SEMINAR TERMS & CONDITIONS

The registration fees for web-based seminars are payable at the time of registration. CPABC reserves the right to cancel seminars with insufficient enrolment. In such cases, a full refund will be made. Once a registrant receives their Login ID and Password to the web-based seminar, no refunds or substitutions will be granted.

PD PASSPORT TERMS & CONDITIONS

GENERAL CONDITIONS APPLYING TO ALL PD PORTFOLIOS

All 2017/2018 PD Passports are valid on CPABC PD passport valid seminars for the period beginning July 1, 2017 to August 31, 2018. They cannot be used to register for seminars or order products beyond the expiry date. Any unused portions of the PD Passports cannot be refunded, credited, or carried forward.

PD Passports may not be used until payment is received in full, and may not be used retroactively for courses (or products) taken (or ordered) prior to the purchase of the Passport. No further discount program may be used in conjunction with the PD Passports.

The PD Passport Program is valid for CPABC PD-sponsored seminars only. Some CPABC PD programs (e.g. CPABC Executive Programs) are passport invalid. The PD Passport is also invalid towards CPABC conferences that are not organized under the PD Program.

TRANSFERABILITY

Personal PD Passport – not transferable; only the holder can attend seminars using their Personal Passport. Flex PD Passport – this is the only type of PD passport that is fully transferable.

FLEX PD PASSPORT – OFFICIAL CONTACT PERSON

For Flexi Passports, you must designate an individual as your official passport contact person. This individual, and no other, will be authorized to receive information and passport usage, including registration details made under that passport. Individuals who register for seminars using the Flex PD Passport are providing consent to share that information with the official passport contact person of that Flex PD Passport.

SEMINAR CANCELLATIONS

(Applies to all PD Passports)

All cancellations or transfers of registration under PD Passports must be received in writing. Telephone notifications will not be accepted. Cancellations/transfers received at least 10 calendar days prior to the seminar date will not result in a penalty. Cancellations/transfers received less than 10 calendar days but more than 2 full business days prior to the seminar date are subject to an administration fee of $50 for full and half-day seminars, or $25 for executive breakfasts and other 2-hour seminars. Registrants who do not show up for a seminar, and/or who do not notify CPABC PD in writing at least 2 full business days prior to the seminar date are subject to an administration fee of $50 for full and half-day seminars, or $25 for executive breakfasts and other 2-hour seminars. Registrants who do not show up for a seminar, and/or who do not notify CPABC PD in writing at least 2 full business days prior to the seminar date are subject to an administration fee of $50 for full and half-day seminars, or $25 for executive breakfasts and other 2-hour seminars. Registrants who do not show up for a seminar, and/or who do not notify CPABC PD in writing at least 2 full business days prior to the seminar date are subject to an administration fee of $50 for full and half-day seminars, or $25 for executive breakfasts and other 2-hour seminars. Registrants who do not show up for a seminar, and/or who do not notify CPABC PD in writing at least 2 full business days prior to the seminar date are subject to an administration fee of $50 for full and half-day seminars, or $25 for executive breakfasts and other 2-hour seminars. Registrants who do not show up for a seminar, and/or who do not notify CPABC PD in writing at least 2 full business days prior to the seminar date are subject to an administration fee of $50 for full and half-day seminars, or $25 for executive breakfasts and other 2-hour seminars.

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### PD Passports

PD Passports are a great way to save on your professional development training costs! We have a variety of seminars scheduled between September 2017 and August 2018, so consider purchasing a PD Passport to enjoy substantial savings on your PD costs. See page 21 for details.

### Course Levels

To assist members in deciding if a seminar is right for them, a course “level” is included in the course description. A “level” is based on the information the seminar will disseminate and an assumed pre-requisite knowledge of the potential participant.

**Introductory** – the information in the seminar is basic yet thorough. The potential participant does not deal with the topic area on a day-to-day basis, or they may want to ‘refresh’ their knowledge base on the topic. It is assumed the potential participant has limited knowledge on the topic, such as a new handbook section.

**Intermediate** – the information in the seminar builds on the basic topic and tends to be more issue based. The potential participant deals with the topic area on a day-to-day basis and needs to be updated on any changes in the topic area. It is assumed the potential participant has the basic knowledge and is familiar with the issues in the topic area.

**Advanced** – the information in the seminar is in-depth on a specific area of a topic and tends to be more technically specialized. The potential participant deals with the topic area on a day-to-day basis and needs more in-depth information in a specific issue of the topic area. It is assumed the participant has solid background knowledge and is very familiar with the issues in the topic area. They may also specialize or want to specialize in the area.

**General** – the information in the seminar is appropriate for all participants and requires no specific knowledge level or job function. These are often overview or topical sessions of general interest or focus on the development of professional skills.

All seminars are listed on our website at pd.bccpa.ca

For further information, please direct your enquiries to pdreg@bccpa.ca, or call 604 872.7222 and ask for the PD Department.

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Unsubscribe from printed PD catalogue

Our two seasonal PD catalogues (fall/winter and spring/summer) are also available in electronic format on our website. If you do not want to receive printed copies of the catalogues, simply email pdreg@bccpa.ca, and provide your full name and membership number to be removed from the mailing list.
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Verifiable Business Ethics includes learning activities that specifically address business ethics matters. Note that the 4 hour business ethics requirement can be made up in several smaller chunks, for example, partly by a course containing an ethics component and partly by a workplace learning activity containing an ethics component.

The following CPABC PD seminars scheduled in our upcoming fall/winter program contain ethics content. Please see our website for other web-based sessions that may also contain ethics content.

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**Business Ethics – It Starts With You**
Ethics content: 4 hours
Page: 79

**Corporate Governance and Ethics**
Ethics content: 3 hours
Page: 80

**Ethical Principles and the Accounting Profession – CPABC Code Decoded**
Ethics content: 4 hours
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**Shades of Grey – Ethics in the Workforce**
Ethics content: 4 hours
Page: 82

**Understanding and Embracing Ethics in the Workplace**
Ethics content: 4 hours
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**Everyday Income Tax Issues for the General Practitioner**
Ethics content: 0.75 hours
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**Income Tax Issues for the File Preparer**
Ethics content: 0.75 hours
Page: 117

**Tax for Controllers**
Ethics content: 0.5 hours
Page: 125

**The Controller’s Operational Skills Program**
Ethics content: 4 hours
Page: 142

**The CFO’s Operational Skills Program**
Ethics content: 4 hours
Page: 143

Seminar Icons - Legend and Definition

**Title Status** – will indicate if a course title is new, updated, expanded, or carried forward (no major content change).

**Notable Format** – will indicate if the course will be taught in a format other than standard classroom, lecture.

**Required** – will indicate what registrants are required to bring to the class.

**Optional** – will indicate what registrants are encouraged, but not required, to bring to the class.

**Special Feature** – will indicate if the course has any unique features.

**Available Option** – will indicate if the course will also be available in a different option or format.
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Vancouver continued

Nov 07  [E72010S_VA] Ethical Principles and the Accounting Profession: CPABC Code Decoded  8:30am-12:30pm  UBC Robson  80
Nov 07  [A73031C_VA] Budgeting & Financial Management: Beyond Traditional Budgeting  9am-5pm  Hyatt Regency  50
Nov 07  [T73021A_VA] Getting a GRIP on RDTOH, COA & Other Tax Accounts  9am-5pm  Hyatt Regency  113
Nov 07  [E72010T_VA] Ethical Principles and the Accounting Profession: CPABC Code Decoded  1pm-5pm  UBC Robson  80
Nov 08  [A72160B_VA] Introduction to Portfolio and Investment Management Techniques  9am-12:30pm  Sutton Place  133
Nov 08  [C73011C_VA] An End to Manual Effort in Excel: Power Query  9am-5pm  Sutton Place  57
Nov 08  [C73290E_VA] Excel: The Next Level of Skills  9am-5pm  UBC Robson  61
Nov 08  [A73130B_VA] Financing Strategies  9am-5pm  Sutton Place  54
Nov 08  [T73011D_VA] GST/HST: Beyond the Basics  9am-5pm  Hyatt Regency  114
Nov 08  [M73160B_VA] Sharpening Your Business Writing Skills  9am-5pm  Hyatt Regency  75
Nov 08  [T73041B_VA] Tax Issues for Private Corporate Groups  9am-5pm  Hyatt Regency  125
Nov 09  [T71110A_VA] To Be or Not to Be: The Executor – Powers, Obligations and Liabilities  8am-10am  Sutton Place  130
Nov 09  [T2050B_VA] Restructuring Private Corporate Groups  9am-12:30pm  Sutton Place  122
Nov 09  [A73290F_VA] Business Valuations: The Basics  9am-5pm  Four Seasons  51
Nov 09  [M73219C_VA] Communicating Effectively Under Pressure  9am-5pm  Four Seasons  74
Nov 09  [C73010B_VA] U.S. Taxation of U.S. Citizens Living Abroad  9am-5pm  Four Seasons  131
Nov 09  [T7260A_VA] Interest, Penalties and Taxpayer Relief  1:30pm-5pm  Sutton Place  119
Nov 10  [M73140A_VA] Workplace Law: All You Wanted to Know About and Were Afraid to Ask  9am-12:30pm  Sutton Place  105
Nov 10  [A73027C_VA] Enough Bull: How to Retire Well Without the Stock Market  9am-5pm  Sutton Place  132
Nov 10  [A73140B_VA] IFRS: Mineral Resource Exploration & Mining Industry Basics  9am-5pm  Sutton Place  37
Nov 10  [T73110A_VA] RIP: Estate Planning to Minimize Tax Leakage  9am-5pm  Four Seasons  123
Nov 10  [T73230A_VA] Taxation of Domestic Trusts: Advanced  9am-5pm  Four Seasons  128
Nov 14  [M73370D_VA] Communicating with Influence  9am-5pm  Sutton Place  74
Nov 14  [T73170A_VA] Corporate Reorganizations  9am-5pm  Hyatt Regency  111
Nov 14  [T73180B_VA] Income Tax Issues Dealing with Real Estate  9am-5pm  Hyatt Regency  116
Nov 14  [C73140B_VA] Managing Financial Data With Excel  9am-5pm  Sutton Place  68
Nov 14  [T73070A_VA] RIP: Tax Compliance Matters Related to Terminal Filing Preparations  9am-5pm  Sutton Place  123
Nov 15  [T71017A_VA] BC PST Refresher & Comparison with GST/HST  8am-10am  Sutton Place  110
Nov 15  [C7113A_VA] LinkedIn Best Practices for Mid-Level & Senior-Level Finance & Accounting Professionals  8am-10am  Sutton Place  68
Nov 15  [E72051N_VA] Shades of Grey - Ethics in the Workplace  8:30am-12:30pm  UBC Robson  82
Nov 15  [C73012B_VA] Building a Financial Model of a Company  9am-5pm  Sutton Place  57
Nov 15  [T73000M_VA] Income Tax Update 2017  9am-5pm  Sutton Place  128
Nov 15  [M73041A_VA] Resiliency and Grit: You Have What It Takes to Bounce Back from Adversity and Challenge  9am-5pm  Sutton Place  88
Nov 16  [C73080A_VA] Financial Model: Merger Modeling  9am-5pm  Four Seasons  65
Nov 16  [A73270C_VA] Practical Tips for Controllers & CFOs  9am-5pm  Van Conv Ctr West  49
Nov 16  [A73340C_VA] Unveiling the Retirement Myth  9am-5pm  Four Seasons  137
Nov 16  [M73160A_VA] What is Your Happiness Practice? It’s Time to Ditch the Stress and Find Real Happiness  9am-5pm  Four Seasons  89
Nov 16-17  [T74010B_VA] Income Tax Planning Refresher for Corporate Tax  9am-5pm  Van Conv Ctr West  117
Nov 16-17  [A77000A_VA] Local Government Accounting & Auditing Workshop  9am-5pm  Coast Coal Harbour  38
Nov 17  [M73690A_VA] Implementing Change: How to Anticipate and Avoid Costly Problems  9am-5pm  Four Seasons  94
Nov 17  [T73211A_VA] RIP: Estate and Testamentary Trust Returns  9am-5pm  Van Conv Ctr West  122
Nov 17  [A73022E_VA] The Simplest Personal Strategy Ever: Cash Cows, Pigs and Jackpots  9am-5pm  Four Seasons  136
Nov 20  [A73200A_VA] Risk on a One Lane Highway  9am-12:30pm  Van Conv Ctr West  134
Nov 20  [M73320B_VA] An Introduction to Strategy Driven Budgeting  9am-5pm  Van Conv Ctr West  101
Nov 20  [A73111B_VA] ASPE: Related Party Transactions – How Do You Measure Up?  9am-5pm  Van Conv Ctr West  34
Nov 20  [T73060E_VA] Catching Up: 5 Years of Income Tax Developments  9am-5pm  Van Conv Ctr West  110
Vancouver continued

Nov 20  [T730000_VA] Income Tax Update 2017  9am-5pm Van Conv Ctr West  128
Nov 20  [A73190B_VA] NFPOs: A Survey of the Standards (Private Sector)  9am-5pm Van Conv Ctr West  39
Nov 20  [A72012A_VA] Audit Engagements: File Review  1-30pm-5pm Van Conv Ctr West  27
Nov 20-21  [A74050B_VA] IFRS: Disclosure and Presentation - From Standards to Words  9am-5pm Van Conv Ctr West  35
Nov 21  [T73040B_VA] Advanced Tax Planning Strategies  9am-5pm Van Conv Ctr West  109
Nov 21  [A73020B_VA] ASPE: A Comparison to IFRS  9am-5pm Van Conv Ctr West  32
Nov 21  [M73213A_VA] Becoming a High Performance Team Member  9am-5pm Van Conv Ctr West  83
Nov 21  [M73243C_VA] Coach Yourself First  9am-5pm Van Conv Ctr West  85
Nov 21  [M73161A_VA] Creative Thinking for Accountants  9am-5pm Van Conv Ctr West  85
Nov 21  [A73680D_VA] Documenting Your Organization’s Financial Processes  9am-5pm Van Conv Ctr West  45
Nov 21  [M73460A_VA] Project Management: Tips & Traps  9am-5pm Van Conv Ctr West  78
Nov 22  [T72040B_VA] Understanding and Embracing Ethics in the Workplace  8:30am-12:30pm Van Conv Ctr West  82
Nov 22  [A72050I_VA] Assurance & Professional Practice Update  9am-12:30pm Van Conv Ctr West  26
Nov 22  [M73800A_VA] Managing Change and Transformation  9am-5pm Van Conv Ctr West  96
Nov 22  [A73614C_VA] Powerful Financial Analysis  9am-5pm Van Conv Ctr West  48
Nov 22  [T73020B_VA] Tax Planning for Private Enterprises on Business Succession  9am-5pm Van Conv Ctr West  127
Nov 22  [A72410B_VA] Quality Control Manual for Public Practitioners – Canadian Standards of Quality Control (“CSQC 1”)  1-30pm-5pm Van Conv Ctr West  30
Nov 22  [M72161A_VA] When it Hits the Fan: A Primer in Crisis Communications Management  1-30pm-5pm Van Conv Ctr West  77
Nov 23  [T72121B_VA] Life-Interest Trusts as Will Substitutes: The Use and Taxation of Alter Ego Trusts and Joint Spousal or Common-Law Partner Trusts  9am-12:30pm Van Conv Ctr West  120
Nov 23  [A72000A_VA] Public Company Reporting: Annual Update  9am-12:30pm Van Conv Ctr West  41
Nov 23  [A73530C_VA] Audit: Applying Audit Standards to a Small Entity  9am-5pm Van Conv Ctr West  27
Nov 23  [M73035C_VA] Business English for Professionals  9am-5pm Van Conv Ctr West  64
Nov 23  [M73045B_VA] Managing My People  9am-5pm Van Conv Ctr West  96
Nov 23  [T73050A_VA] Scientific Research & Experimental Development Tax Credits  9am-5pm Van Conv Ctr West  124
Nov 23  [T73260A_VA] Tax Returns: Personal  9am-5pm Van Conv Ctr West  128
Nov 24  [A720138B_VA] Wealth Management Tools and Practices  9am-12:30pm Van Conv Ctr West  137
Nov 24  [M73017B_VA] Balancing Your Wheels  9am-5pm Van Conv Ctr West  83
Nov 24  [A73010C_VA] Business Valuations: Beyond the Basics  9am-5pm Van Conv Ctr West  52
Nov 24  [A73090B_VA] Due Diligence for Acquisitions  9am-5pm Van Conv Ctr West  53
Nov 24  [T73291A_VA] GST/HST: Preparing for an Audit  9am-5pm Van Conv Ctr West  114
Nov 24  [A73300C_VA] IFRS: Leases  9am-5pm Van Conv Ctr West  36
Nov 24  [T73201A_VA] Purchase & Sale of a Business: Income Tax & Related Issues  9am-5pm Van Conv Ctr West  121
Nov 24  [T73080A_VA] Section 85: Transfer of Property  9am-5pm Van Conv Ctr West  124
Nov 25  [E72010V_VA] Ethical Principles and the Accounting Profession: CPABC Code Decoded  8:30am-12:30pm Van Conv Ctr West  80
Nov 25  [T73000Q_VA] Income Tax Update 2017  9am-5pm Van Conv Ctr West  128
Nov 25  [E72010W_VA] Ethical Principles and the Accounting Profession: CPABC Code Decoded  1pm-5pm Van Conv Ctr West  80
Nov 27  [C72047A_VA] Advanced Excel Reporting: Best Practices, Tools, and Techniques  9am-12:30pm Sutton Place  56
Nov 27  [M73490E_VA] Becoming a Skilled Negotiator  9am-5pm Hyatt Regency  73
Nov 27  [C72040B_VA] Excel Macros Demystified  1-30pm-5pm Sutton Place  63
Nov 27-28  [A74010D_VA] ASPE: A Survey of the Standards  9am-5pm Sutton Place  32
Nov 28  [M73021A_VA] Handling Termination of Employment  8am-10am Sutton Place  103
Nov 28  [E72030R_VA] Business Ethics – It Starts With You  8:30am-12:30pm Four Seasons  79
Nov 28  [A73611C_VA] Essential Topics for Controllers  9am-5pm Sutton Place  46
Nov 28  [T73080S_VA] Income Tax Update 2017  9am-5pm Sutton Place  128
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<td>Non-Profit Organizations and Registered Charities: Accounting and Taxation Issues</td>
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Dec 11  [C73030C_VA] Data Analysis Expressions with PowerPivot         9am-5pm    Van Conv Ctr West  59
Dec 11  [M73820A_VA] Develop a Culture of Excellence                   9am-5pm    Van Conv Ctr West  91
Dec 11  [T73000W_VA] Income Tax Update 2017                           9am-5pm    Van Conv Ctr West 128
Dec 11  [M73013A_VA] Making Change Stick: Apply Science-Based Methods to Improve Human Performance 9am-5pm    Van Conv Ctr West  95
Dec 11-12 [A74600B_VA] Controllership – A ‘Partner’ for Business     9am-5pm    Van Conv Ctr West  43
Dec 12  [A73050E_VA] ASPE: Disclosure and Presentation - From Standards to Words 9am-5pm    Van Conv Ctr West  33
Dec 12  [M73500C_VA] Clear Thinking/Clear Speaking                   9am-5pm    Van Conv Ctr West  73
Dec 12  [A73681A_VA] COSO Undone: How to Comply with the 2013 COSO and Optimize Your Internal Control 9am-5pm    Van Conv Ctr West  44
Dec 12  [A73631B_VA] Costing & Profitability                         9am-5pm    Van Conv Ctr West  44
Dec 12  [M73930B_VA] Influence and Assertiveness                     9am-5pm    Van Conv Ctr West  86
Dec 12  [C73014C_VA] Rapid Dashboard Development with Power BI Desktop 9am-5pm    Van Conv Ctr West  70
Dec 12  [T72090A_VA] Income Taxation of Portfolio Investments        9am-12:30pm Van Conv Ctr West 119
Dec 12  [C73090C_VA] Googling for Accountants                        9am-5pm    Van Conv Ctr West  67
Dec 12  [M73480C_VA] Leadership and Coaching                        9am-5pm    Van Conv Ctr West  95
Dec 12  [T73000X_VA] Income Tax Update 2017                          9am-5pm    Van Conv Ctr West 128
Dec 12  [M73660E_VA] Sharpening Your Business Writing Skills        9am-5pm    Van Conv Ctr West  75
Dec 12  [A72015A_VA] Auditor’s Responsibility Relating to Fraud (CAS 240) 1:30pm-5pm Van Conv Ctr West  28
Dec 13-14 [A74030B_VA] IFRS: A Survey of the Standards             9am-5pm    Van Conv Ctr West  35
Dec 13  [E72040C_VA] Understanding and Embracing Ethics in the Workplace 8:30am-12:30pm Van Conv Ctr West  82
Dec 13  [T72112A_VA] Current Strategies in Tax Dispute Resolution   9am-12:30pm Van Conv Ctr West 112
Dec 13  [M73000D_VA] Business English for Professionals              9am-5pm    Van Conv Ctr West  84
Dec 13  [T73190A_VA] GST/HST Issues for the Non-Profit Sector       9am-5pm    Van Conv Ctr West 116
Dec 13  [A73500A_VA] Management Accounting Refresher                9am-5pm    Van Conv Ctr West  48
Dec 13  [M72011A_VA] Maximizing Marketability for Mid-Level & Senior Level Finance & Accounting Professionals 9am-12:30pm Van Conv Ctr West  87
Dec 14  [M73530C_VA] Time Management: The Essentials of Productivity Skills 9am-5pm    Van Conv Ctr West  88
Dec 14  [A72010M_VA] Compilation Engagements: Experienced Practitioners 9am-12:30pm Van Conv Ctr West  29
Dec 14  [M73219D_VA] Communicating Effectively Under Pressure        9am-5pm    Van Conv Ctr West  74
Dec 14  [T73150C_VA] GST/HST & Real Property                       9am-5pm    Van Conv Ctr West 115
Dec 14  [A73012B_VA] IFRS: Financial Instruments                   9am-5pm    Van Conv Ctr West  36
Dec 15  [M73940A_VA] Systems Thinking and Resolving Complex Issues in Complex Environments 9am-5pm    Van Conv Ctr West  97
Dec 15  [T73220A_VA] Tax Returns: Corporate                        9am-5pm    Van Conv Ctr West 127
Dec 15  [A72123A_VA] How to Research and Document the Conclusion of an Accounting Issue 1:30pm-5pm Van Conv Ctr West  34
Dec 16  [T73000Y_VA] Income Tax Update 2017                          9am-5pm    Van Conv Ctr West 118
Dec 16  [E72012I_VA] Ethical Principles and the Accounting Profession: CPABC Code Decoded 8:30am-12:30pm Van Conv Ctr West  80
Dec 16  [E72012J_VA] Ethical Principles and the Accounting Profession: CPABC Code Decoded 1pm-5pm Van Conv Ctr West  80
Jan 17  [T73001A_VA] Income Tax Update 2017                          9am-5pm    Sutton Place  118
Jan 24  [A73040D_VA] ASPE: In the Real Estate Industry             9am-5pm    Sutton Place  33
Jan 25  [A72050K_VA] Assurance & Professional Practice Update        9am-12:30pm Sutton Place  26
Jan 25  [A72301A_VA] Money, Marriage and Mayhem                    9am-12:30pm Sutton Place 133
Jan 25-26 [T74020D_VA] Income Tax Planning Refresher for Personal Tax 9am-5pm    Sutton Place  118
Jan 26  [A72010N_VA] Compilation Engagements: Experienced Practitioners 9am-12:30pm Sutton Place  29
Jan 26  [T73320D_VA] Excel: Specific Skills for Budgeting, Planning and Forecasting 9am-5pm    UBC Robson  60
Jan 26  [T73001C_VA] Income Tax Update 2017                          9am-5pm    Four Seasons 118
Jan 26  [A73222K_VA] Review Engagements: Practical Application       9am-5pm    Sutton Place  31
Jan 29  [T71111A_VA] CRA Business Audits and Settlement Strategies    8am-10am    Sutton Place  111
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<td>ASPE: A Survey of the Standards</td>
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## SEMINAR SCHEDULE

### Abbotsford

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**How to register**

- On our secure website at pd.bccpa.ca
- By phone 604 872.7222 (ask for the PD Department)
- By email to pdreg@bccpa.ca (only for registrations with no credit card payments – please do not include credit card information by email)
- By mail to the CPABC 800-555 West Hastings Street, Vancouver, BC V6B 4N6 (Registration form on page 164)

Our Fall/Winter program includes seminars until the end of March. Our Spring/Summer 2018 PD catalogue will be available in March, and will include seminars from May to August 2018.
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### Victoria

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Seminar Locations

**Abbotsford**
Quality Hotel & Conference Centre  
Tel 604 870.1050  
36035 North Parallel Road  
www.qualityhotelabbotsford.com

**Burnaby**
Executive Hotel Burnaby  
Tel 604 298.2010  
4201 Lougheed Hwy  
www.executivehotels.net

**Coquitlam**
Executive Plaza Hotel  
Tel 604 433.3932  
405 North Road  
www.executivehotels.net

**Courtenay**
Best Western Westerly Hotel  
Tel 250 338.7741  
1590 Cliffe Ave  
www.thewesterlyhotel.ca

**Kamloops**
Coast Kamloops Hotel & Convention Centre  
Tel 250 828.6660  
1250 Rogers Way  
www.coasthotels.com

**Kelowna**
Coast Capri Hotel  
Tel 250 860.6060  
1171 Harvey Avenue  
www.coastcaprihotel.com

Ramada Hotel & Conference Centre  
Tel 250 860.9711  
2170 Harvey Avenue  
www.ramadalodgehotelkelowna.com

**Nanaimo**
Vancouver Island Conference Centre  
Tel 250 244-4050  
101 Gordon Street  
www.viconference.com

**Parksville**
Quality Resort Bayside  
Tel 250 248.8333  
240 Dogwood Street  
www.qualityresortparksville.com

**Prince George**
Prince George Civic Centre  
Tel 250 561.7723  
808 Civic Plaza  
www.city.pg.bc.ca

Ramada Prince George  
Tel 250 563.0055  
444 George Street  
www.ramadaprincegeorge.com

**Richmond**
Executive Airport Plaza Hotel  
Tel 604 278.5555  
7311 Westminster Highway  
www.executivehotels.net

**Surrey**
Sheraton Guildford Hotel  
Tel 604 582.9288  
15269 – 104th Avenue  
www.sheratonguildford.com

**Victoria**
Comforth Inn & Suites  
Tel 250 382.4400  
3020 Blanshard Street  
www.comfortvictoria.ca

Delta Victoria Ocean Pointe Resort  
Tel 250 360.2999  
100 Harbour Road  
www.marriott.com/yyvo

Victoria Conference Centre  
Tel 250 361.1000  
720 Douglas Street  
www.victoriaconference.com

Victoria Marriott Inner Harbour Hotel  
Tel 250 480.3800  
728 Humboldt Street  
www.marriottvictoria.com

**Vancouver**
Coast Coal Harbour  
Tel 604 697.0202  
1180 W Hastings Street  
www.coasthotels.com

Four Seasons Hotel  
Tel 604 689.9333  
791 West Georgia Street  
www.fourseasons.com/vancouver

Hyatt Regency  
Tel 604 683.1234  
655 Burrard Street  
vancouver.hyatt.com

Sutton Place Hotel  
Tel 604 682.5511  
845 Burrard Street  
www.suttonplace.com/vancouver

UBC Robson Square  
Tel 604 822.3333  
800 Robson Street  
robonsquare.ubc.ca

Vancouver Convention Centre West  
Tel 604 689.8232  
1055 Canada Place  
www.vancouverconventioncentre.com
Personal PD Passport & Flexi PD Passport

The Personal and Flexi PD Passports are savings programs for members and other professionals taking multiple professional development seminars throughout the year. For the price of a PD Passport, you are entitled to register for 6 days of PD Passport Valid seminars between September 1, 2017 and August 31, 2018 AT NO EXTRA COST. You can mix and match executive breakfasts/briefs (three breakfasts/briefs are equal to 1 day), half-day, one-day, and two-day seminars to equal 6 days of PD training – potentially saving you UP TO 40% OFF SEMINAR PRICES.

The 2017-2018 PD Passports are valid on seminars held to August 31, 2018 only.

Personal PD Passport - $1,650 + GST
Early Bird Price - $1,450+GST
(offer expires September 8, 2017)

For individual, designated CPABC members. This type of PD Passport is non-transferable – only the Passport holder can use it. Substitution of attendees at seminars will not be allowed.

Flexi PD Passport - $2,050 + GST
Early Bird Price - $1,850+GST
(offer expires September 8, 2017)

For company-wide training or simply group savings, anyone can buy it, and anyone can use it. Share the days with employees, colleagues, or clients.

Other benefits with the PD Passport include
• register for PD seminars at any time after your passport purchase
• economical way to meet your CPD reporting requirements – one PD Passport straddles two CPD reporting years
• budget educational activities for the coming year conveniently
• explore new areas of practice at a fraction of the price
• eligible for our web-based seminars as well (see next column)

NOTE: Seminars that are not PD Passport Valid will be clearly marked “PD Passport INVALID”.

Personal & Flexi PD Passports can be used for Interactive Online Seminars & PD AudioWeb titles

We know that some of our members face challenges in attending traditional classroom seminars. We offer these members a way to continue their professional education in a cost effective manner by offering a selection of web-based seminars.

These “to go” sessions allow you to learn what you want, where you want, and at the pace and in the amount of detail you choose. Refer to pages 145 to 152 for a listing of our web-based seminars.

Paperless Offerings at Selected PD Seminars

In response to the growing popularity of e-books and the digital storage of materials, and in trying to conserve print resources, CPABC PD is providing paperless-only offerings for some of our seminars.

Attendees who register for paperless offerings will not receive any printed binders or booklets when they arrive at the course venue. Instead, an email will be sent to registrants 2 business days prior to the course date – this email will contain the web link where registrants can download the materials in PDF format.

How do I access course materials in class?
You have a few options:
• You can download and save the materials onto your laptop or tablet prior to arriving at the course, and then follow along in class with your device – charging stations will be provided (but internet access will not)
• You can choose not to bring anything to the course – we can provide a notepad for note-taking if you wish
• Although we do not encourage this, you can print the PDF file and bring thehardcopy with you to the course

Won’t it be difficult to follow along with no hardcopy material?
We have carefully selected seminars where following along with printed handouts is not an integral part of the training day. These are seminars where handout materials serve more as future reference than in-class necessity. We will continue to provide printed materials for seminars of a more technical nature, where frequent references are made to course notes throughout the day. As well, some portions of a seminar – case studies, worksheets, and last minute handouts – may still work best in printed form.

Where do I download the e-material and how are they formatted?
• You will receive an email with the course link 2 business days prior to the seminar date
• Materials will be provided in a secured PDF electronic format – you can download this to your computer/electronic device
• Materials will be accessible for download only up to one week after course date

Can I download the material during the course?
• Although internet access may be provided on-site at the seminar facility, we strongly recommend that you download and save the PDF file onto your device prior to arriving at the course. We cannot guarantee the speed and quality of internet access at facilities, and we will not be able to provide technical support there should you run into difficulties.

All CPABC PD course materials, either on printed or electronic media, are protected by copyright law. Permission to access and download is granted exclusively to the registered participant of the seminar. Circulation to and use of these materials by individuals other than the registered participant is strictly prohibited.
CPABC PD In-House Presentation Services

Our customized training program is growing every year. CPABC realizes that members work in diverse roles and industries, and that seminars tailored and relevant to you are sometimes difficult to locate.

Possible seminar topics
• Accounting and assurance
• Taxation
• Wealth management
• Leadership and team building
• Personal development
• Information and business technology
• Ethics

Our instructors can work with you to customize the seminars to focus on your specific needs.

Contact us to find out how bringing a class to you makes sense to your business. Email: pdreg@bccpa.ca
IN-HOUSE PRESENTATIONS

Why use our in-house services?

It’s Flexible!
This is your program. It is designed to work around your schedule, which we know can be hectic. We bring the instructor to the location of your choosing, around the schedule you decide works best for your audience.

It’s Customized and Confidential!
We can discuss your requirements and expectations in detail. CPABC, in collaboration with CPA Canada, can either customize an existing seminar or create a seminar specifically for you. You decide who you want in your classroom - your employees, your peers, your clients, your study group, or anyone with common learning goals. When you control who is in attendance, you are able to discuss issues freely, and feel safe to ask questions.

It’s Cost Effective!
Costs vary depending on the size of your group and how much customization is required. The per-person cost is typically less than attending an off-site seminar. Also, by eliminating travel time and travel expenses for your staff, you can significantly decrease training costs.

It’s Easy!
We will find and secure the right instructor for your needs, and will also supply the seminar materials. We can assist with booking meeting facilities if you do not have room at your location. We work with many independent instructors nationwide, and have an exceptional pool of local and national instructors to draw from.

Other benefits
• is great for team-building and achieving organizational results
• provides attendees more interaction with the instructor

Call today to find out how bringing a class on site makes sense to your business. Contact Nicola McLaren, CPA, CA or Kitty Leung at 604 872.7222, toll free in BC at 1 800 663.2677, or email pdreg@bccpa.ca.

Here are what some of our in-house customers have to say:

In-house presentation of PD Program course material provided us with: well prepared material; customization to emphasize areas of particular interest; very knowledgeable instructors; and an economic delivery model that enabled us to include more staff in the learning experience.

Larry Guthrie, Director, Financial Services
Simon Fraser University, Burnaby, BC

With the convenience of in-house PD, we’re able to have more accounting team attend PD, by including team members that wouldn’t normally attend if it were out of town. Our team like it because they are more comfortable asking questions and discussing issues specific to our clients. I think we get more out of the PD because of the discussions that result from those questions. It’s also more convenient to have the course under our roof and to not have to go elsewhere for it. We definitely get more value out of in-house PD courses.

Brenda Kelm, Partner
Presley and Partners, Courtenay, BC

We at Manning Elliott have used the In-House PD Program for a few years now and find that it is an economical and effective way to deliver PD. Additionally, we have reaped an unexpected benefit as having in-house PD courses fosters team building amongst our people.

Keith Elliott, Partner
Manning Elliott LLP, Vancouver, BC

We like the PD In-house program from CPABC because it allows us to include our experience into the course discussion, because it is cost-effective to provide training to a large group of staff members at the same time, and because the course material has already been developed for us. The feedback from our staff is this is their preferred method of professional development.

Peter Cha, Partner
Cinnamon Jang Willoughby, Burnaby, BC

One of Avisar’s objectives is to provide a work environment that is conducive to both personal and professional growth. Greg Campeau was the key person for Avisar’s 2-day offsite CPABC in-house seminar “Leading from Anywhere in the Organization”. He executed on all the deliverables we worked on together to ensure a well-rounded interactive workshop to our leadership group and entire team. Of particular value to us was that the material resonated with us - leadership is everyone’s job – serving people is the highest form of performance.

Cheryl Hipwell, Office Manager
Avisar
Continuing Professional Development (CPD) Reporting Requirements for CPABC Members

Members are reminded of Rule 203 of the Code of Professional Conduct.

Rule 203 – Professional Competence
A member shall sustain professional competence by keeping informed of, and complying with, developments in professional standards in all functions in which the member provides professional services or is relied upon because of the member’s calling.

Minimum CPD Requirements

<table>
<thead>
<tr>
<th></th>
<th>Verifiable Hours</th>
<th>Total Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annual</td>
<td>10</td>
<td>20</td>
</tr>
<tr>
<td>3-Year Rolling Cycle, including 4 hours of verifiable business ethics</td>
<td>60</td>
<td>120</td>
</tr>
</tbody>
</table>

- **Verifiable CPD** includes learning activities, relevant to your professional role, for which there is third party evidence to verify participation in the learning activity.

- **Unverifiable CPD** includes personal reading, on-the-job learning and other ‘self-study’ activities relevant to your professional role for which there is no evidence to verify participation in the learning activity.

- **Verifiable Business Ethics** includes learning activities that specifically address business ethics matters, for which there is third party evidence to verify participation in the learning activity.

**HOW THE 3-YEAR ROLLING CYCLE WORKS**

1. In the first three-year cycle the member completed 40 hours of CPD each year.
2. In the third year of the second cycle the member completed 50 hours of CPD, for a total of 130 CPD hours.
3. To reach the requisite 120 hours for the third cycle, the member would need only 30 CPD hours in 2019.
4. For the fourth cycle, the member would need at least 40 hours in 2020.
5. A member who met the ethics course requirement in 2017 would need to meet the requirement again by 2020, and so on.

**Additional Information**
For further information, please refer to our website at [www.bccpa.ca](http://www.bccpa.ca), or contact:
Lisa Murray, CPD Administrator at 604 488.2614 | e-mail: cpd@bccpa.ca
### Accounting & Assurance

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Assurance & Professional Practice Update
LEVEL Intermediate

Prerequisite
Familiarity with the CPA Handbook – Assurance.

Overview
This seminar is designed to review recent revisions to the CPA Handbook – Assurance and other practice matters.

The focus of the seminar is on new standards issued, with an overview of projects in progress, and a revisit to those standards what will be implemented for the first time in the current cycle. Implementation guidance and basis of conclusions documents issued by CPA Canada and the AASB will also be discussed.

Practice issues identified by practice advisory and/or practice inspection will also be reviewed.

Who Should Attend
Professional accountants who practice public accounting, serving small- and medium-sized entities.

Content
This seminar provides an overview of current developments in assurance standards, including:
• introduction and overview of new standards issued
• specific coverage for new standards for review engagements and the project on the new audit report
• exposure drafts and other projects in process for assurance matters
• practice matters, including a review of practice inspection findings and practice advisory comments

Comments from Past Attendees
“We addressed topics that were of direct use in my line of work.”
"Practical examples." "It’s a good summary of recent changes that allows me to dig deeper into the things that will apply to me directly."

Seminar Leader to be drawn from
Tom Gillespie, CPA, CA
Terry Gunderson, CPA, CA
Diane McDonald, CPA, CA
Bridget Noonan, CPA, CA

Audit: A Survey of Standards with Practical Application
(formerly Auditing Refresher)
LEVEL Introductory to Intermediate

Prerequisite
Familiarity with the CPA Handbook - Assurance.

Overview
Developed with the needs of professional accountants working in public practice in mind, this seminar provides a solid foundation in the practical application of the Canadian Auditing Standards (CAS) to audit engagements. Participants are given an opportunity to build on their understanding of the standards, with an emphasis on areas identified as common pitfalls in national practice inspection findings. Using a case study approach, participants practise applying the standards to a set of client-specific facts.

Who Should Attend
Public practitioners at all levels of experience, who want to refresh their understanding of auditing in the CAS environment.

Content
• audit quality
• communication with others
• key elements of documenting an engagement working paper file
• acceptance & overall audit strategy
• internal control
• risk assessment
• performing audit procedures
• evaluating evidence
• engagement reporting
• a case study based on the audit of a moderately complex for-profit private company

Comments from Past Attendees
“Good reference material and discussions.” "I loved the use of case study to demonstrate how to perform an audit in accordance with CAS.” "Practical examples and explanations.” "Case study application, feedback, and discussion notes were invaluable."

Seminar Leader
Robin Diehl, CPA, CA, CBV

| Oct 24 | 9am-12:30pm | Coast Hotel, Kamloops | [A72050A_KA] |
| Oct 26 | 9am-12:30pm | Sutton Place, Vancouver | [A72050B_VA] |
| Oct 31 | 9am-12:30pm | Ramada Hotel, Kelowna | [A72050C_KA] |
| Nov 03 | 9am-12:30pm | Van Island Conf Ctr, Nanaimo | [A72050D_NA] |
| Nov 07 | 9am-12:30pm | Ramada Hotel, Prince George | [A72050E_PG] |
| Nov 08 | 1:30pm-5pm | Executive Plaza, Coquitlam | [A72050F_CO] |
| Nov 16 | 9am-12:30pm | Quality Hotel, Abbotsford | [A72050G_AB] |
| Nov 17 | 9am-12:30pm | Delta Ocean Pointe, Victoria | [A72050H_VI] |
| Nov 22 | 9am-12:30pm | Van Conv Ctr West, Vancouver | [A72050I_VA] |
| Nov 24 | 9am-12:30pm | Sheraton Guildford, Surrey | [A72050J_SU] |
| Jan 23 | 9am-12:30pm | Sutton Place, Vancouver | [A72050K_VA] |
| Fee $220 | | | |

Dec 04-05 | 9am-5pm | Sutton Place, Vancouver | [A74020B_VA] |
Feb 22-23 | 9am-5pm | Sutton Place, Vancouver | [A74020C_VA] |
Feb 7/8 | 1/2 Passport Day | 2 Passport Days | 14 CPD Hours |

Fee | Passport Valid | Passport Days | CPD Hours |
Audit: Applying Audit Standards to a Small Entity  
(formerly Audit of Small Entities)  
LEVEL Intermediate

Prerequisite  
Familiarity with the CPA Handbook - Assurance.

Overview  
This seminar is designed for professionals who wish to enhance their skills in auditing small entities effectively and efficiently by focusing on key Canadian Accounting Standards (CAS) that are most relevant to small entities. By understanding these standards, the professionals performing the engagement will be able to use the CAS objectives and requirements to drive the audit approach of profit and not-for-profit small entities in a cost effective manner, while complying with all professional standards.

Who Should Attend  
Professionals who perform audit engagements of profit and not-for-profit small entities.

Content  
Risk assessment  
• understanding CAS 315 “Identifying and Assessing the Risks of Material Misstatement through understanding the entity and its environment” and how to use it when performing risk assessment procedures  
• practical risk assessment procedures, including the use of analytics as a risk assessment procedure  
• how to document the risk assessment procedures performed, summarize results and document conclusions

Risk response and reporting  
• understanding CAS 330 “The Auditor's Responses to Assessed Risks” and how to use it in responding to risk  
• customizing audit procedures to address risk,  
• understanding which further audit procedures to perform  
• the use of tests of detail and analytical audit procedures as a substantive risk response  
• when and how to use test of controls as a risk response, extent of testing considerations  
• how and when to use sampling techniques,  
• forming and documenting judgments and conclusions,  
• communicating audit findings

Other topics  
• client acceptance procedures,  
• understanding CAS 320 “Materiality in Planning and Performing an Audit” and the particular issues of determining and using materiality

Seminar Leader to be drawn from  
Robin Diehl, CPA, CA, CBV  
Diane McDonald, CPA, CA

Audit Engagements: File Review  
LEVEL Intermediate

Prerequisite  
Familiarity with the CPA Handbook - Assurance.

Overview  
This seminar focuses on review methodologies that help ensure an efficient and effective review of working papers for audit engagements. This seminar develops a process for performing and documenting a review of working paper files at different review levels. Participants will be able to understand the relationship between the review process and the requirements for file reviews under the Canadian Auditing Standards (CAS). All specific file review roles discussed in CSQC #1 will be covered.

Who Should Attend  
Experienced professionals interested in improving their review skills

Content  
• why we review working paper files  
• detailed outline of file review requirements under the CAS  
• optimal schedule for working paper review  
• useful techniques to use when reviewing working papers  
• discussion of review problems encountered in practice  
• requirements of CAS 230 audit documentation, and other CAS sections that have documentation requirements  
• file review notes – how to prepare and present them to file preparers  
• provincial inspection reports as a tool for file review  
• reviewing for file efficiency purposes  
• how to review some key audit forms  
• case studies in file review  
• the use of checklists when reviewing

Seminar Leader to be drawn from  
Terry Gunderson, CPA, CA  
Diane McDonald, CPA, CA

Oct 30 9am-5pm Ramada Hotel, Kelowna [A73230A_KE]  
Nov 15 9am-5pm Coast Hotel, Kamloops [A73230B_KA]  
Nov 23 9am-5pm Van Conv Ctr West, Vancouver [A73230C_VA]  
Fee $425 PD Passport Valid 1 Passport Day 7 CPD Hours
Auditor's Responsibility Relating to Fraud (CAS 240)
LEVEL Introductory

Prerequisite
None

Overview
An auditor has responsibilities relating to fraud in the context of an audit. The requirements of CAS are designed to assist the auditor in identifying and assessing the risk of material misstatement due to fraud and in designing procedures to respond to and detect such misstatements. This course will clarify these requirements and assist the practitioner in meeting their responsibilities related to fraud in a practical and efficient manner. Participants who attend this course will be better able to understand the characteristics of fraud and their responsibilities related to fraud in an audit. Participants will also be better equipped to identify and assess the risk of material misstatement and respond appropriately to those risks. Finally, participants will better understand how to maintain an attitude of professional skepticism throughout the audit which will help them to perform a quality audit and reduce their risks.

Who Should Attend
Practitioners in public practice who want to improve their ability to identify and assess the risk of fraud, and strengthen the work performed and documented in the audit files in order to meet their responsibilities related to fraud.

Content
• overview of CAS 240 and its related requirements
• review of key characteristics of fraud
• through discussion and examples, design audit procedures to address the risk of fraud including reviewing of journal entry testing requirements and building unpredictability into audit procedures
• evaluate audit evidence obtained and assess impact on planned audit procedures and the audit report
• overview of documentation and communication requirements, including responding appropriately to fraud or suspected fraud identified during the audit

Seminar Leader to be drawn from
Bridget Noonan, CPA, CA
Rosanne Walters, CPA, CA, CBV, CFE, CFF

Common Documentation Issues with Review Engagements
LEVEL Intermediate

Prerequisite
Previous experience and understanding of review engagements.

Overview
This executive brief will provide participants with examples of review engagement documentation in the most crucial areas of typical review engagement files. Tips to improve file documentation will be provided in the most commonly deficient areas. By the end of the session, attendees will have the tools to quickly identify incomplete review engagement documentation during a file review, and understand what needs to be done and documented to resolve the outstanding issues.

Who Should Attend
Practitioners and managers who perform review engagements.

Content
• documenting the nature of the client's business
• cut-off procedures for the major cycles
• inventories
• related party balances
• percentage of completion analysis
• variance analysis on revenue, expenses and payroll
• contractual obligations, contingencies and subsequent events
• dating of the review engagement report (AuG-47)

Comments from Past Attendees
"Real life examples. " "Speaker was very knowledgeable and practical."
"The speaker and materials provided examples that could be used in real life situations."

Seminar Leader
Tom Gillespie, CPA, CA

<table>
<thead>
<tr>
<th>Date</th>
<th>Time</th>
<th>Location</th>
<th>Passport Valid</th>
<th>CPD Hours</th>
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<tbody>
<tr>
<td>Dec 04</td>
<td>8am-10am</td>
<td>Sutton Place, Vancouver</td>
<td>1/3 Passport Day</td>
<td>2 CPD Hours</td>
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<tr>
<td>Feb 09</td>
<td>8am-10am</td>
<td>Sutton Place, Vancouver</td>
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</table>
Compilation Engagements: Experienced Practitioners
LEVEL Intermediate

Prerequisite

Overview
The objective of this seminar is to provide examples on different approaches to completing and documenting compilation engagements. The material covers the current standards for compilation engagements and explores some best practice approaches that are being applied by practitioners. The course also provides a forum for practitioners to discuss the difficulties they have experienced and solutions that have worked for them.

Who Should Attend
Experienced practitioners, and their senior staff with significant public practice experience, who would like an overview of the practical issues of compilation engagements. Members seeking to fulfill transitional legacy licensing requirements should refer to page 100 for dedicated offerings of Compilation Engagements instead. You should not be attending this session for experienced practitioners.

Content
• standards set out in the CPA Handbook - Assurance
• various topics relating specifically to compilation engagements
  - what communication issues are relevant
  - how does lack of independence impact these engagements
  - how does the CPABC Code of Professional Conduct impact these engagements
  - how do the standards impact bookkeeping practices
  - how do the standards impact tax compliance work performed
• discussion of what should be included in the working paper file
  - how much work is too little, or too much, to have in our files
  - the use of an index, engagement letters and other client correspondence, checklists, and file review procedures
• sample compilation files to provide practical examples of different compilation files under different scenarios
• appendix - compilation and independence checklists; and other relevant materials of interest to practitioners

Seminar Leader to be drawn from
Greg Buck, CPA, CA, BComm  Tom Gillespie, CPA, CA
Terry Gunderson, CPA, CA  Bridget Noonan, CPA, CA
Grant Smith, CPA, CA

Fraud Risk Management Principles & Practices – An Integrated Approach
LEVEL Introductory

Prerequisite
None

Overview
Effective fraud risk management requires an integrated approach. This seminar brings together key principles and practices using the 2016 updated COSO1 fraud risk management framework. The course material includes case discussions, sample codes of conduct, fraud policies, fraud risk checklists and other practical materials to help participants build a corporate culture and framework that prevents and detects fraudulent activity.

This seminar provides “real life” examples of fraud and examples based on instructor and participant experiences. It explains why we need to manage fraud. It then provides an integrated approach, describing the five key COSO principles of fraud risk management as outlined below.

Who Should Attend
Members in industry who require knowledge of historical and current frauds, possible fraud indicators in their transaction streams, and how to develop an integrated approach for effective fraud risk management. Members in public practice may also benefit as participants will learn to recognize indicators of potential fraud which can assist in the conduct of an effective audit.

Content
• why do we need to manage fraud risks
• COSO framework for Fraud Risk Management
• Principle 1: Governance - creating an ethical environment: discussion about codes of conduct, fraud policies, hotlines, ethics training, employee declarations, and other practices.
• Principle 2: Comprehensive fraud risk assessment: fraud indicators and red flags, and a series of fraud risk assessment cases for class discussion.
• Principle 3: Preventive and detective fraud control activities: a high-level overview of potential controls.
• Principle 4: Fraud investigation protocol: high-level overview of how to properly react to fraud, investigation considerations, taking corrective action and fidelity insurance matters.
• Principle 5: Fraud risk management monitoring: ongoing evaluation and timely communication, with an introduction to data analytics

Seminar Leader
Rosanne Walters, CPA, CA, CBV, CFE, CFF

| Oct 24 | 9am-12:30pm | Quality Hotel, Abbotsford | [A72010E_AB] |
| Oct 24 | 9am-12:30pm | Sutton Place, Vancouver | [A72010E_VA] |
| Oct 24 | 1:30pm-5pm | Coast Hotel, Kamloops | [A72010G_KA] |
| Nov 03 | 1:30pm-5pm | Van Island Conf Ctr, Nanaimo | [A72010H_NA] |
| Nov 08 | 9am-12:30pm | Ramada Hotel, Kelowna | [A72010I_KE] |
| Nov 15 | 9am-12:30pm | Comfort Inn, Victoria | [A72010J_VI] |
| Nov 17 | 9am-12:30pm | Executive Airport, Richmond | [A72010K_RI] |
| Nov 24 | 1:30pm-5pm | Sheraton Guildford, Surrey | [A72010L_SU] |
| Dec 15 | 9am-12:30pm | Van Conv Ctr West, Vancouver | [A72010M_VA] |
| Jan 26 | 9am-12:30pm | Sutton Place, Vancouver | [A72010N_VA] |
| Fee $220 | PD Passport Valid | 1/2 Passport Day | 3.5 CPD Hours |

Nov 20 | 9am-5pm | Van Conv Ctr West, Vancouver | [A73281A_VA] |
Dec 01 | 9am-5pm | Victoria Conf Ctr, Victoria | [A72281B_VI] |
Dec 06 | 9am-5pm | Sheraton Guildford, Surrey | [A72281C_SU] |
Fee $425 | PD Passport Valid | 1 Passport Day | 7 CPD Hours |
Law Society, Real Estate Council and Other Specified Procedures Reports

LEVEL Introductory

Prerequisite
None

Overview
This seminar will provide participants with a comprehensive review of the requirements CPA Handbook Section 9100 - Reports on the Results of Applying Specified Auditing Procedures to Financial Information other than Financial Statements.

Participants will be provided with information for performing and documenting Law Society of BC Trust Reports, Real Estate Council of BC Accountant’s Reports or other specified procedures engagements in accordance with the standards and rules of professional conduct. The material will also provide a brief summary of assurance standards other than audits and reviews of historical financial statements and the need to identify the appropriate standard for commonly encountered special reports. The seminar will include examples of the documentation required to complete these engagements, and discussions of common deficiencies.

Who Should Attend
Practitioners who are engaged to complete or are considering accepting Law Society of BC Trust Reports, Real Estate Council of BC Accountant’s Reports or other specified procedures engagements.

Content
• requirements of CPA Handbook Section 9100
  - client acceptance and independence
  - engagement letter considerations
  - planning
  - file documentation
  - reporting
  - AASB agreed-upon procedures project
  - Law Society of BC Trust Reports
  - Real Estate Council of BC Accountant’s Report
• other specified procedures and special report engagements

Seminar Leader
Tom Gillespie, CPA, CA

Nov 03 1:30pm-5pm Four Seasons, Vancouver [A72013B_VA]
Feb 16 1:30pm-5pm Sutton Place, Vancouver [A72013C_VA]
Fee $220 PD Passport Valid 1/2 Passport Day 1 CPD Hours

Quality Control Manual for Public Practitioners – Canadian Standards of Quality Control (“CSQC 1”)

(formerly Quality Control - Maintaining & Monitoring)
LEVEL Intermediate

Prerequisite
Familiarity with CSQC #1 Standard.

Overview
Every public practice firm providing assurance engagements is required to comply with the quality control standards as set out in Canadian Standards for Quality Control (“CSQC1”). Some firms have a difficult time, or spend an excessive amount of administrative time, in the selection, documentation, monitoring and reporting of their quality control policies and procedures. This course is designed to assist sole practitioners and small firms in meeting the requirements of their quality control systems through understanding how the requirements apply in a small firm environment.

Note that requirements specific to firms providing services to publicly accountable entities will not be covered.

Who Should Attend
Practitioners, partners and senior staff who are responsible for the quality control function in the firm. Firms who provide or are contemplating providing assurance services should attend this session.

Content
• integration of quality control policies and procedures into firm and file documentation
• requirement for engagement quality control reviews
• ongoing (annual) monitoring: who, what, when, how and reporting
• completed file (cyclical) monitoring: who, what, when, how and reporting
• annual updating of the firm’s Quality Assurance Manual (QAM)
• common quality control deficiencies

Note
Practitioners should bring a copy of the firm’s quality control manual with them to the course in order to apply ideas and concepts to their own quality control processes.

Seminar Leader
Bridget Noonan, CPA, CA

Nov 22 1:30pm-5pm Van Conv Ctr West, Vancouver [A72410B_VA]
Fee $220 PD Passport Valid 1/2 Passport Day 3.5 CPD Hours
Review Engagements: Practical Application
LEVEL Introductory

Prerequisite
None

Overview
This course will focus on the key requirements of CSRE 2400 – Engagements to Review Historical Financial Statements. It will include comparisons and contrasts with the 8000 series of review engagement standards for financial statements and other historical financial information. It will provide practical application and hands-on practice for more complex elements of the standard.

Who Should Attend
Public practitioners who will be issuing reports under the review engagement standard, CSRE 2400. Members seeking to fulfill transitional legacy licensing requirements should refer to page 100 for dedicated offerings.

Content
• outline the pre-conditions for acceptance of a review engagement and recognize the key differences pertaining to engagement letters and quality assurance between CSRE 2400 and the 8000 series of standards
• plan a review engagement in accordance with the requirements of CSRE 2400, including obtaining an understanding of the entity and its environment sufficient to identify areas likely to be materially misstated
• determine materiality and identify trivial misstatements
• document the engagement planning efficiently and effectively
• design and perform inquiry and analytical procedures in accordance with the standard and determine whether the evidence obtained is sufficient and appropriate
• apply new requirements related to related party transactions, going concern, fraud, material commitments, contractual obligations, and contingencies
• evaluate results and assess whether the financial statements may be materially misstated and determine when it is necessary to design and perform further procedures
• identify when it is appropriate to issue unmodified and modified practitioner’s reports and when emphasis of matter and other matter paragraphs are appropriate
• determine the appropriate date for the practitioner’s report.
• communicate engagement findings

Seminar Leader to be drawn from
Tom Gillespie, CPA, CA
Diane McDonald, CPA, CA
Grant Smith, CPA, CA

Review Engagements: File Review
LEVEL Intermediate

Prerequisite
Familiarity with the CPA Handbook standards

Overview
This seminar focuses on review methodologies that help ensure an efficient and effective review of working papers for review engagements. This seminar develops a process for performing and documenting a review of working paper files at different review levels. Participants will be able to understand the relationship between the review process and the requirements for engagement file reviews under CSRE 2400. All specific file review roles discussed in CSQC #1 will be covered.

Who Should Attend
Experienced professionals interested in improving their review skills.

Content
• why we review working paper files
• detailed outline of file review requirements under the CSQC #1
• how to ensure the file is prepared under then requirements of CSRE 2400
• optimal schedule for working paper review
• useful techniques to use when reviewing working papers
• discussion of review problems encountered in practice
• file review notes – how to prepare and present them to file preparers
• provincial inspection reports as a tool for file review
• reviewing for file efficiency purposes
• how to review some key assurance forms
• case studies in file review
• the use of checklists when reviewing

Seminar Leader to be drawn from
Diane McDonald, CPA, CA
Bridget Noonan, CPA, CA

Oct 23 9am-5pm Coast Hotel, Kamloops [A73222A_KA]
Oct 27 9am-5pm Sutton Place, Vancouver [A73222B_VA]
Oct 30 9am-5pm Sheraton Guildford, Surrey [A73222C_SU]
Nov 02 9am-5pm Quality Bayside, Parksville [A73222D_PA]
Nov 03 9am-5pm Quality Hotel, Abbotsford [A73222E_A]
Nov 06 9am-5pm Ramada Hotel, Prince George [A73222F_PG]
Nov 07 9am-5pm Ramada Hotel, Kelowna [A73222G_KE]
Nov 16 9am-5pm Executive Airport, Richmond [A73222H_RI]
Nov 28 9am-5pm Victoria Conf Ctr, Victoria [A73222I_VI]
Dec 04 9am-5pm Sutton Place, Vancouver [A73222J_VA]
Jan 26 9am-5pm Sutton Place, Vancouver [A73222K_VA]
Fee $425 PD Passport Valid 1 Passport Day 7 CPD Hours
ASPE: A Comparison to IFRS
LEVEL Introductory

Prerequisite
None

Overview
This seminar examines the major differences between Part II - Accounting Standards for Private Enterprises (ASPE) and publicly accountable enterprises using Part I - International Financial Reporting Standards (IFRS) with an eye toward giving participants an understanding of the major similarities and significant differences between the two sets of standards and how these differences impact financial statements. You will learn about current developments and changes to standards in IFRS and how they will impact ASPE, and the one-time considerations on transitioning between the two sets of standards.

Who Should Attend
Those who want to have a general understanding of the key differences between IFRS and ASPE to determine which set of standards would be most appropriate for an entity, and be able to explain the impact of the differences on the client's financial statements and the implications of using IFRS compared to ASPE.

Content
• conceptual framework, fair value measurement
• standards related to financial statement presentation, including non-current, non-financial assets, property, plant and equipment, investment property, agriculture, intangible assets and impairment
• borrowing costs, assets held for sale, financial instruments, joint ventures and investment
• other liabilities, including asset retirement obligations, provisions, contingencies, employee benefits and income taxes
• leases and revenue recognition (including new standards)
• other standards, including inventories, subsequent events, government grants, foreign currency, consolidated financial statements, non-controlling interests, investments, related party transactions and stock based compensation
• first-time adoption

Comments from Past Attendees
“The refresher was very useful and the binder of material will be very useful in future.” “Great seminar – one that I would recommend.” “Very good.”

Seminar Leader
Diane McDonald, CPA, CA

ASPE: A Survey of the Standards
LEVEL Intermediate

Prerequisite
Familiarity with the CPA Handbook - Accounting Part II.

Overview
This seminar provides an overview of Part II - Accounting standards for private enterprises (ASPE), from Section 1000 to Section 3870 and the accompanying Accounting Guidelines. The course identifies the interrelationship of ASPE and accounting standards for not-for-profit organizations (ASNPO), but does not explore ASNPO specific standards for revenue, related parties, control concepts and special disclosures under ASNPO. The objective is to provide information about all of the standards that make up Part II - ASPE with illustrative examples in certain measurement and disclosure areas, and outline the accounting policy choices available in ASPE. Some supplemental information to address ASPE application for not-for-profit organizations will be included at a high level.

Who Should Attend
Those seeking a robust and complete review of ASPE. Individuals involved in the not-for-profit sector may also find this course useful because of the ASPE measurement, recognition, presentation and disclosure requirements applicable to not-for-profit accounting and reporting.

Content
The seminar will provide information about all of the standards that make up Part II of the Handbook. Examples and exercises will cover the newer or more common concepts of accounting used by private enterprises or areas where practice review has identified struggles or challenges. Topics include
• accounting standards framework and general standards
• financial instruments
• tangible assets
• long-term assets
• non-financial liabilities
• shareholder equity
• revenue and other expenses
• other disclosures and other matters
• sample financial statements
• numerous note examples

Note
The seminar and the materials provided do not review in depth the transition to ASPE or provide a comparison of the ASPE to the previous accounting standards or IFRS.

Seminar Leader to be drawn from
Tom Gillespie, CPA, CA
Diane McDonald, CPA, CA

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ASPE: Disclosure and Presentation - From Standards to Words
LEVEL Intermediate

Prerequisite
The material does not address recognition and measurement; therefor, a good working knowledge of the recognition and measurement standards is expected.

Overview
This seminar reviews the reality and best practices for disclosure and presentation requirements of Part II – Accounting Standards for Private Enterprises (ASPE), from cash to cash flow; from financial instruments to equity instruments; and from the known to the contingent. The seminar will start with a basic private enterprise financial statement, showing the common presentation and disclosure requirements and will then build on those statements with additional disclosure and presentation matters. Each disclosure and presentation requirement of ASPE will be reviewed and examples will be provided (sample financial statements are developed during the seminar).

Who Should Attend
Practitioners who serve private enterprises and those who prepare financial statements for private enterprises.

Content
The seminar will be delivered primarily through discussion of examples with some exercises. Topics include:
- disclosure requirements provided in Part II of the CPA Canada Handbook – Accounting
- applying professional judgement in developing sufficient disclosure
- identifying options and choices in presentation
- presentation and disclosure requirements in Sections 1000 through Section 3870 and the Six Guidelines in Part II of the CPA Canada Handbook – Accounting

Comments from Past Attendees
"I’m walking away from this course feeling for the first time that I have a decent understanding of ASPE." "This is a great seminar and I would highly recommend it." "An excellent refresher on ASPE updates and a great resource for future reference."

Seminar Leader to be drawn from
Diane McDonald, CPA, CA
Tom Gillespie, CPA, CA

ASPE: In the Real Estate Industry
LEVEL Intermediate

Prerequisite
Familiarity with the CPA Handbook - Accounting Part II

Overview
This seminar explores the Part II - Accounting Standards for Private Enterprise (ASPE) that are applicable to the real estate industry links to REALpac in a practical manner. For the purposes of this seminar, the real estate industry will include real estate development and rental properties. Participants will discuss accounting issues encountered by builders, developers and landlords that have direct or indirect ownership of the real estate. Accounting issues related to the general contractors or subcontractors who are involved in the construction industry will not be covered. You will also learn about the disclosure requirements of ASPE and other issues specific to the real estate industry.

Who Should Attend
Professionals who work in, or are interested in financial reporting and related areas of accounting in the real estate industry.

Content
- development and construction costs
- rental properties (including construction, purchase or sale)
- revenue recognition, impairment, asset retirement obligations, joint ventures
- standards for real estate entities including:
  - Section 1000, Financial Statement Concepts
  - Section 1100, Generally Accepted Accounting Principles
  - Section 1510, Current Assets and Current Liabilities
  - Section 3031, Inventories
  - Section 3055, Interest in Joint Ventures
  - Section 3061, Property, Plant and Equipment
  - Section 3063, Impairment of Long-lived Assets
  - Section 3064, Goodwill and Intangible Assets
  - Section 3110, Asset Retirement Obligations
  - Section 3400, Revenue
  - Section 3475, Assets Held for Sale
  - Section 3850, Interest Capitalized
  - Section 3856, Financial Instruments

Seminar Leader
Diane McDonald, CPA, CA
ASPE: Related Party Transactions – How Do You Measure Up?
LEVEL: Intermediate
Prerequisite
Familiarity with the CPA Handbook - Accounting Part II
Overview
Deficiencies in the accounting for and disclosure of related party transactions have regularly been reported by practice review. This one-day course is designed to address the challenges private enterprise accountants and service providers encounter with respect to the measurement and disclosure of related party transactions and balances under Part II – Accounting Standards for Private Enterprises (ASPE).
Who Should Attend
Professionals involved in the preparation of private enterprise financial statements, and practitioners who serve private clients with related party transactions.
Content
This seminar will review ASPE, Section 3840 - Related Party Transactions, and address the common challenges encountered. Topics include:
• identifying a related party
• when a related party is deemed not to be a related party
• appropriate measurement basis for related party transactions
• when does Section 3856, Financial Instruments apply to related party transactions
• when should exchange value be used in place of carrying value
• presentation of amount due to and from related parties
• disclosure requirements under Section 3840 including the terminology dos and don’ts
• accounting for business combinations among related parties
• accounting for amalgamations, wind-ups and other combinations involving related parties
Comments from Past Attendees
“Many good examples in course material.” “Overall the seminar is informative.” “Will recommend to others.”
Seminar Leader
Diane McDonald, CPA, CA

How to Research and Document the Conclusion of an Accounting Issue
LEVEL: Introductory
Prerequisite
Familiarity with the CPA Handbook - Accounting (focus on Part II)
Overview
This workshop walks through the process of identifying, researching and documenting an accounting issue. Participants will examine an accounting issue where guidance exists, as well where there is no existing guidance. Examples under various applicable financial reporting frameworks will be reviewed, with a focus on guidance in the ASPE standards.
Who Should Attend
Professionals who work in financial reporting and related areas.
Content
• developing a process when an accounting issue is presented
• professional judgement, skepticism and ethics
• accounting frameworks and alternative frameworks available
• estimates
• documentation requirements
Comments from Past Attendees
“A lot of useful research tools and resources provided.” “I am more confident and comfortable to research and document after this.” “The seminar was a good mix of lecture and discussion.” “Provided me with useful information on handling a client reporting issue.”
Seminar Leader
Diane McDonald, CPA, CA

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**IFRS: A Survey of the Standards**  
**LEVEL Introductory**

**Prerequisite**  
Familiarity with the *CPA Handbook - Accounting Part I*

**Overview**  
The objective of this seminar is to provide participants with a solid introduction to the International Financial Reporting Standards (IFRS) incorporated as part of the *CPA Handbook – Accounting – Part I*. You will also be informed on IFRS standards currently under development at the International Accounting Standards Board (IASB) that are expected to be introduced during the next year. The focus is on the IFRS standards that apply to most profit-oriented entities. At the end of this two-day seminar you will be aware of the foundation of IFRS, and have a basic understanding of IFRS content.

**Who Should Attend**  
Professional accountants who work in financial reporting and related areas of publicly accountable enterprises or other enterprises applying IFRS, who are reading financial statements of publicly accountable enterprises, or who wish to obtain an understanding of IFRS. Audit committee members who would like to gain an understanding of IFRS may also find this to be a useful course.

**Content**  
- overview of IFRS  
- financial statement presentation and accounting policies  
- property plant and equipment  
- investment property  
- intangible assets and fair value measurement  
- impairment of assets  
- revenue, financial instruments, income taxes, liabilities  
- strategic investments, separate financial statements  
- other IFRS standards  
- examples and exercises to illustrate application issues  
- optional content: first-time adoption considerations

**Comments from Past Attendees**  
"Excellent annual refresher." "Very informative two days." "The practical examples within the course material were the most helpful." "It was a great seminar with lots of information."

**Seminar Leader**  
Diane McDonald, CPA, CA

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**IFRS: Disclosure and Presentation - From Standards to Words**  
**LEVEL Intermediate**

**Prerequisite**  
Familiarity with the *CPA Handbook - Accounting Part I*

**Overview**  
This seminar provides participants with an overview of Part I – International Financial Reporting Standards (IFRS) related to the preparation of all the statements and related note disclosure for all areas, with an emphasis on quality presentation and disclosure. At the end of the seminar, you will better understand the standards related to financial statement presentation and note disclosure under the IFRS; have reviewed sample notes and statements to assist with application in your own work environment; and worked on mini cases that assist with the understanding of how to implement the presentation and disclosure standards.

**Who Should Attend**  
Those involved in the preparation of IFRS financial statements for enterprises.

**Content**  
Presentation on all the financial statements and note disclosures related to  
- business combinations, consolidations, subsequent events and investments  
- all assets  
- all liabilities  
- revenue and expenses  
- other disclosures — related party transactions, government grants, agriculture, exploration, interim statements, first-time adoption, contingencies, commitments, subsequent events, going concern, and economic dependence

**Comments from Past Attendees**  
"The course material was excellent and will be a good resource going forward. I thought the coverage of the course was very thorough without becoming information overload." "Very well organized and explained."

**Seminar Leader**  
Erin Rao, CPA, CA

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IFRS: Financial Instruments  
LEVEL Intermediate  

Prerequisite  
Although not mandatory, participants would benefit from reading the most recent edition of IFRS 9 in advance of this course – contained in CPA Handbook Standards – Accounting Part I.

Overview  
This course is designed to teach participants the main provisions of the new Part I - International Financial Reporting Standards (IFRS) 9, Financial Instruments, which will replace most guidance that currently exists in IAS 39 when adopted. What is changed from and also what is consistent with IAS 39 will be discussed.

This new standard applies to all companies and may require planning, system and process changes to implement, as it may significantly change financial instrument classification, measurement and impairment amounts and their timing of recognition. The standard is generally applied retrospectively with the exception of the hedge accounting requirements which are generally applied prospectively.

The standard is effective for fiscal years starting after January 1, 2018, but it can be early-adopted entirely, or certain provisions may be early-adopted in isolation. The standard has been released in phases, and if entities adopted a prior version of IFRS 9, they will apply that version until they adopt the final standard.

This course will provide participants with the necessary knowledge of the standard to apply it to their own financial instrument fact situation.

Who Should Attend  
New CPAs, supervisors, partners, financial analysts, and controllers responsible for the accounting, presentation and disclosure of financial instruments.

Content  
• overview and scope  
• classification, reclassification and presentation  
• initial recognition, subsequent measurement and de-recognition  
• impairment  
• derivatives and embedded derivatives  
• hedging and related future developments  
• disclosures  
• effective date and transitional requirements  
• future developments, including a new macro hedge accounting model

Seminar Leaders  
Peter Jackson, CPA, CA  
Jonathan Wong, CPA, CA

Dec 15  9am-5pm  Van Conv Ctr West, Vancouver  [A73012B VA]  
Mar 16  9am-5pm  Sutton Place, Vancouver  [A73012C VA]  
Fee $425  PD Passport Valid  1 Passport Day  7 CPD Hours

IFRS: Leases  
LEVEL Intermediate  

Prerequisite  
Although not mandatory, participants would benefit from reading the most recent edition of IFRS 9 in advance of this course – contained in CPA Handbook Standards – Accounting Part I.

Overview  
This seminar provides participants with an understanding of the new lease standard under Part 1 – International Financial Reporting Standards (IFRS). The rationale for the new standard and how it changes the current method of accounting for leases will be discussed. The starting point will be identifying a lease and separating components of a contract between the lessee and lessor. Participants will have the opportunity to review a number of illustrative examples.

Who Should Attend  
Practitioners, financial analysts, and controllers responsible for lease accounting. In addition, it is relevant to professional accountants and audit committee members interested in understanding the implications of the new lease standard.

Content  
• overview of reasons for the change, and what will change  
• introduction to IFRS 16 - objective and scope, defined terms, exemptions, and effective date  
• identifying a lease  
  • separate components of a contract lessee and lessor  
  • lessee  
  • principles of recognition  
  • measurement – initial and subsequent  
  • presentation  
  • disclosure  
  • likely costs and benefits of the new standard  
• lessor  
  • classification of leases as finance or operating leases  
  • disclosure  
• sale and leaseback transactions  
• transitional requirements  
• amendments to other standards  
• impact of IFRS 16 on financial statements and ratios  
• discussion of practical issues, supplemented with numerous illustrative examples and short case studies

Seminar Leader  
Diane McDonald, CPA, CA

Nov 03  9am-5pm  Sheraton Guildford, Surrey  [A73300B SU]  
Nov 24  9am-5pm  Van Conv Ctr West, Vancouver  [A73300C VA]  
Mar 06  9am-5pm  Sutton Place, Vancouver  [A73300D VA]  
Fee $425  PD Passport Valid  1 Passport Day  7 CPD Hours
IFRS: Mineral Resource Exploration & Mining Industry Basics  
LEVEL Introductory to Intermediate

Prerequisite  
Familiarity with the CPA Handbook - Accounting Part I

Overview  
This seminar will provide participants with a good understanding of the Part I - International Financial Reporting Standards (IFRS) relevant to mineral resource exploration and mining, and their specific application to industry issues.

Who Should Attend  
Professional accountants who work in, or are interested in, the mineral resource exploration and mining sectors and related areas of publicly accountable enterprises, and audit committee members of these enterprises.

Content  
- exploration for an evaluation of mineral resources  
  - recognition and measurement  
  - impairment  
  - functional currency  
- development stage companies  
  - cost capitalization  
  - borrowing cost  
  - property options/earn-ins  
- production stage companies  
  - property, plant and equipment  
  - commencement of production  
  - componentization, depreciation and amortization  
  - impairment of assets  
  - deferred stripping  
  - inventory  
  - revenue  
  - functional currency  
  - closure  
    - accounting for decommissioning and environmental liabilities  
  - financing activities  
    - share-based payments  
    - flow-through shares  
    - unit offerings  
    - share issuance costs  
    - royalties  
    - convertible debt  
  - financial statement presentation, reporting and disclosure

Seminar Leaders  
Kevin Cheung, CPA, CA  
Mark Patterson, CPA, CA

Nov 10  
Fee $425  
9am-5pm  
Paxton Place, Vancouver

IFRS: Revenue Recognition Standard  
LEVEL Intermediate

Prerequisite  
Participants should read IFRS 15, Revenue from Contracts with Customers.

Overview  
The objective of this course is to provide participants with an understanding of the new five-step revenue recognition framework under Part I - International Financial Reporting Standards (IFRS) 15 and how to apply it. The course will address disclosure requirements, transitional requirements, and key judgments in applying the standard.

Who Should Attend  
Professional accountants who are responsible for revenue recognition and the accounting thereof.

Content  
- overview and scope, including transitional requirements  
- the 5-step model framework, including how to apply it  
  - step 1: identify the contract with the customer  
  - step 2: identify the performance obligations  
  - step 3: determine the transaction price  
  - step 4: allocate the transaction price  
  - step 5: recognize revenue, including how and when  
- disclosure and presentation requirements  
- other application guidance on various topics such as warranties, licences, capitalization of costs of obtaining and fulfilling a contract, contract modifications etc.  
- conversion considerations, industries significantly impacted and current developments

Comments from Past Attendees  
“One of the most useful and informative seminars I have attended in several years.” “Very informative with good examples.”

Seminar Leaders to be drawn from  
Alex Farrell, CPA, CA  
Peter Jackson, CPA, CA  
Diane McDonald, CPA, CA

Dec 08  
Fee $425  
9am-5pm  
Paxton Place, Vancouver

Notes:  
PD Passport Valid 1 Passport Day 7 CPD Hours

Feb 23  
Fee $425  
9am-5pm  
Paxton Place, Vancouver
IFRS: Update 2017
LEVEL Intermediate

Prerequisite
Participants are expected to have an understanding of current IFRS prior to attending this course.

Overview
International Financial Reporting Standards (IFRS) continue to change and it is important to keep up-to-date.

This seminar provides participants with a review of new and revised IFRS and an up-to-date snapshot of other projects being considered by IFRS standard setters. The content covers new and revised standards approved from July 2016 to June 2017, so you will have an understanding of the IFRSs approved or revised during the past year and an overview of projects on the International Accounting Standards Board’s (IASB) agenda. This seminar will also revisit the significant change to IFRS that was approved in the prior year to provide you with additional knowledge.

Who Should Attend
All professionals who want to be informed of the recent developments in IFRS standards, including: public accountants, preparers and readers of financial statements using IFRS. CFOs and VPs, directors, senior managers, controllers and other financial reporting staff, auditors, and audit committee members.

Content
• overview of IFRS — issued, revised and in progress
• review of new and revised standards
• review of application guidance on previously issued standards
• leases
• review of feedback from regulators
• review of exposure drafts and other projects in progress

Comments from Past Attendees
“Content of information was perfect.” “Covered a lot of points and included examples.” “Excellent session.”

Seminar Leader to be drawn from
Diane McDonald, CPA, CA
Erin Rao, CPA, CA

Local Government Accounting & Auditing Workshop
LEVEL Intermediate

Prerequisite
Knowledge of local government legislation and terminology is assumed.

Overview
Chartered Professional Accountants of BC are pleased to offer this conference in conjunction with the Government Finance Officers Association of BC.

The objective of this conference is to provide a forum for practitioners and auditors on the accounting, auditing, reporting and financing to discuss the issues facing local governments. Practices within the Local Government sector are ever-evolving. This workshop will provide an opportunity for practitioners and auditors to get up to date on accounting and auditing practices, discuss the issues and exchange ideas. Attendees will have the opportunity to meet, interact, and exchange ideas with some of those involved in standard setting.

Who Should Attend
Local government finance officers, staff who prepare financial statements and auditors of local government entities.

Content
• Public Sector Accounting Board update
• Local Government Auditor General update
• current standard and practices regarding audits
• topical issues in local government accounting
• emerging issues related to technology and data analytics

For detailed information on sessions and speakers, please watch for future flyers and emails, or check our website.

Note
A special conference rate as well as a block of rooms have been arranged at the Coast Coal Harbour Hotel—registrants should book at this hotel if they require accommodation. The cut-off date for the conference rate is October 30, 2017. Please go to our website for more information on this rate.

Workshop Speakers
To be announced
NFPOs: A Survey of the Standards (Private Sector)

LEVEL Intermediate

Pre requisite
Familiarity with the CPA Handbook - Accounting Part III

Overview
This seminar provides an overview of the accounting standards for non-government controlled not-for-profit organizations (NFPOs) under Part III of the CPA Handbook. It reviews the application of Generally Accepted Accounting Principles (GAAP) with an emphasis on the areas where choices have to be made in the preparation of financial statements. Part III of the CPA Handbook provides the standards that are unique to private not-for-profit organizations. In addition, the underlying premise is that there should be no differences in accounting between profit-oriented enterprises and not-for-profit organizations when the circumstances and transactions are the same, (other than for matters included in Part III). Therefore, NFPOs are also directed to Part II of the CPA Handbook, Accounting Standards for Private Enterprises (ASPE).

Who Should Attend
Professionals involved in the preparation of NFPO financial statements. Those involved in larger NFPOs may prefer to attend the seminar Non-Profit Organizations & Registered Charities – Accounting & Taxation Issues (page 40).

Content
- recently revised standards and status on projects
- review of Part II of CPA Handbook (ASPE) as it relates to NFPOs
- accounting for financial instruments under Part II, Section 3856
- financial statement presentation - a review of the accounting choices that must be made in the preparation of financial statements for NFPOs
- accounting for contributions and contribution receivables
- accounting for tangible and intangible capital assets and collections
- accounting and disclosures related to controlled and related entities
- other matters and disclosures - use of a disclosure checklist

It should be noted that a NFPO can also elect to apply Part I, IFRS. This seminar will not discuss this option in detail but will review some of the more relevant accounting standards under ASPE.

Comments from Past Attendees
“Great. Interesting, good material, and good instructor.” “Take away binder will be a good resource.” “Practical examples.”

Seminar Leader
Robin Diehl, CPA, CA, CBV

NFPOs: Disclosure and Presentation - From Standards to Words

LEVEL Intermediate

Pre requisite
Participants should have knowledge of Part III of the CPA Handbook, with respect to measurement issues or completion of the seminar Not-for-Profit Organizations - A Survey of Standards (Private Sector).

Overview
In this seminar, participants will review financial statement presentation and note disclosure requirements under Part III of the CPA Handbook for Not-for-Profit Organizations (NFPOs) and relevant disclosures from Part II Accounting Standards for Private Enterprises (ASPE). You will learn how to develop presentation guidelines for a statement of financial position, statement of operations, statement of changes in net assets, and statement of cash flows. You will also learn how to develop note disclosure by major financial statement area (property, plant and equipment, liabilities, allocation of expenses), and others, such as; contingencies, commitments, subsequent events, related party transactions, etc..

Who Should Attend
Professionals involved in the preparation of NFPO financial statements. Those involved in larger NFPOs may prefer to attend the seminar Non-Profit Organizations & Registered Charities – Accounting & Taxation Issues (page 40). Government-controlled NFPOs must follow the Public Sector Accounting Handbook, which will not be addressed in this seminar.

Content
- concepts that drive the presentation and disclosure requirements
- accounting choices that must be made in the preparation of financial statements for NFPOs under the deferral method and the restricted fund method
- statement of operations presentation and related disclosures
- statement of financial position presentation and related disclosures, e.g. financial instruments
- statement of changes in net assets
- statement of cash flow presentation and related disclosures
- other disclosures: related party transactions, contingencies, commitments, subsequent events, going concern, economic interest, etc.
- ongoing projects and potential impact of changes

Comments from Past Attendees
“There was a lot applicable to my job and I’m sure I’ll be referring to the binder.” “Very good.” “Great examples and interesting dialogue/insight to what is upcoming in the NFP accounting standards.”

Seminar Leader
Robin Diehl, CPA, CA, CBV
Non-Profit Organizations and Registered Charities: Accounting and Taxation Issues
LEVEL Introductory to Intermediate

Prerequisite
Familiarity with the CPA Handbook - Accounting Part III

Overview
This seminar will address accounting and income tax issues specific to organizations carried on for not-for-profit purposes. Not-for-profit accounting, tax and reporting rules are substantially different from those applicable to private sector organizations. Without a solid understanding of these rules, individuals in financial reporting positions with these organizations may encounter difficulties meeting their reporting requirements.

Who Should Attend
Members in the NFPO sector and practitioners who audit or provide advice to registered charities or NFPO entities. It is not appropriate for those specifically involved with government not-for-profits applying standards prescribed by the Public Sector Accounting Board without the PS4200 Series.

Those who are responsible for preparing, analyzing, or auditing financial statements from smaller NFPOs, and/or those interested in a review of current standards may prefer to attend NFPO: A Survey of the Standards (Private Sector).

Content
• Canadian GAAP for not-for-profit financial statements
• tax compliance requirements for charities and not-for-profits
• Canadian tax rules with respect to loss of tax exempt status and planning techniques to minimize this risk
• latest proposed and enacted tax legislation affecting these entities

Comments from Past Attendees
"Very good and take away material was excellent." "Well worth it." "The practical examples were very helpful in solidifying the information presented." “Good range of topics.”

Seminar Leaders
Liette Bates-Eamer, CPA, CA
Hayley Maschek

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PSAB: The Basics
LEVEL Introductory

Prerequisite
Familiarity with the PSAB Handbook.

Overview
This seminar provides an overview of the Public Sector Accounting Board (PSAB) accounting recommendations as they apply to financial reporting by entities in the government sector. Key recommendations of the PSAB Handbook are reviewed, and a variety of examples are used to assist in understanding the application of the recommendations. Key concepts are compared against their IFRS and ASPE counterparts.

Who Should Attend
Professional accountants who prepare, audit, use or provide advice on public sector financial reports and would like to develop a stronger understanding of the PSAB Handbook.

Content
• financial statement concepts, objectives and reporting model
• defining the government reporting entity and reporting of controlled entities including government partnerships, and investments in government business enterprises
• government transfers, restricted assets and revenue, and revenue recognition concepts
• Tangible capital assets (infrastructure), intangibles and impairment of assets
• Financial instruments and foreign exchange
• pensions and employee future benefits
• contaminated sites, landfill obligations and asset retirement obligations
• related party transactions and inter-entity transactions
• loans receivable and loan guarantees
• changes in PSAB – exposure drafts, discussion papers, transitional provisions

Comments from Past Attendees
"Very well done. Very useful material, good presentations." "Course touched a broad range of topics, which is nice." “Real examples helped to provide context.”

Seminar Leaders to be drawn from
Bill Cox, FCPA, FCA
Asifa Hirji, CPA, CA
Brian Szabo, CPA, CA

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PSAB: Beyond the Basics
LEVEL Advanced

Prerequisite
Participants should have experience working with PSAB standards or have completed the course PSAB: The Basics (formerly PSAB 101).

Overview
This seminar provides an overview of the more complex areas of the Public Sector Accounting Board (PSAB) accounting recommendations as they apply to financial reporting by entities in the government sector. Common topics that raise discussions between finance professionals and auditors will be explored in detail and demonstrated in case studies.

Who Should Attend
Professional accountants who prepare, audit, use or provide advice on public sector financial reports and would like to develop a stronger understanding of the PSAB Handbook, specifically the topics noted below.

Content
- Employee future benefits, how well existing standards may work with shared risk plans and other new concepts, including an overview of PSAB’s work plans in this area and future directions
- Government transfers and the problems and diversity of opinion in application of PSAB standards
- Public/private partnerships and status of standards in the area
- Government business enterprises
- Financial instruments and hedging
- The government reporting entity, controlled entities and the concept of control in PSAB
- International public sector accounting standards board, GAAP hierarchy and PSAB’s international strategy

Comments from Past Attendees
"Information was very useful. Time went by really fast because it was so interesting." “Good seminar all around.” “Content was good and relevant.”

Seminar Leaders to be drawn from
Bill Cox, FCPA, FCA
Asifa Hirji, CPA, CA
Brian Szabo, CPA, CA

Public Company Reporting:
Annual Update
LEVEL Intermediate

Prerequisite
None

Overview
Change is constant in the public company reporting environment. You need to know about these changes so you can do your job properly, whether you are in public practice or in industry. You will learn about recent accounting, auditing, and regulatory developments affecting you, your clients, or your employer.

Who Should Attend
Practitioners who are involved in public company reporting, whether as an auditor in public practice, or a preparer in industry.

Content
Presenters include auditors practicing exclusively with public companies, and the primary accounting or policy contacts from the BC Securities Commission and the TSX Venture Exchange. If you do any work with public companies, you don’t want to miss this session!

Comments from Past Attendees
“Good balance on breadth vs. detail. Good variety of presentation methods.” “Good selection of presentation from numerous organizations involved with public companies. Good update on existing and upcoming issues.”

Seminar Leader
Panel TBA

Fee $220
PD Passport Valid 1/2 Passport Day 3.5 CPD Hours

Public Company Reporting:
Annual Update
LEVEL Intermediate

Prerequisite
None

Overview
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Comments from Past Attendees
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Seminar Leader
Panel TBA

Fee $220
PD Passport Valid 1/2 Passport Day 3.5 CPD Hours
Accelerate and Optimize Financial Close and Spreadsheet Controls
LEVEL Intermediate to Advanced

Prerequisite
A sound understanding of various financial close activities and use of spreadsheets for financial accounting and reporting purposes.

Overview
The objective of this course is to provide participants with a practical understanding of the best practices in financial close processes and spreadsheet controls. It will focus on spreadsheet controls enabling effective and efficient use of spreadsheets, the redesign of spreadsheets to reduce likelihood of error, and the use of spreadsheets as analytical tools for all types of organizations.

This course will also demonstrate that a carefully structured approach to managing spreadsheets can help identify and protect critical spreadsheets and leverage them as powerful analytical tools. Furthermore, establishment of effective and auditable controls surrounding critical spreadsheets and their use can reduce likelihood of error and fraud and contribute to an effective control environment for all types of organizations (publicly traded, private, governmental or not-for-profit) particularly those that have to comply with the CEO/CFO Certification requirements.

Who Should Attend
CFOs, Controllers, Accounting Managers, and Finance Personnel who wish to optimize the financial close process and enhance the supporting controls, or practitioners who have been engaged to provide services with respect to internal controls.

Content
- an overview of the close process and the acceleration objectives
- trade-off between speed and accuracy – strike a right balance without compromising controls
- an examination of best practices in the close process
- an examination of financial close controls
- how to build a roadmap to an optimum close process supported by robust controls
- spreadsheet risks
- spreadsheet inventory
- spreadsheet controls
- redesigning of spreadsheets
- spreadsheet control policy
- sustaining high integrity spreadsheets
- roles & responsibilities
- spreadsheet enhancement project roadmap

Seminar Leader
Massood Oroomchi

Activity-Based Costing and Management & Activity-Based Budgeting as a Strategic Weapon
LEVEL Intermediate

Prerequisite
None

Overview
In multi-product, multi-service, and multi-client companies, accurate costing and performance tracking (quality and cycle time) of products and services is not only a matter of survival but also a weapon for growth and profitability. This workshop introduces the key concepts and guidelines for implementing ABC/M/B as a strategic weapon, including the pros and cons of ABC/M in meeting strategic corporate objectives. It will provide you with clear direction on the critical steps required for implementing ABC within your organization, and post-implementation challenges of ABC-based budgeting. Also covered are linkages between ABC/ABM with Shared Services, business intelligence and value based reporting based on Dr. Jog's extensive experience in implementing ABC/M/B systems across the world.

Who Should Attend
CFOs, controllers, business planners, and other senior executives who play an important role in managing a company's resources, performance and profitability.

Content
- fundamentals of ABC/M
- keys to successful implementation of an ABC/M initiative
- understanding systems challenges in ABC implementations
- integrating ABC into the business planning and performance measurement framework
- linking ABC information to product profitability, client profitability, and shareholder value
- activity based budgeting and business planning
- the role of ABC in shared services environment (if time permits)
- case analysis

Comments from Past Attendees
"Dr. Jog was excellent! Lots of examples, and he knew his topic." "Great presentation, kept people engaged." "Excellent course."

Seminar Leader
Dr. Vijay Jog

Mar 08
9am-5pm
Sutton Place, Vancouver
Fee $450
PD Passport Valid
1 Passport Day
7 CPD Hours

Comments from Past Attendees
"Dr. Jog was excellent! Lots of examples, and he knew his topic." "Great presentation, kept people engaged." "Excellent course."

Seminar Leader
Dr. Vijay Jog

Dec 11
9am-5pm
Van Conv Ctr West, Vancouver
Fee $450
PD Passport Valid
1 Passport Day
7 CPD Hours
Advanced Financial Statement Analysis
LEVEL Intermediate

Prerequisite
It will be helpful but not mandatory to have an understanding of financial ratio analysis prior to attending this seminar.

Special Note
This seminar will be very interactive and hands-on. Participants will analyze real company financial statements and should bring a calculator with them.

Overview
Analyzing financial statements is no easy task. In a world where companies report results using different accounting frameworks, this task is becoming more and more challenging. This seminar will focus on how to analyze financial statements, in particular the lesser known techniques which are becoming more and more important when comparing IFRS and ASPE reporting. It will review the right techniques which are becoming more and more important to use straightforward financial ratio analysis and when comparing IFRS and ASPE reporting. It will consider how to analyze financial statements, in particular the lesser known techniques which are becoming more and more important when comparing IFRS and ASPE reporting. It will review the right techniques which are becoming more and more important.

Who Should Attend
Financial professionals who would like to enhance their abilities to read and evaluate the health of financial statements. It will also be of interest to users of financial statements, such as bankers, nonfinancial managers seeking financing, or equity analysts.

Content
• identify challenges involved in comparing companies
• apply common techniques to predict the likelihood of bankruptcy
• describe common adjustments required to financial statements prior to commencing analysis
• identify areas of subjectivity in financial statements and make a critical assessment of the subjectivity
• understand the differences in earnings quality across companies
• understand what makes a strong balance sheet
• improve confidence and competency in analyzing financial statements

Seminar Leader
Karine Benzacar, MBA, FCPA, FCMA, CFA

Controllership – A ‘Partner’ for Business
LEVEL Intermediate

Prerequisite
None

Overview
This comprehensive two-day seminar provides an overall understanding of the skills and tools necessary to effectively fulfill the Controller’s varied business responsibilities. Each day focuses on the major roles that a controller must have expertise in - operations management, and strategic leadership. A Controller must be adaptable to meet the challenges facing their businesses, both in the short-term (operations management) and long-term (strategic leadership).

Participants will learn how to add value in their organizations and will have opportunities to practically apply what they learn through interaction and knowledge exchange with their peers. This course should provide participants with an understanding of the varied aspects to the role of a Controller so that the Controller can be seen as an engaged business partner and provider of value-added to the organization beyond financial management.

Who Should Attend
Finance professionals working towards a controller position, who are new to the position of controller, or long-time controllers looking for new tools/ideas on leadership.

Content
Controller as an operational manager
• essential Controller skills
• Controller as a HR manager
• Controller as a financial/information manager
• Controller as a risk manager

Controller as a strategic leader
• Controller as a leader
• Controller as a strategic manager
• Controller as a change, conflict and crisis manager

This seminar will focus on the leadership aspects of the Controller’s role; day-to-day operational activities will not be covered in-depth. This course will be facilitated through lecture; class discussion, small group work, breakout discussion, and case study review. This will be a highly participative course that leverages all the knowledge and experience from the participants in the class.

Seminar Leader
Barbara VanDerLinden, FCPA, FCMA
COSO Undone: How to Comply with the 2013 COSO and Optimize Your Internal Control

LEVEL Intermediate to Advanced

Prerequisite
A general understanding of internal control frameworks.

Overview
The objective of this course is to provide a comprehensive understanding of the requirements of the 2013 COSO and demonstrate how to map the existing internal control environment to the 2013 COSO; how to identify and rank the severity of deviations from the requirements of the 2013 COSO; and how to comply with the 2013 COSO through integrating it with daily business activities. The course will show how to convert the internal control concepts to business initiatives and integrate them with daily business activities as opposed to a mere compliance exercise. It will also provide a concise understanding of CEO/CFO Certification requirements for publicly traded companies.

Who Should Attend
Members who directly or indirectly have or will have responsibility for internal control programs and practitioners who provide advice or assurance services to all types of organizations.

Content
- a comprehensive review of the 2013 COSO and its publications
- overview of internal control environments and control categories including entity level, transactional level and information technology controls
- practical top-down, risk-based approach to the design and establishment of internal controls
- how to document and evaluate entity level controls
- practical solutions to design and evaluation of disclosure controls and internal controls over the financial close process, consolidation, consolidated financial statements and notes thereto, MD&A and other core documents
- practical solutions for documentation and evaluation of spreadsheet controls
- practical solutions for enhancement of contract management controls and establishment of a risk-based approach to controls over outsourced service providers
- management controls including risk management programs, human resources policies and practices and strategic planning, budgeting & forecasting cycles
- how to deploy efficient risk-based techniques in documenting and testing transactional level controls
- anti-fraud controls
- how to optimize internal control programs and achieve significant savings by focusing on real issues

Seminar Leader
Massood Oroomchi

Costing & Profitability

LEVEL Introductory to Intermediate

Prerequisite
None

Overview
How profitable is your organization? Where is your company making its money? In most organizations, 80% of profits come from about 20% of the sales. The key to improving profitability or to turn an unprofitable situation into a profitable one, is to understand the drivers of profitability and how to leverage those core products or customers. Too often financial professionals are so occupied with the daily realities of reporting results that they don’t take the time to analyze them and improve them. In this interactive seminar, learn how to contribute directly to your organization’s bottom line by analyzing profitability by product, customer, segment, or geographical region. Learn how to identify the main drivers of profitability and the parts of the business that need to be changed. Any professional who can contribute directly to an organization’s bottom line will in turn expand their career opportunities and growth.

Who Should Attend
Financial professionals looking to improve their practical knowledge of costing and profitability within a financial function of an organization.

Content
- the basic functions of finance
- how to analyze profitability within an organization
- cost behaviours and model cost behaviours in an organization
- the four key components of cost and cost drivers
- overhead rates
- activity-based costing
- performance indicators
- different sources of profitability
- operating leverage
- profitability reporting, including effective reports and analysis, and how to communicate more effectively with senior management and key decision makers

Seminar Leader
Karine Benzacar, MBA, FCPA, FCMA, CFA

Dec 12 9am-5pm Van Conv Ctr West, Vancouver [A7363B_VA]
Fee $450 PD Passport Valid 1 Passport Day 7 CPD Hours
Documenting Your Organization's Financial Processes

LEVEL Introductory to Intermediate

Prerequisite
None

Overview
This seminar is designed to teach participants how to document their financial work processes and prepare detailed task-based procedures manuals. A current and comprehensive manual of essential operational procedures helps ensure that an organization’s processes meet required standards, that the organization can survive unexpected employee turnover, and that their financial controls meet corporate governance and disclosure obligations for publicly traded companies.

The seminar focuses on documenting an organization’s financial processes including AP, AR, asset management, treasury, accounting, cash management, accruals, journal entries, and payroll processes.

Who Should Attend
Accountants in all levels of industry and government that have an involvement in determining or managing their organization’s financial processes.

Content
- benefits of documenting financial work processes (and the potential pitfalls of not documenting them),
- outlining and prototyping, including how to determine which processes should be documented
- conducting procedure walk-through with staff
- capturing screen shots and other essential information
- writing and formatting procedures
- reviewing and approving draft procedures
- maintaining and revising your procedures manual

Comments from Past Attendees
"Duncan is very knowledgeable with document preparation and was very happy to share his experiences. " "Materials are easy to follow and logical in sequence – will be a useful resource." "Excellent course."

Seminar Leader
Duncan Kent, BA, MA

Effective Financial Analysis for Business Decisions: Small Businesses

LEVEL Introductory to Intermediate

Prerequisite
None

Overview
In today’s fast-paced world, the effectiveness of business decisions and analysis made by owners and their advisors depends directly on their understanding of the financial impact of their decisions. More than ever, management is looking for well laid out recommendations that go beyond a summary of financial information.

At the end of this seminar, participants will be able to assess a company’s business, operational and financial performance including implications of working capital management, impact of growth on financial needs, key aspects of cash flow and budgeting, financial performance indicators and techniques for analyzing financial data and statements for purposes of managerial decision-making, opportunity cost of capital, creating a business case for investment decisions and valuation.

Who Should Attend
Those who are running as owner/manager or working for/advising owners of privately held firms with less than 50 people and less than $5 million in sales.

Content
- linkages between business and operational performance and financial performance
- understand various analytical techniques to get a quick picture of the business and its implications for the future
- the role of effective working capital management
- key components of an effective financial plan
- time value of money, opportunity cost of capital and capital budgeting
- a reporting/briefing book for effective decision making

Comments from Past Attendees
“Stimulating and with an excellent speaker!” “Great way to get PD, excellent presenter with a sense of irreverent humor we all enjoyed.” “Great value - came away enthused and eager to apply new tactics.”

Seminar Leader
Dr. Vijay Jog

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Essential Topics for Controllers
LEVEL Introductory

Prerequisite
None

Overview
You've done that before, right? You can handle that for us, right? How many times as our career develops as a financial manager do we hear those statements? And how many times is “that” a task that you don't feel all that comfortable performing?

We are inundated in our professional training by opportunities to develop our technical, financial-based skills. However, as we move along in our career, we discover a whole other set of skills that need development. As a financial manager, those soft skills, as well as your technical abilities, will define your career and determine your advancement. This seminar will deal with seven topic areas that you will be expected to be proficient at, or at least have knowledge of, as your career progresses.

Who Should Attend
Financial professionals whose careers are developing beyond the accounting function towards supervision and management.

Content
Through practical tips and with a maximum one hour per topic, the following essential, career enhancing topics will be de-mystified
• conducting an employment interview
• strategic planning basics
• negotiating skills
• performance evaluations
• managing versus leading
• communication skills
• terminating an employee

Comments from Past Attendees
“Some very interesting topics.” “The topics were well covered. Just the right amount of information.” “The seminar was very good. Very useful information.”

Seminar Leader
Keith Martin, CPA, CA, MBA

Improving Financial Performance for Controllers and CFOs
LEVEL Intermediate

Prerequisite
None

Overview
There is more and more pressure to do things better, smarter, and cheaper. This seminar will help the finance professional improve financial performance by dealing with short-term issues such as reducing expenses and increasing cash flows; changing internal procedures and process to help the business prosper; and understanding the changing business environment to be prepared for the future.

This fast-paced one-day seminar combines lectures and problem-solving workshops. You will be exposed to novel ideas, hone your analytical skills, and be able to develop practical solutions for your organization.

Who Should Attend
Financial directors, managers, controllers, CFOs and advisors who want to help their organizations and/or clients survive and prosper.

Content
• setting the stage
  - cycles and history
  - new economic order
  - financial and economic models
• profit improvement
  - cash management
  - expenses and soft costs
  - banking and bankers
  - managing receivables
  - managing payables
  - capital expenditures
• process improvement
  - finance and accounting: function and reporting
  - internal control and risk management
  - practical approach to enterprise risk management
  - management tools
  - reinvigorating the strategic process
• conclusion
  - ideas to follow up

Comments from Past Attendees
“Jeffrey was knowledgeable, entertaining and had great real-life examples.” “Practical solutions and tips.” “Interesting information.”

Seminar Leader
Jeffrey Sherman, MBA, CIM, FCPA, FCA

Dec 07 9am-5pm  Four Seasons, Vancouver [A73250A_VA]
Fee $450 PD Passport Valid 1 Passport Day 7 CPD Hours
Internal Control Refresher for Financial Managers
LEVEL Intermediate

Prerequisite
None

Overview
When was the last time you looked at your organization’s internal controls? This fast-paced seminar provides financial managers with an interesting refresher on control, through videos, case studies and discussion. Content includes what business life would be like without control, the COSO internal control framework, and case studies of controls gone wrong.

You will leave with a deeper understanding of internal control and with some new ideas on innovative approaches to internal control.

Who Should Attend
CPAs in industry, including financial managers, supervisors and controllers, who want to improve their organization’s efficiency and effectiveness, and CPAs who advise clients.

Content
• COSO framework and how to apply it
• improving and implementing controls
• internal control, ISO and quality
• controlling the budget process
• spreadsheet controls
• getting buy-in across the organization

Seminar Leader
Jeffrey Sherman, MBA, CIM, FCPA, FCA

Dec 08 9am-5pm Four Seasons, Vancouver (A72256A_VA) Fee $450 PD Passport Valid 1 Passport Day 7 CPD Hours

Lenders, Banking & Your Client
LEVEL Intermediate

Prerequisite
None

Overview
Many professionals face such questions as what do bankers look for? What is a risk adjudicator? What criteria do financial institutions rely on in assessing applications for commercial credit? How do lenders structure term sheets, offers of finance, and credit agreements? What is standard, what is negotiable and what is not? This is a hands-on seminar designed to introduce accounting professionals to the seemingly impenetrable world of commercial lending. This seminar has been updated to reflect the new economic reality and to give you the information you need to better manage borrowing relationships through this economy.

It will help you to better understand what your lender wants, and, in turn, how you can help your client or company better negotiate its borrowing facilities.

Who Should Attend
Accounting professionals who want to know more about the world of commercial lending.

Content
• the range of debt products – senior vs. subordinated debt
• sales vs. risk management – the banking dilemma
• what is a “bankable” deal?
• due diligence
• pricing & fees, repayment structures, security, standard covenants, and required financial reporting
• monitoring post-disbursement
• subsequent rounds of financing – what to expect

Comments from Past Attendees
“Excellent material and presentation.” “Very knowledgeable, very experienced, excellent presenter.” “Lots of different examples, good open discussion.”

Seminar Leader
Kristi Miller, MBA

Dec 07 1:30pm-5pm Sutton Place, Vancouver (A72053A_VA) Fee $220 PD Passport Valid 1/2 Passport Day 3.5 CPD Hours
Management Accounting Refresher  
LEVEL Introductory

**Prerequisite**
None

**Overview**
This seminar provides participants with an overview of key concepts and decisions in management accounting. You will gain an understanding of the variety of management accounting information available within an organization, the decisions that are impacted by management accounting and an improved ability to understand issues and communicate with others regarding management accounting concepts. A case study is used throughout the seminar to help you apply these concepts in a practical scenario. You will leave this seminar with a refreshed grasp of management accounting concepts, including different types of costs and cost behaviour, job order and activity-based costing, decision-making using management accounting information and much more.

**Who Should Attend**
Professionals interested in a refresher on key concepts and decisions using management accounting information.

**Content**
- types of costs and cost behaviour
- job order and activity-based costing
- cost volume profit (CVP) analysis, budgeting, transfer pricing
- decision-making, using management accounting information (e.g. make or buy, add or drop, scarce resource allocation)
- performance management (e.g. the balanced scorecard, value chain analysis)
- communication with non-financial managers

**Comments from Past Attendees**
“Very well done.” “Practical examples.”

**Seminar Leader**
Erin Rao, CPA, CA

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Powerful Financial Analysis  
LEVEL Introductory to Intermediate

**Prerequisite**
None

**Special Note**
This workshop is highly interactive. Participants will work on exercises in order to learn through hands-on practice. It is highly recommended that participants bring a calculator with them to obtain maximum benefit.

**Overview**
Does part of your role or those you supervise involve financial analysis? In today’s fast-paced corporate world, financial analysis can mean many things. This seminar will cover the key facets of a financial analyst’s role within an accounting department and help analysts further their career by providing meaningful information to those around them.

**Who Should Attend**
Financial analysts within an accounting department or a business unit and those who are responsible for reviewing cost centre reports, monthly reports, budget reports and other variance reports. It is intended for accountants working within companies rather than public practitioners.

**Content**
- what is financial analysis?
- role of financial analysis in the finance function
- month-end analysis
- quarter-end analysis and year-end analysis
- budget analysis
- cost analysis
- ratio analysis
- overall financial statement analysis
- Altman’s Z-score

**Comments from Past Attendees**
“Very excellent presenter and seems to be able to keep her audience captivated.” “Overall, a useful seminar and insights into new ways of thinking about FP&A.” “Excellent seminar – the day was full of good information.”

**Seminar Leader**
Karine Benzacar, MBA, FCPA, FCMA, CFA
Practical Tips for Controllers & CFOs
LEVEL Intermediate

Prerequisite
None

Overview
This seminar provides a wide range of useful tips for use in your work – tips that are not normally found in seminars or textbooks. These are illustrated with interesting anecdotes and examples. Participants will also derive value from sharing experience and practices with each other, and benchmarking your practices with those of your peers.

Who Should Attend
Accountants in leadership positions, such as Controllers, CFOs and directors of finance, and those moving toward these roles, as well as those in public practice or consulting, who advise clients. Accountants from large companies, government and not-for-profits also find the seminar useful.

Content
• great tips on key indicator reporting
• getting the most out of your bank
• cash flow crisis – what to do when it happens
• cost-cutting tips
• M&A, the good, the bad and the ugly
• the fast close
• system conversion dos and don'ts
• more creative thinking for accountants
• auditors and lawyers – minimizing costs
• more useful financial reporting

Ethics Content
This seminar contains 0.5 hours of ethics content.

Comments from Past Attendees
"Seminar covers most of the issues faced by a Controller/CFO on a daily basis – very practical and useful." "Excellent seminar. The facilitator was interested in helping others meet their needs." "Seminar leader provided useful practical tips in an enjoyable manner." "I very much enjoyed the practical nature of this course."

Seminar Leader
Stephen Priddle, CPA, CA, CMA

Process Improvement and Mapping
LEVEL Introductory

Prerequisite
None

Special Note
This is a hands-on course. Participants are required to bring a laptop with Microsoft Visio installed to the class.

Overview
Accountants are often called upon to review business processes to ensure they are functioning effectively and efficiently. This one day workshop aims to provide participants with an understanding of the fundamental principles of process mapping and documentation so as to better map, monitor and improve internal systems and processes within their organizations. Participants will be encouraged to adopt a mindset of continuously seeking improvement opportunities and will come away with some practical skills on how to use Microsoft Visio to map processes.

Who Should Attend
Individuals working in industry or public practice who are seeking to enhance their understanding of business processes.

Content
• how to identify critical processes
• process mapping fundamentals and best practice techniques
• key elements of process improvement
• how to evaluate process efficiency and effectiveness through use of swim lane diagrams to assess hand-offs and other process inefficiencies
• risk management and compliance including root cause analysis
• managing a process mapping project
• creating system and process maps from a narrative case study, using Microsoft Visio

Comments from Past Attendees
"I find it to be a very well put together presentation, excellent use of hands-on example, good pace and approach." "I really enjoyed it and found it useful."

Seminar Leader
Chris Wyman, CPA, CMA, CIA, CRMA

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Finance

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Budgeting & Financial Management: Beyond Traditional Budgeting

LEVEL Intermediate

Prerequisite
A basic understanding of the budgeting process.

Overview
This seminar will move beyond the basics of budgeting and explore whether the traditional budgeting process remains relevant. It will explore current common budget practices and evaluate their effectiveness in meeting the needs of organizations. Progressive budgeting practices in use internationally will be explored and compared with the traditional budgeting process. Participants will gain an understanding of the budgeting tools available to enable a budgeting process that provides the greatest value to their organization.

Who Should Attend
Individuals involved in developing budgets and forecasting, or interested in alternative approaches to improve the value creation and strategic impact of the budget process. Managers responsible for delivering organizational objectives and targets, or responsible for preparing and controlling departmental budgets.

Content
- adjust the focus of the finance function from purely controlling to value creation
- align budgeting with strategy development
- reduce the cost and time of the budgeting process
- consider tools to use in place of traditional budgeting tools
- advice on how to implement a new approach to planning and performance management
- cash flow forecasting
- methods for revenue and cost projections
- alternative approaches to capital allocation

Seminar Leader to be drawn from
Scott Powell, CPA, CA
Bon Trathen, CPA, CA

Nov 07 9am-5pm Hyatt Regency, Vancouver (A73031C_VA)
Nov 14 9am-5pm Sheraton Guildford, Surrey (A73031D_SU)
Nov 15 9am-5pm Quality Hotel, Abbotsford (A73031E_AB)
Nov 25 9am-5pm Ramada Hotel, Kelowna (A73031F_KE)
Nov 28 9am-5pm Ramada Hotel, Prince George (A73031G_PG)
Dec 05 9am-5pm Marriott Inner Harbour, Victoria (A73031H_VI)
Feb 22 9am-5pm Sutton Place, Vancouver (A73031I_VA)
Fee $425 PD Passport Valid 1 Passport Day 7 CPD Hours
Business Valuations: The Basics
LEVEL Introductory

Prerequisite
None

Special Note
Please bring a calculator as it may be used during class.

Overview
This full day seminar provides participants a practical insight into business valuation. Participants will learn about and apply valuations tools such as the capitalized cash flow (CCF) approach and the discounted cash flow (DCF) approach to business case studies. The seminar also focuses on business valuation interpretation and the mechanics of the valuation process.

Who Should Attend
Those in industry and practitioners with limited to no valuation experience who are seeking a better understanding of business valuation principles and practices.

Content
• overview of valuation methodologies and how to apply them to a real business
• CCF and DCF valuation techniques and application
• calculating maintainable earnings
• determining capitalization and discount rates
• enterprise value versus equity value
• market valuation approaches using equity value and enterprise value multiples

Comments from Past Attendees
“Breath of material was good, good stepping stone to advanced course.” “It was very relevant to what I want to do, and it was challenging enough. Really good takeaway as well with the binder.”

Seminar Leader to be drawn from
Brad Hall, CPA, CA, CBV
Fred Tang, CPA, CA, CBV
Ian Wanke, CPA, CA, CFA, CBV

Fee $425 PD Passport Valid 1 Passport Day 7 CPD Hours
Business Valuations: Beyond the Basics
LEVEL Advanced

Prerequisite
Business Valuations: The Basics

Special Note
Please bring a calculator as it may be used during class.

Overview
Building on the concepts of Business Valuations: The Basics, this seminar gives participants a more detailed insight into some of the more complex issues associated with business valuations. Participants are introduced to topics such as valuation discounts, valuing intangible assets, and valuing securities other than common shares.

Who Should Attend
Those in industry and practitioners who are seeking a deeper understanding of the more complex issues surrounding business valuation.

Content
• complexities associated with DCF valuation methods and how to assess the reasonableness of cost of capital, cash flow, and residual value assumptions
• valuing a business using multiples
• valuation and buyer intent - strategic buyers versus financial buyers
• identifying and valuing synergies
• applying valuation discounts, including minority interest, marketability, and key person
• valuing intangibles assets

Comments from Past Attendees
"Instructor was an excellent speaker, not only explained the topic well, but made it very interesting. And the material was the best I’ve seen in a long time - an excellent resource for future issues." “Good discussions around the topic area.”

Seminar Leader to be drawn from
Brad Hall, CPA, CA, CBV
Fred Tang, CPA, CA, CBV
Ian Wanke, CPA, CA, CFA, CBV

Oct 27 9am-5pm Coast Capri, Kelowna [A73010B KE]
Nov 07 9am-5pm Van Conv Ctr West, Vancouver [A73010C VA]
Dec 07 9am-5pm Coast Hotel, Kamloops [A73010D KA]
Dec 13 9am-5pm Marriott Inner Harbour, Victoria [A73010E VI]
Fee $425 PD Passport Valid 1 Passport Day 7 CPD Hours

Corporate Finance
LEVEL Introductory to Intermediate

Prerequisite
None

Overview
This workshop will focus on providing participants with a working knowledge of the various ways business activity, and mergers and acquisitions (M&A) in particular, can be assessed and financed through the capital markets. Participants will learn what form of funding a company will typically seek at each stage of its business life-cycle and understand the relative benefits of debt funding over equity funding, including and the role of equity capital markets (ECM) and debt capital markets (DCM) in delivering financing solutions. The key issues that a company faces at each stage of an M&A process will also be discussed.

Who Should Attend
Members in industry and practitioners who need a working knowledge of corporate finance or who need to update their corporate finance knowledge.

Content
• corporate finance jargon (e.g. sell side versus buy side; primary versus secondary capital markets, etc.)
• corporate finance valuation
• best practice M&A analysis
• acquisition finance alternatives
• senior and subordinated debt funding sources
• equity funding sources

This hands-on workshop is built around a series of applied case studies.

Comments from Past Attendees
"Excellent course with interesting delivery of content." “Very informative.” “Practical examples and real cases.” “I thought the presenter was very knowledgeable and I liked how he encouraged participants to give real life examples.”

Seminar Leader
Scott Powell, CPA, CA

Oct 25 9am-5pm Sheraton Guildford, Surrey [A73240A SU]
Nov 03 9am-5pm Four Seasons, Vancouver [A73240B VA]
Nov 09 9am-5pm Victoria Conf Ctr, Victoria [A73240C VI]
Nov 21 9am-5pm Coast Capri, Kelowna [A73240D KE]
Fee $425 PD Passport Valid 1 Passport Day 7 CPD Hours
Due Diligence for Acquisitions

**LEVEL** Intermediate

**Prerequisite**
Post-secondary level course in Finance or equivalent knowledge.

**Overview**
This seminar focuses on the core part of a mergers and acquisitions (M&A) project: how to plan, evaluate, analyze and then synthesize the information accumulated. The due diligence process has multiple objectives: deciding whether to proceed, providing a basis for pricing the transaction, and preparing for life after the deal is consummated.

**Who Should Attend**
Financial managers and accountants who have experience in M&A and would like fresh perspectives, those undertaking due diligence for the first time, and those on the receiving end of a due diligence review.

**Content**
- M&A process overview
  - M&A lifecycle
  - M&A dynamics
- planning for the transaction
  - corporate strategy and role of due diligence
  - due diligence approach
  - key agreements (non-disclosure agreements and letter of intent)
- financial review
  - quality of earnings and Normalized EBITDA
  - net working capital
  - net debt
- other due diligence areas (tax, HR, IT, legal, operation)
- closing the transaction
  - purchase agreement and purchase price adjustments
  - integration matters
- common findings and conclusion

**Comments from Past Attendees**
“Good, high level overview of the topic.” “This was a highly interesting and informative seminar.” “Instructors very knowledgeable, bringing practical real life examples to discussion.”

**Seminar Leaders**
Aleem Jinnah, CPA, CA, CBV
Sandra Suh, CPA, CA, CBV

**Fee** $425
**CPD Hours** 7

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Corporate Treasury Management

**LEVEL** Intermediate

**Prerequisite**
Post secondary level course in Finance or equivalent knowledge.

**Overview**
The treasury function has evolved from traditional cash and liquidity management to a more strategic function encompassing broader working capital, corporate finance and risk management activities. In this seminar, participants will complete a journey that begins with the overall role of treasury and its relationships to financial service providers and internal stakeholders, and then continues with understanding its role in financial planning and analysis, managing working capital, optimizing cash and liquidity, including payments, money movement, capital markets, borrowing and investing transactions. Cash forecasting methods, ways to identify various risks and financial management, and treasury operations and controls round out the general topics covered. Corporate treasury management provides important insights for organizations of all sizes: large organizations with separate treasury departments as well as smaller companies where the treasury functions are carried out by finance and accounting staff.

**Who Should Attend**
Corporate finance and treasury professionals, internal and external auditors, consultants, accountants, controllers, CFOs, practitioners and those looking for an introduction to treasury.

**Content**
- the corporate treasury management function
- financial planning & analysis
- working capital management
- cash & liquidity management
- capital markets
- treasury operations and controls
- operational and enterprise risk management
- information technology in treasury

**Comments from Past Attendees**
“The course materials will be a useful addition to my professional library.” “Overall, an excellent presentation of technical material in an easy to understand manner.” “Great refresher on corporate finance.” “Well presented, seminar leader was very knowledgeable.”

**Seminar Leader**
Jeffrey Sherman, MBA, CIM, FCPA, FCA

**Fee** $425
**CPD Hours** 7
Financing Strategies
LEVEL: Intermediate

Prerequisite
Post-secondary level course in Finance or equivalent knowledge.

Overview
The objective of this seminar is to provide an in-depth review of the various forms of financing to fund capital projects, acquisitions or to restructure an existing capital structure. The seminar will delve into the practical details of what capital providers are seeking, issues that arise, and how companies should prepare themselves to execute a financing transaction. Through real-life examples, identifying common pitfalls, highlighting key elements and case studies, the seminar will put financial executives in a better position to seek and negotiate with capital providers.

Who Should Attend
Controllers, chief financial officers, chief executive officers and other financial executives who provide input into, or take the lead, in undertaking a financing transaction within their own enterprises.

Content
• overview of financing strategy and capital markets
• current state of the capital markets, including benchmarks and rules of thumb regarding realistic financing parameters
• basic capital structure elements
• discussion of various forms of financing, including:
  - government financing
  - operating lines and term debt
  - mezzanine and subordinated debt
  - Real estate financing
  - private equity
  - public equity and convertible debentures
• understanding cost of capital
• cost of capital and investment decisions
• financing process and negotiating strategies

Comments from Past Attendees
"Excellent course notes, valuable reference." "Good balance of broad and specific. Course binder will be a valuable reference." "A well developed course based on experienced instructors' knowledge."

Seminar Leaders
Ian Wanke, CPA, CA, CFA, CBV
Benjamin Salopek, B.Comm (Hons)

Did you know?

Canada-BC Job Grant
Employers in BC can apply for the Canada-BC Job Grant. This cost-sharing program can provide up to two-thirds of the cost of training new and current employees up to a maximum of $10,000 per grant. For details, please go to: www.workbc.ca/canadabcjobgrant

CPABC Tax Courses Accredited by the Law Society of BC
Beginning in 2012, CPABC PD tax seminars are accredited by the Law Society of British Columbia. Practicing BC lawyers can now earn CPD credits by attending tax seminars offered through CPABC PD.

Early Registration
We strongly encourage members to register early. Early registration will not only ensure your space in some of our highly popular seminars, but will also prevent seminars with lower enrolment from being cancelled.

Waitlists
The maximum number of participants in a seminar is dependent on the type of presentation and delivery format set by the course author and/or instructor. Although we try to accommodate as many requests as we can, we do not want to compromise the ability of our instructors to teach effectively. If a seminar is already full, you can request to be waitlisted.

Attire at PD Seminars
While there is no official dress code at our seminars, the majority of attendees arrive in business casual attire. As meeting room temperatures fluctuate throughout the day, it is advisable to dress in layers.

Scent-Aware Environment
Some individuals are more sensitive to certain scents and the chemicals used to create those scents. We ask that registrants be more scent-aware before attending our seminars, and minimize the use of fragrances as a courtesy to everyone sharing the same learning space.

Lunch & Coffee Service at Seminars
Coffee service is provided at all seminars. Lunch is provided only at full-day seminars. Breakfast is not provided except at Executive Breakfast seminars, and at certain PD events that begin earlier in the morning.

Special Dietary Requirements
We will do our best to accommodate requests for special dietary considerations for attendees who have food allergies, as well as vegetarian or vegan requests, but please note that personal preferences, such as a preference for one type of protein over another, will not be accommodated.

Please inform us at the time of registration if you have any food allergies (NOT preferences). We will pass along your name and information to the catering staff at the seminar facility and you will need to identify yourself to the server at lunch time. Note that this only applies to full-day seminars where lunch is provided.

Late Arrivals
If you arrive late, you should complete and submit the Late Arrival Card, provided with the course material, to the instructor. This ensures you will receive the CPD credit for the time you were in attendance.

Teaching for CPABC PD
We are always looking for members and other professionals to develop and teach seminars for our PD Program. If interested, please contact the PD Department at pdreg@bccpa.ca
Advanced Data Magic with Excel

LEVEL Advanced

Prerequisite
Intermediate knowledge of Excel.

Special Note
This is NOT a hands-on seminar, but feel free to bring your laptop with Excel 2007 or newer if you wish to follow along. It will focus on Excel for Windows and is not intended for Excel for macOS. It will be taught in Excel 2016, but reference will be made to the differences between Excel 2016 and Excel 2013, 2010, and 2007. PowerPivot is not available in Excel 2007, is a free download from Microsoft.com for Office 2010, and only available in Office 2013 Professional Plus or Office 365 ProPlus versions. This is a paperless seminar – see page 21 for details.

Overview
This seminar will provide you with a clear understanding of how to use the many advanced tools in Excel that few users take advantage of. It will clarify some key Excel misunderstandings and will discuss how advanced Excel functions can improve calculating skills. It includes in-depth coverage on how to bring data into Excel from an outside source, as well as Excel’s data analysis tools, including advanced lookups. It will then dive into array formulas and PowerPivot.

Who Should Attend
Intermediate to advanced users who want to further their Excel skills to the next level. Note that users of Excel 2007 will be able to complete all of the topics covered in the course, with the exception of the fifty minutes on PowerPivot.

Content
- how Excel calculates; creating custom formats; date arithmetic
- Excel functions such as AND, OR, CHOOSE, INDEX, MATCH and INDIRECT
- access external data such as importing from ACCESS, importing from other file types, using Microsoft Query
- data analysis tools such as Goal Seek, Data Tables, Scenario Manager and Solver
- the power of lookups, VLOOKUPS with IFERROR, VLOOKUPS with wild cards, combining VLOOKUPS and doing a VLOOKUP across multiple sheets
- using array formulas to simplify complex calculations, including single, multi-cell, comparative arrays, conditional formatting
- discover the power of Excel PowerPivot, Power View, Data Models, DAX calculations and Power Map that is available in Excel 2013 Pro Plus and 2016 Pro Plus

Seminar Leader to be drawn from
Karen Granville, Hons. BMath
Marion Williams

Dec 01 9am-5pm Sutton Place, Vancouver [C73380B_VA]
Feb 26 9am-5pm Sutton Place, Vancouver [C73380C_VA]
Mar 14 9am-5pm Marriott Inner Harbour, Victoria [C73380D_VI]
Fee $450 PD Passport Valid 1 Passport Day 7 CPD Hours
Advanced Excel Reporting: Best Practices, Tools, and Techniques
LEVEL Introductory to Intermediate

Prerequisite
Strong working knowledge of Excel 2007 or newer.

Special Note
This is NOT a hands-on seminar, but feel free to bring your laptop with Excel 2007 or newer if you wish to follow along. It will focus on Excel for Windows and is not intended for Excel for macOS. It will be taught in Excel 2016, but reference will be made to the differences between Excel 2016 and Excel 2013, 2010, and 2007. This is a paperless seminar – see page 21 for details.

Overview
If you need to build advanced Excel reports, including reports where the source data resides in your accounting software or another database, then this seminar should be on your list! You will learn how to use Open Database Connectivity (ODBC) and Online Analytic Processing (OLAP) to connect Excel to external data sources, such as your accounting software database, to extract data for reporting and analysis. You will also learn how to incorporate PivotTables into your reporting routines, including how to add calculations to your PivotTables, group PivotTable data into fiscal reporting periods, and filter your PivotTables using Slicers. You will also learn best practices for presenting compelling and captivating Excel-based reports and charts, and how to use two Excel add-ins – BizNet's Excel Business Information Suite and Microsoft's Power Pivot – to streamline and automate many of the manual processes associated with building Excel-based reports.

Who Should Attend
Many accounting and financial professionals spend far too much time in Excel accessing and converting financial data into useful reports. If there is the chance you may not be taking full advantage of all that Excel has to offer as a reporting tool, then you should make plans to participate in this program.

Content
• link and import data from external databases – including multi-table databases – into Excel
• use Tables and PivotTables to create accurate financial reports and analyses
• list and apply Excel shortcuts for formatting financial reports
• implement Excel templates to improve reporting productivity
• identify opportunities to work with third-party tools to streamline reporting in Excel

Seminar Leader
Marion Williams

Advanced PivotTables, Including PowerPivot
LEVEL Advanced

Prerequisite
Full understanding of intermediate to advanced PivotTables.

Special Note
This is NOT a hands-on seminar, but feel free to bring your laptop with Excel 2007 or newer if you wish to follow along. It will focus on Excel for Windows and is not intended for Excel for macOS. Many of the concepts taught depend upon access to PowerPivot, available only in the Professional Plus editions of Excel 2013 and Excel 2016. It will be taught in Excel 2016, but reference will be made to the differences between Excel 2016 and Excel 2013. This is a paperless seminar – see page 21 for details.

Overview
PivotTables are Excel's most powerful feature. Designed for those who already work extensively with PivotTables, this seminar will show how you can do even more with PivotTables to summarize, report, and analyze potentially very large volumes of data. Learn how to build PivotTables from Data Models and how to leverage PowerPivot to take advantage of even more advanced features and functions, such as Data Analysis Expressions, Key Performance Indicators, Hierarchies, Dimensions, and OLAP reporting. If you currently use PivotTables on a regular basis and want to take advantage of the powerful advanced features available in this tool, then this seminar will elevate your skills.

Who Should Attend
Business professionals using premium editions of Excel 2013 and Excel 2016 who are seeking to extend their knowledge of PivotTables.

Content
• define Data Models and build PivotTables from these objects
• create PivotTables using PowerPivot, including PivotTables that summarize data from multiple data sources
• utilize Data Analysis Expressions and other tools to add calculations to PivotTables
• add features such as Key Performance Indicators, Dimensions, and Hierarchies to PivotTables

Seminar Leader
Ward Blatch, CPA, CA

Nov 27 9am-12:30pm Sutton Place, Vancouver [C72047A_VA]
Fee $220 PD Passport Valid 1/2 Passport Day 3.5 CPD Hours

Dec 04 9am-12:30pm Coast Hotel, Kamloops [C72037A_KA]
Feb 21 1:30pm-5pm Sheraton Guildford, Surrey [C72037B_SU]
Fee $220 PD Passport Valid 1/2 Passport Day 3.5 CPD Hours
**Building a Financial Model of a Company**  
**LEVEL Intermediate**

**Prerequisite**  
Fundamental knowledge of accounting and capability working with Excel.

**Special Note**  
This is a hands-on seminar. Please bring a laptop with Excel (any version) installed.

**Overview**  
This hands-on course focuses on the skills required to design and create an interactive financial model of a company that adheres to the highest industry standards. It will cover model design, logic, construction, financial concepts and accounting treatment. During the seminar, participants will build a model that includes a forecast of a company's income statement, cash flow statement and balance sheet.

**Who Should Attend**  
Those who want to design and create a dynamic financial model of a company that adheres to the highest industry standards.

**Content**  
- design and structure a financial model  
  - design and layout a financial model clearly and logically  
  - discuss the need for a model to serve as a marketing tool  
  - create clearly defined inputs and assumptions sections  
  - connect strings of data to create assumptions and footnotes  
- build powerful scenarios and financial statements  
  - use switches to create effective scenarios and value drivers  
  - forecast and build-up a company’s revenues and expenses  
  - design and incorporate a company’s income statement, balance sheet and cash flow statement  
- incorporate all relevant schedules  
  - construct all necessary schedules, including: depreciation/CAPEX schedule; working capital schedule; income tax schedule; debt and interest schedule; shareholders’ equity schedule  
  - use Lookup functions within the model to effectively extract information  
  - properly incorporate Senior Term Debt with an amortizing repayment schedule  
  - create a robust Bank Operating Line (or Revolving Credit Facility)  
  - design and incorporate a cash sweep for a company’s Bank Operating Line  
  - balance the company’s balance sheet

**Seminar Leader**  
The Marquee Group

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**An End to Manual Effort in Excel: Power Query**  
**LEVEL Intermediate**

**Prerequisite**  
Strong working knowledge of Excel’s basic functions as well as working knowledge of pivot tables.

**Special Note**  
This is a hands-on seminar. Please bring a laptop with one of the programs listed below.  
- Excel 2010 and the free Power Query download  
- Excel 2013 and the free Power Query download  
- Excel 2016 (Power Query is built in to the product)

**Overview**  
The sad reality is that not all data is stored in nicely curated databases and often - even when it is - the data analyst doesn’t have access. Instead we have to piece together data provided in text files, Excel files, web pages and even the body of emails to build the business intelligence solutions we need. Until now this has been a painful process with a great deal of cut and paste effort, and updates have been tedious and error prone. That stops today.

In this course, you’ll learn how Power Query can clean up, reshape and combine your data with ease. Converting ASCII files into tables, combining multiple text files in one shot and even un-pivoting data is not only simple, but an investment in the future, refreshable with a single click when next needed.

**Who Should Attend**  
Anyone who needs to pull data into Excel, clean it up and/or consolidate it. Please note that you must bring your own laptop, and ensure you have all the prerequisites listed above before attending the seminar.

**Content**  
- import data from text files and web pages  
- append data from one table to another  
- merge two data sets together  
- import all files in a folder in one shot  
- un-pivot tables with ease  
- create dashboards from email in minutes

**Comments from Past Attendees**  
“Excellent instructor, very funny and helpful and really knew his topic.” “Would recommend for anyone who wants to learn about power query!” “Very good topic and very useful information.” “Highly educational and very enjoyable.”

**Seminar Leader**  
Ken Puls, FCPA, FCMA

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Cloud Computing
LEVEL: Intermediate

Prerequisite
Fundamental knowledge of computer operations and internet usage.

Special Note
This is NOT a hands-on seminar. This is a paperless seminar – see page 21 for details.

Overview
"Cloud Computing." You’ve heard the term, but what does it really mean and how will it impact you both personally and professionally? In this seminar, you will learn the fundamentals of cloud computing, including what cloud computing really is. The course then shifts into a discussion to help you understand if cloud computing might be right for your organization or for your clients. Learn about the leading providers of cloud-based services and which of their solutions might be right for your organization or for your clients. Leading solutions from organizations such as Azure, Microsoft, Google, Zoho, Thomson Reuters, CCH, Intuit, Intacct, Sage, Salesforce.com, Wave, XCM Solutions, Bill.com, VMWare, Amazon, Concur, Cloud9 Real Time, HubDoc and many others will be reviewed to help you understand the opportunities that exist today to move your organization forward and begin increasing the return on your investment in technology. A special focus of this seminar is the impact that cloud computing will have on the accounting profession.

Who Should Attend
Accountants and other business professionals who wish to enhance their knowledge of leading-edge technologies such as cloud computing.

Content
• distinguish between cloud computing services
• determine if cloud computing is right for your organization
• identify the major cloud computing vendors and the key solutions provided by each of these vendors
• develop a road map for selecting a cloud-based solution and migrating to it
• potential pitfalls associated with cloud-based solutions – such as security and data availability – and identifying means of avoiding these hazards
• investigate data storage in the cloud

Seminar Leader
Ward Blatch, CPA, CA

Creating Vibrant Dashboards
LEVEL: Intermediate to Advanced

Prerequisite
Fundamental knowledge of Excel.

Special Note
This is a hands-on seminar. Please bring a laptop with Excel 2007 or higher.

Overview
How many times, after presenting the statements you’ve worked so hard on, do your audiences’ eyes glaze over? It’s awful, but it highlights something really important … often the way we present our work isn’t ideal.

In this seminar we’ll look at different ways to present our information, telling a story using effective data visualization tools in Excel. We’ll examine charts, graphs, conditional formatting and other techniques, pulling the results into a dynamic and engaging dashboard; a one-stop report that gives us an overview of the key metrics we want to see for a hypothetical business need.

Who Should Attend
Accountants and other professionals who need to be able to share information visually and engage their audience.

Content
This seminar will focus on strategies and tools that can be used to summarize key business metrics for presentation, including
• best practices rules for creating effective charts
• building basic charts (line and bar)
• modifying chart elements
• creating combination charts
• building interactive charts
• advanced chart types
• conditional formatting tools and tricks
• custom number formatting techniques
• putting them all together in a dashboard

Comments from Past Attendees
"Excellent seminar! Awesome instructor." “Instructor was very knowledgeable and had great passion for the subject!” “Very interesting and engaging.”

Seminar Leader
Ken Puls, FCPA, FCMA
Data Analysis Expressions with PowerPivot
LEVEL Advanced

Prerequisite
Fundamental knowledge of and capability working with Excel 2010 or newer. In addition, please see Special Note below.

Special Note
This is a hands-on seminar. Please bring a laptop with one of the programs listed below.
• Excel 2010 and the free Power Pivot download
• Excel 2013
• Excel 2016
Please carefully check the software to ensure that Power Pivot is installed and available before arriving at the course.

Overview
PowerPivot is revolutionizing the way that we look at data inside Microsoft Excel. Allowing us to link multiple tables together without a single VLOOKUP statement, it enables us to pull data together from different tables, databases and even external sources, where we never could before. But linking data from multiple sources, while powerful, only scratches the surface of the impact that it is making in the business intelligence landscape. Have you ever wanted to have a field on your pivot table that shows month to date for the same month last year? To get the most from PowerPivot you need to understand DAX, a structured language for querying data. With that knowledge, you can create measures and calculated fields that you never thought possible, and build models that are quick to calculate and easy to maintain.

Who Should Attend
Accountants and data professionals who are responsible for building business intelligence reports.

Content
This seminar covers
• building a PowerPivot data model
• sorting and filtering PowerPivot models
• how the DAX engine calculates measures and calculated fields
• understanding “Filter Context”
• building basic DAX measures from scratch
• incorporating conditional logic using HASONEVALUE() and CALCULATE()
• building measures to look at different date contexts
• performance considerations

Seminar Leader
Ken Puls, FCPA, FCMA
Dec 06 9am-5pm Coast Capri, Kelowna [C73030B_KE]
Dec 11 9am-5pm Van Conv Ctr West, Vancouver [C73030C_VA]
Fee $450 PD Passport Valid 1 Passport Day 7 CPD Hours

Excel: Beyond the Basics
(formerly Excel Advanced)
LEVEL Advanced

Prerequisite
Intermediate knowledge of and capability working with Excel 2007 or newer.

Special Note
This is NOT a hands-on seminar, but feel free to bring your laptop with Excel 2007 or newer if you wish to follow along. It will focus on Excel for Windows and is not intended for Excel for macOS. It will be taught in Excel 2016, but reference will be made to the differences between Excel 2016 and Excel 2013, 2010, and 2007. This is a paperless seminar – see page 21 for details.

Overview
If you are an experienced Excel user seeking to elevate your skills, this laptop-friendly seminar will help you learn critical advanced Excel skills in six key areas: collaborating with other users and securing workbooks; using tables to analyze and report data; integrating and manipulating data from external sources; creating and auditing complex formulas; advanced data analysis tools; and visualization techniques to analyze and communicate information. The content of this course draws from over twenty-five years of experience in delivering Excel training to accountants and other business professionals. This course covers advanced Excel topics found in Excel 2007 through Excel 2016.

Who Should Attend
Accountants and business professionals who work with Excel 2007 or newer, and who want to extend their knowledge with advanced features and functions.

Content
• the best techniques to secure sensitive information in Excel workbooks and collaborate with other users to improve accuracy and efficiency
• create tables and take advantage of their advanced features, such as dynamic data ranges, structured reference formulas, and the ability to relate multiple tables together into a Data Model
• import and link data into Excel from external sources – including text, Access, and SQL Server – and use advanced tools, such as Power Query and various cleanup tools
• advanced functions, such as SUMPRODUCT, VLOOKUP, HLOOKUP, MATCH, INDEX, NETWORKDAYS, RAND, RANDBETWEEN, NPV, IRR, XNPV, and XIRR to create and audit complex formulas
• analyze worksheet data using techniques such as Data Tables, Subtotals, Slicers, Filters, and PivotTables
• techniques used to create, manipulate, and customize charts for analyzing and communicating information

Seminar Leader
Karen Granville, Hons. BMath
Nov 03 9am-5pm Ramada Hotel, Kelowna [C73100B_KE]
Feb 27 9am-5pm Sutton Place, Vancouver [C73100C_VA]
Fee $450 PD Passport Valid 1 Passport Day 7 CPD Hours
Excel: Integrating and Preparing Budgets & Forecasts
(formerly Excel Budgeting & Forecasting Techniques)
LEVEL Intermediate

Prerequisite
Fundamental knowledge of Excel 2007 or newer.

Special Note
This is NOT a hands-on seminar, but feel free to bring your laptop with Excel 2007 or newer if you wish to follow along. It will focus on Excel for Windows and is not intended for Excel for macOS. It will be taught in Excel 2016, but reference will be made to the differences between Excel 2016 and Excel 2013, 2010, and 2007. This is a paperless seminar – see page 21 for details.

Overview
Are your budgeting and forecasting processes working as well for you as they should? Probably not, as many organizations report that budgeting and forecasting activities consume tremendous amounts of time and yield only marginal benefits. In this course, you will learn how to achieve a greater return on your budgeting and forecasting activities by taking advantage of various tools and techniques. You will learn how to account for risk and uncertainty in your budgeting and forecasting models and why doing so is a best practice for more meaningful budgets and forecasts.

Who Should Attend

Content
• utilize processes for obtaining budget data and collaborating with others when using Excel including Shared and Merged Workbooks, Excel’s Audit Trail, controlling and validating data input, and collaborating with others
• apply various Excel techniques for interacting with the accounting system, such as Office Data Connections, Open Database Connectivity, importing text files, and linking Internet-based data into budgeting and forecasting models
• identify situations in which various Excel techniques are appropriately implemented, such as using Data Tables for sensitivity analysis, working with Excel’s Goal Seek feature, using Solver to maximize scarce resources, working with Scenario Manager, forecasting with Regression Analysis, and analyzing risk with Monte Carlo simulations
• implement various Excel functions – including NPV, IRR, XNPV, and XIRR – in capital budgeting situations, and identify the various methods by which Excel computes depreciation
• compare and contrast Excel with other applications used for budgeting and forecasting activities

Seminar Leader
Karen Granville, Hons. BMath

Fee $450 9am-5pm Sutton Place, Vancouver [C73070B_VA] PD Passport Valid 1 Passport Day 7 CPD Hours

Excel: Specific Skills for Budgeting, Planning and Forecasting
(formerly Excel Budgeting and Techniques Hands-on)
LEVEL Intermediate

Prerequisite
Fundamental knowledge of Excel 2007 or newer.

Special Note
This is a hands-on seminar. Sessions marked “Lab” will take place in a computer lab setting where desktop computers with the current Excel program installed will be provided. Sessions NOT marked “Lab” will require attendees to bring their own laptop with Excel 2007 or higher installed.

Overview
If you need help to improve budgeting, planning and forecasting processes in your business, then this hands-on workshop will help you apply specific skills in Excel to do just that. You will work with the many Excel features such as data consolidation for budgets, securing workbooks, forecasting and charting techniques for presentation of budgets.

Who Should Attend
CPAs, students, and accounting and business professionals who would like to gain more practical experience in Excel reporting and using statistical data. Those interested in financial modeling in Excel may wish to take Excel Financial Models and Analysis instead.

Content
• best practices for designing budget templates
• Excel features to secure worksheets for sharing and collaboration
• ‘what-if’ analysis tools for forecasting and planning
• consolidate multiple budgets with PivotTables
• chart techniques for budget presentation
• consolidate data from multiple workbooks or worksheets
• simplify the budgeting process with Macros
• workbook sharing and collaboration with Office 365
• protect your worksheets

Seminar Leader
Richard Jang, BCom, DipIT, MCP, CPA, CGA

Oct 20 9am-5pm Quality Hotel, Abbotsford [C73320B_AB] Fee $450
Oct 24 (Lab) 9am-5pm UBC Robson, Vancouver [C73320C_VA] PD Passport Valid 1 Passport Day 7 CPD Hours
Jan 26 (Lab) 9am-5pm UBC Robson, Vancouver [C73320D_VA] Feb 16 9am-5pm Sheraton Guildford, Surrey [C73320E_SU]
Excel: Specific Skills for Creating Custom Solutions with Macros  
(formerly Excel Macros Hands-on)  
LEVEL Intermediate

Prerequisite  
Fundamental knowledge of Excel 2007 or newer.

Special Note  
This is a hands-on seminar.  
Sessions marked “Lab” will take place in a computer lab setting where desktop computers with the current Excel program installed will be provided. Sessions NOT marked “Lab” will require attendees to bring their own laptop with Excel 2007 or higher installed.

Overview  
Do you perform a task repeatedly in Microsoft Excel and have to remember each step? Do you wish you could just hit one single key? You can! We will show you how to automate the task with a macro. A macro is a string of instructions or keystrokes. With a single keystroke, you can play back these activities much faster than performing them manually. Macros are a wonderful timesaver and eliminate the risk of error that can typically occur when carrying out repetitive tasks. Discover the tools and techniques that will allow you to build customized Excel solutions for automating repetitive tasks, building financial models and integrating with Microsoft Word or Access.

Who Should Attend  
CPAs, students, accounting and business professionals who want to apply Excel’s Macro capabilities for creating custom Excel solutions for their business, quickly and efficiently.

Content  
• Visual Basic Editor - using it to create and manage your macros  
• record macros – advantages, limitations & improving the results  
• create custom user defined functions  
• the macro language and how to use it effectively for interacting with Excel, including how to create Excel forms for data input and interactive dashboards, and techniques for automating spreadsheets  
• apply macros for creating financial models and integrating Excel with other programs  
• debug macros – what to do when your macros misbehave

Seminar Leader  
Richard Jang, BCom, DipIT, MCP, CPA, CGA

Excel: The Next Level of Skills  
(formerly Excel Advanced Hands-on)  
LEVEL Advanced

Prerequisite  
Intermediate knowledge of and capability working with Excel 2007 or newer.

Special Note  
This is a hands-on seminar.  
Sessions marked “Lab” will take place in a computer lab setting where desktop computers with the current Excel program installed will be provided. Sessions NOT marked “Lab” will require attendees to bring their own laptop with Excel 2007 or higher installed.

Overview  
It is time to take your Excel skills to the next level! Discover the best features and functions in Excel to make your accounting and finance tasks easier, faster and more accurate. This hands-on workshop will provide you with the skills for creating and editing macros, conditional formatting and data validation. Learn how to bring data into Excel from databases and use PivotTables for creating presentations in Word and/or PowerPoint. This seminar will cover many advanced features of Excel to make your work easier and increase the sophistication of your data analysis and reporting.

Who Should Attend  
CPAs, students, and accounting and business professionals who want to learn advanced Excel features and functions, and their application to business.

Content  
• create Excel Tables and PivotTables for analysis and reporting  
• extract and manipulate data from data sets for PivotTables  
• ‘what-if’ analysis using Data Tables, Scenario Manager and Goal Seek  
• record and edit Macros with the Visual Basic Editor  
• integrate Excel with other Office programs such as MS-Word  
• consolidate data from multiple workbooks or worksheets  
• workbook sharing and collaboration with Office 365

Seminar Leader  
Richard Jang, BCom, DipIT, MCP, CPA, CGA

Oct 19 9am-5pm  Sheraton Guildford, Surrey  [C73290B_SU]  
Oct 27 9am-5pm  Executive Plaza, Coquitlam  [C73290C_CO]  
Oct 30 9am-5pm  Coast Hotel, Kamloops  [C73290D_KA]  
Nov 08 (Lab) 9am-5pm  UBC Robson, Vancouver  [C73290E_VA]  
Dec 06 9am-5pm  Ramada Hotel, Prince George  [C73290F_PG]  
Feb 23 (Lab) 9am-5pm  UBC Robson, Vancouver  [C73290G_VA]

Fee $450 PD Passport Valid 1 Passport Day 7 CPD Hours
Excel Boot Camp
LEVEL Intermediate

Prerequisite
Fundamental knowledge of Excel 2007 or newer.

Special Note
This is a hands-on seminar. Please bring a laptop with Excel 2007 or higher with you to the class. The seminar will focus on Excel for Windows and is not intended for Excel for macOS. It will be taught in Excel 2016, but reference will be made to the differences between Excel 2016 and Excel 2013, 2010, and 2007. This is a paperless seminar – see page 21 for details.

Overview
By using accounting-centric examples, developed for accountants by accountants, this intensive two-day program will take you through Excel from A to Z and show you how to elevate your use of Excel to the next level. In addition to long-standing features in Excel such as lookup functions, the Camera tool, and formatting options, this boot camp will highlight the number of recent improvements to Excel including additions to the function library, tables, a vastly improved charting engine, and an overhaul of PivotTable functionality. You will also learn various techniques for enhancing, not only your efficiency, but also your effectiveness, when working with Excel by taking advantage of a wide variety of “power features” to assist you in creating accurate spreadsheets in a fraction of the time previously required.

Who Should Attend
Accountants and users of Excel 2007 or higher who want to learn all the best features in an intensive training environment.

Content
• various tips, tricks, and techniques to address issues such as formatting, AutoCorrect, handling dates and times, and selecting cells with special characteristics
• Excel’s formula-building tools
• how and when Excel’s Table feature should be used
• complex formulas, including those containing arrays and SUMIFS, VLOOKUP, HLOOKUP, INDEX, and MATCH functions
• various techniques for securing Excel workbooks
• charts that captivate audiences and communicate effectively
• six components of PivotTables and create PivotTables, including functions
• the Camera tool in creating custom reports
• the Macro Recorder tool in creating simple, yet very useful, macros that you can put to work right away

Seminar Leader
Marion Williams

Nov 28-29 9am-5pm Sutton Place, Vancouver [C74020B_VA]
Mar 15-16 9am-5pm Sutton Place, Vancouver [C74020C_VA]
Fee $785 PD Passport Valid 2 Passport Days 14 CPD Hours

Excel Dashboards
LEVEL Advanced

Prerequisite
Intermediate knowledge of and capability working with Excel 2007 or newer.

Special Note
This is NOT a hands-on seminar, but feel free to bring your laptop with Excel 2007 or newer if you wish to follow along. It will focus on Excel for Windows and is not intended for Excel for macOS. It will be taught in Excel 2016, but reference will be made to the differences between Excel 2016 and Excel 2013, 2010, and 2007. This is a paperless seminar – see page 21 for details.

Overview
Dashboard reporting is rapidly becoming the norm for organizations seeking to improve financial and operational reporting processes. Dashboards allow recipients easy access to mission-critical data, usually in an on-demand environment, thereby allowing users to get the information they need when they need it. With greatly enhanced charting and graphing capabilities, along with the ability to handle much larger volumes of data, Excel is an ideal tool for creating high-impact dashboards in businesses of all sizes.

This seminar will show you how to build Excel-based dashboards that extract information from your accounting application along with other databases, and to present this data as actionable information in a dashboard setting.

Who Should Attend
Accountants and users of Excel 2007, 2010, 2013, or 2016 who want to learn how to use Excel to create dashboards.

Content
• building blocks of Excel-based Dashboards - open database connectivity, conditional formatting, tables, defined names and dynamic defined names, form controls, and Excel’s RANK function - and how to use each of these in an Excel-based Dashboard environment
• processes for creating, formatting, and manipulating charts in Excel including charts based on tables, charts with dynamic text boxes, charts with conditional formatting, interactive charts, sparklines, and drill down charts
• relevance of PivotTables and PivotCharts in an Excel-based Dashboard environment, and how to create PivotTables and PivotCharts based on tables as well as dynamic defined names
• how to assemble an Excel-based Dashboard using the components learned in this seminar

Seminar Leader
Marion Williams

Mar 12 9am-12:30pm Sutton Place, Vancouver [C72020B_VA]
Fee $220 PD Passport Valid 1/2 Passport Day 3.5 CPD Hours
Excel Financial Models and Analysis
LEVEL Advanced

Prerequisite
Intermediate knowledge of Excel 2007 or newer.

Special Note
This is a hands-on seminar. Sessions marked “Lab” will take place in a computer lab setting where desktop computers with the current Excel program installed will be provided. Sessions NOT marked “Lab” will require attendees to bring their own laptop with Excel 2007 or higher installed.

Overview
Financial models are mathematical models where variables are linked together to perform calculations. The calculations are analyzed, and based on the information retrieved, can be used to make business decisions. Excel provides an outstanding toolset for creating such financial models. This hands-on workshop will provide you with the skills to build financial models for use in decision-making, analysis and forecasting. We'll also work with the many BI features in Excel for reporting and presentation.

Who Should Attend
CPAs, students, accounting and business professionals looking to improve their skills using Excel for financial modeling, reporting and analysis. Those interested specifically in budgeting and forecasting may wish to take Excel - Specific Skills for Budgeting, Planning and Forecasting instead.

Content
- techniques for building flexible models in Excel
- audit tools to ensure model integrity
- make decisions under uncertainty using 'What-if' tools
- apply Excel's Scenario and Solver features to models
- use data tables and charts for analysis
- apply Macros to modeling and analysis
- build Executive Dashboards with Excel's BI Tools

Seminar Leader
Richard Jang, BCom, DipIT, MCP, CPA, CGA

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Fee $450 PD Passport Valid 1 Passport Day 7 CPD Hours

Excel Macros Demystified
(formerly Excel Macros)
LEVEL Introductory

Prerequisite
Strong working knowledge of Excel's basic functions.

Special Note
This is NOT a hands-on seminar, but feel free to bring your laptop with Excel 2007 or newer if you wish to follow along. It will focus on Excel for Windows and is not intended for Excel for macOS. It will be taught in Excel 2016, but reference will be made to the differences between Excel 2016 and Excel 2013, 2010, and 2007. This is a paperless seminar – see page 21 for details.

Overview
You have used Excel for years and Lotus prior to that. During this time, you have said repeatedly, “one day, I’ll learn how to write macros.” Well, that time has arrived because this half-day seminar will introduce you to the wide world of macros and Visual Basic for Applications (VBA) in Excel. You will learn how to use Excel's Macro Recorder to write simple, yet effective, macros; secure and share macros with other Excel users; create user-defined functions to solve specific accountant-centric problems in Excel; and create macros that run automatically when a user opens a workbook.

Who Should Attend
Accounting and financial professionals in all facets of the profession seeking to extend Excel's functionality with simple, yet highly-effective, macros.

Content
Designed for those with little, if any, experience working with macros, this seminar will teach the fundamentals of creating and working with macros in Excel, including
- create a macro in Excel using the Macro Recorder tool
- manage the fundamental elements of macros in Excel, including accessing macro functionality, naming macros, shortcut keys, storing and deleting macros, absolute vs. relative cell references in macros, and macro security
- identify the usefulness of the Macro Recorder and list four key limitations of the Macro Recorder; additionally, modify Excel's Quick Access Toolbar and the Ribbon to provide shortcuts to macros
- list the nine key elements of macros written using Visual Basic for Applications and utilize the Visual Basic Editor; manage macros through copy/paste and delete processes
- create variables in macros and identify the purpose of branching and conditional logic routines such as IF/THEN/ELSE, DO/WHILE, and CASE

Seminar Leader
Marion Williams

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Excel PivotTables
LEVEL Intermediate

Prerequisite
Fundamental knowledge of Excel 2007 or newer.

Special Note
This is a hands-on seminar. Sessions marked "Lab" will take place in a computer lab setting where desktop computers with the current Excel program installed will be provided. Sessions NOT marked "Lab" will require attendees to bring their own laptop with Excel 2007 or higher installed.

Overview
Do you have a worksheet with rows and columns of data and need to figure out what it all means? Among its many functions, a PivotTable can automatically sort; count totals and/or give the average of the data stored in one table or spreadsheet. In this workshop you will discover how Excel's PivotTables can help you turn a collection of data into meaningful information. You will gain valuable hands-on experience in manipulating, analyzing and reporting data using Excel's advanced PivotTable and Charts feature.

Who Should Attend
CPAs, students, accounting and business professionals who want to understand how Excel PivotTables can be used to present their data effectively.

Content
• the theory behind PivotTables and best practices for creating them
• use Excel Formulas to extract and transform data for use in pivot tables
• common errors and tips to avoid them
• apply formulas and calculations in PivotTables to analyze data
• consolidate multiple worksheets or workbooks with PivotTables
• filter, sort and group data within PivotTables
• create interactive Dashboards with Macros, PivotTables and Slicers
• examples of PowerPivot and PowerView, the newest set of tools in Excel

Seminar Leader
Richard Jang, BCom, DipIT, MCP, CPA, CGA

Excel Tables and Data Models:
Efficiently Managing, Analyzing & Reporting Your Data
LEVEL Advanced

Prerequisite
Fundamental knowledge of Microsoft Office Excel.

Special Note
This is NOT a hands-on seminar, but feel free to bring your laptop with Excel 2010 or newer if you wish to follow along. It will focus on Excel for Windows and is not intended for Excel for macOS. It will be taught in Excel 2016, but reference will be made to the differences between Excel 2016 and Excel 2013, 2010, and 2007. This is a paperless seminar – see page 21 for details.

Overview
To efficiently manage, analyze, and report in Excel, you need more than traditional ranges of data – you need tables and data models! Learn about two of Excel's best features which most users know very little of; tables and data models allow you to process large volumes of data into dynamic reports and analytical elements with unsurpassed ease, accuracy, and speed.

Who Should Attend
Professional accountants and other business professionals seeking to manage, analyze, and report more efficiently using Excel.

Content
• key features and advantages working with tables and data models
• creating tables and data models in Excel, including using Power Query to reference data from external data sources into tables and data models
• constructing formulas in tables using Structured References, including formulas that refer to tables in other worksheets and workbooks
• building Data Analysis Expressions in Data Models to extend their usefulness
• using tables as automatic re-sizing data sources for PivotTables and PivotCharts
• using Excel's Power Pivot tools to summarize large data models
• sorting and filter data in tables, including applying slicers
• generating financial reports and data analyses – including PivotTables – which reference information from tables and data models and update dynamically

Seminar Leader to be drawn from
Karen Granville, Hons. BMath
Marion Williams

Seminars:

Excel PivotTables:
- Nov 01 (Lab): UBC Robson, Vancouver
- Nov 27: Victoria Conf Ctr, Victoria
- Nov 29: Ramada Hotel, Kelowna
- Fee $450

Excel Tables and Data Models:
- Nov 02: Sheraton Guildford, Surrey
- Nov 30: Sutton Place, Vancouver
- Feb 28: Sutton Place, Vancouver
- Fee $450

PD Passport Valid 1 Passport Day 7 CPD Hours
Excel Tips, Tricks and Techniques for Accountants
LEVEL Intermediate

Prerequisite
Fundamental knowledge of Microsoft Office Excel 2007 or newer.

Special Note
This is NOT a hands-on seminar, but feel free to bring your laptop with Excel 2010 or newer if you wish to follow along. It will focus on Excel for Windows and is not intended for Excel for macOS. It will be taught in Excel 2016, but reference will be made to the differences between Excel 2016 and Excel 2013, 2010, and 2007. This is a paperless seminar – see page 21 for details.

Overview
This highly acclaimed seminar contains hundreds of tips, tricks, and techniques to improve your productivity and accuracy. It has six major areas of topical coverage: productivity tips and tricks, formatting essentials, customizing Excel, formula-building essentials, three-dimensional workbooks, and printing essentials.

Who Should Attend
Excel users with any level of experience, who have never taken a formal Excel training course for accountants.

Content
- tips and tricks in Excel such as freeze panes, split windows, cells with special characteristics, autocorrect, date and time stamps, the Office clipboard, and paste special; and how to use these to increase productivity in Excel
- tools and techniques for formatting including multiline column headings, accounting, custom date and number, the hidden format, and conditional formatting
- opportunities to customize Excel and procedures for customizing
- formula building tools including absolute vs. relative cell references, formula bar, formula tab, calculations on dates, splitting and combining text strings, text to columns wizard, defined names, conditional calculations, VLOOKUPs and HLOOKUPs
- linking data from multiple Excel workbooks, including creating links, handling broken links, combining single-sheet workbooks, creating sum-through formulas & rolling reports
- printing data from Excel

Seminar Leader to be drawn from
Karen Granville, Hons. BMath
Marion Williams

Financial Model: Merger Modeling
LEVEL Intermediate to Advanced

Prerequisite
Fundamental knowledge of Excel.

Special Note
This is a hands-on course. Please bring a laptop with Excel (any version) installed.

Overview
This hands-on course will focus on the skills required to design and create a powerful model to analyze the impact of a merger or acquisition. The seminar will be taught from the perspective of finance professionals who need to quickly assess the impact of a merger between publicly traded companies. At the end of this seminar, participants will be able to discuss the rationale for merger models; review the various assumptions required to prepare a merger model; calculate the impact of mergers and acquisitions on a buyer’s financial statements; and understand accretion and dilution concepts.

Who Should Attend
Finance professionals and anyone who is required to assess the impacts of potential mergers and acquisitions.

Content
- review M&A considerations
  - discuss rationale for merger models
  - review different approaches
  - discuss various other analyses (i.e. analysis at various prices, contribution analysis, break-even analysis)
- build a merger model
  - review various assumptions
  - identify potential synergies
  - use various forms of consideration in an acquisition
  - calculate the impact of mergers and acquisitions on a buyer's financial statements
  - calculate pro forma ownership positions
  - review and incorporate various checks
  - incorporate powerful Excel tools to sensitize the outputs
  - create summary analysis to synthesize and display important information
  - transform a single merger model into a powerful tool that can quickly analyze the impact of a company making any one of a number of acquisitions
- incorporate accretion/dilution analysis
  - understand accretion and dilution concepts
  - review the limitations of accretion/dilution calculations and incorporate post-transaction analyses to enhance the model’s ability to serve as a decision-making tool

Seminar Leader
The Marquee Group
Financial Model: Mining Financial Modeling
– Understanding and Analyzing a Mining Company
LEVEL Intermediate to Advanced

Prerequisite
Fundamental knowledge of Excel.

Special Note
This is a hands-on course. Please bring a laptop with Excel (any version) installed.

Overview
This course focuses on the skills required to design and create a dynamic financial model of a mining company that is developing an open-pit mine to produce base and precious metals. Issues related to mining, milling and processing will be discussed. The course material includes model design, logic, construction and financial concepts to create a best-in-class financial model of a mining company. Various intermediate Excel tools along with helpful keyboard shortcuts will also be covered throughout the course.

Who Should Attend
Accountants who are interested in enhancing their skills required to design and create financial models of mining companies.

Content
• design and structure a financial model
  - design and layout a financial model clearly and logically
  - discuss the need for a model to serve as a marketing tool
  - create clearly defined inputs and assumptions sections
• build powerful scenarios and financial statements
  - use switches to create effective scenarios and value drivers
  - forecast and build-up the project’s revenues and expenses
  - construct all necessary schedules
  - develop a cash flow projection for the mining company
  - forecast the company’s financial statements
• evaluate the project and the company
  - incorporate a schedule to evaluate the project’s returns
  - build a detailed summary page to display the results
  - use various sensitivity tools to sensitize the project’s returns
  - conditionally format output tables to highlight specified results

Seminar Leader
The Marquee Group

Mar 22 9am-5pm Sutton Place, Vancouver Fee $450 PD Passport Valid 1 Passport Day 7 CPD Hours [C73084A_VA]

Financial Modeling in Excel
LEVEL Intermediate

Prerequisite
Fundamental knowledge of Excel.

Special Note
This is a hands-on seminar. Please bring a laptop with Excel (any version) installed. You will be emailed Excel templates which you will need to load onto your laptop.

Overview
This full-day interactive seminar will enable participants to confidently build a suite of forecast financial statements for a company in Excel using best modeling practice. Participants will learn how to build complex calculations as a number of simple, transparent parts that are easy to audit, perform “what if” scenario analysis recording base case, and other scenarios all in the one model, perform sensitivity analysis to identify the model’s critical assumptions and audit a model’s integrity using Excel’s in-built features and test data.

Who Should Attend
Accountants and other professionals who want to learn how to use Excel to build better financial models.

Content
• structuring a spreadsheet model using best practice
• forecasting – operating income
• key design issues – better formulae
• forecasting – operating assets
• forecasting – financial structure
• modeling debt – circular reference
• key design issues – catering for uncertainty
• forecasting – published cash-flow statement
• auditing a model

Comments from Past Attendees
“Very helpful seminar.” “Very good course - would recommend to anyone looking for a beginner course on building models.” “What I learned during the seminar was very useful and applicable to my daily tasks.”

Seminar Leader
Tim Vipond, MBA

Oct 24 9am-5pm Sutton Place, Vancouver Fee $450 PD Passport Valid 1 Passport Day 7 CPD Hours [C73050B_VA]
Nov 21 9am-5pm Executive Plaza, Coquitlam Fee $450 PD Passport Valid 1 Passport Day 7 CPD Hours [C73050C_CO]
Google is Not Enough: The Best Search Tools You Aren’t Using (But Should!)
LEVEL Introductory

Prerequisite
Participants should know how to access the Internet on their desktop and mobile devices.

Special Note
This is a paperless seminar – see page 21 for details.

Overview
The seminar will provide a concise overview of non-Google search tools and how they can be used by accountants to scan the 99% of the web that Google can’t “see.” You’ll discover a whole new universe of public records, corporate databases, decision engines, people tracking tools, e-marketplaces, user-generated content and much more that are largely off the Google “radar.” Even if you think you’re web savvy, you are guaranteed to learn new search strategies, techniques and tools that will take you to the next level of online intelligence gathering.

Who Should Attend
Accounting professionals who wants to diversify and deepen their online discovery skills, explore Google alternatives and discover online business and accounting information not typically listed in Google search results.

Content
- Google myths and blind spots internet searchers must know
- predictive search
- decision engines
- free business magazine and newsletter subscriptions
- internet archives
- web alerts services
- social media search
- information moshpits
- people search; market, business & accounting research
- eMarketplaces
- events
- invisible web
- verticals
- wikis
- question and answer
- online classifieds
- general search tools

Seminar Leader
Garrett Wasny, MA, CMC, CITP/FITP

Googling for Accountants
(formerly Advanced Googling for Accountants)
LEVEL Introductory

Prerequisite
None

Special Note
This is a paperless seminar – see page 21 for details.

Overview
The seminar provides a concise overview of how accountants can search Google smarter, faster and more effectively. Even if you’ve been Googling many years and think you’re search savvy, you’re guaranteed to learn new online discovery strategies, techniques and tools that will take you to the next level of Internet intelligence gathering. You’ll walk away with hundreds of practical Google lessons that can be immediately applied, deliver instant results and serve you forever in both your professional and personal life.

Who Should Attend
Anyone who uses Google (and who doesn’t?), who wants to search Google effortlessly and efficiently - across topics, time periods, screens and situations - and tap its full online discovery power.

Content
- understand why users underestimate Google’s power
- identify key Google blind spots, biases and vulnerabilities
- customize Google for maximum speed, security and style
- productivity-enhancing apps and plug-ins
- insights, filters and options hiding in plain sight
- little-known hot-words and commands
- use language in Google search strings to boost relevancy
- cross-check Google to verify facts and website credibility
- uncover deeply buried and impossible-to-find information
- Google Translate – gather information in 50+ languages
- search robots that will scan the web for you around the clock
- aggregate your favourite websites into a single dashboard
- manage and share your Google information with one click
- track customer intentions and forecast market trends
- a mobile concierge service and ambient personal assistant
- specialty archives and niche content
- YouTube discovery - unlock business value in online video
- tap Google’s social ecosystem and support networks
- prepare for Google’s big-bang disruptions just ahead
- manage a rich constellation of Google search tools

Seminar Leader
Garrett Wasny, MA, CMC, CITP/FITP
LinkedIn Best Practices for Mid-Level & Senior-Level Finance & Accounting Professionals

LEVEL Intermediate to Advanced

Prerequisite
Basic familiarity with LinkedIn.

Overview
The LinkedIn platform passed the 500-Million member mark in the spring of 2017. It has become the pre-eminent online platform for professional profiles and increasingly, furthering corporate goals. Many professionals, however, have ignored or made-do with a sloppy profile and aren’t leveraging LinkedIn. If you suspect that you’re behind, haven’t paid enough attention or are missing something, it’s time to upgrade your presence and understanding.

This seminar will provide a more strategic perspective on why LinkedIn can be important to your career, your reputation management and the performance of your job. We will cover specific strategies and techniques to upgrade your presence, ways to attract more attention, research, build network and take care of your professional relationships.

Who Should Attend
Finance and accounting professionals, managers, or executives interested in better leveraging LinkedIn for themselves or their business. The seminar is designed with the assumption that you have some familiarity with LinkedIn and likely have a basic profile.

Content
- LinkedIn as a personal marketing and business platform
- what you need to know about managing risk & settings
- define your intention and target outcomes.
- take your profile to the next level: branding forward, voice and copy, extra sections, media, engagement, hacks
- how to represent yourself AND serve your employer
- connection & network strategies: your current and future ecosystems; stakeholder identification; relationship management
- increase return on effort by using LinkedIn as a research tool, audience builder, thought leadership platform, hiring tool and sales tool
- workflows to increase impact for less time

Seminar Leader
Ian Christie

Managing Financial Data With Excel

LEVEL Intermediate to Advanced

Prerequisite
Intermediate knowledge of and capability working with Excel.

Special Note
This hands-on seminar will utilize assignments and handouts throughout the day. Please bring a laptop with Excel (any version) installed.

Overview
This intensive hands-on seminar will transform participants into Excel “power users”. It will focus on the pertinent Excel tools that are required in a corporate environment to efficiently analyze and manipulate financial data, and to create compelling financial analysis.

Who Should Attend
Anyone who uses Excel regularly.

Content
Data Analysis
- built-in functions to interpret and manipulate data
- use Excel’s filters in conjunction with specific arithmetic functions to summarize large volumes of data
- learn to use many features of the Advanced Filter
- incorporate widely used financial and arithmetic functions
- Lookup Functions
- variety of intermediate and advanced Lookup functions
- learn multiple uses of the VLOOKUP and Offset functions, including ways to automate these functions
- nested formulas that expand the flexibility of functions

Managing Text
- use powerful Text functions to manipulate non-numeric variables
- convert non-recognizable values into useable numbers with the use of Text functions

PivotTables
- become proficient with PivotTables to quickly analyze large quantities of data
- learn to use some of the most effective and lesser known PivotTable features
- other tips, tricks, and keyboard shortcuts to increase efficiency

Comments from Past Attendees
"By far and away, this hands-on experience was the most productive and useful course I have taken." “Great seminar. Liked that it was hands-on and very useful material.”

Seminar Leader
The Marquee Group
Modeling Business Cash Flows in Excel

LEVEL Introductory

Prerequisite
None

Special Note
This is a hands-on seminar. Please bring a laptop with Excel (any version) installed. You will be emailed Excel templates which you will need to load onto your laptop.

Overview
This half day “hands-on” workshop explores how to build a robust monthly cash flow forecast model in Excel using modeling best practices. Participants walk away from the workshop with a cash flow model template that can be tailored to their organization.

Who Should Attend
Members in industry or members working with small to mid-sized clients or organizations who are looking at building or improving a weekly or monthly cash flow monitoring model.

Content
• Excel cash flow modeling best practices
• separating cash flow model inputs and outputs
• building flexibility into your cash flow model
• modeling working capital cash flows
• modeling a monthly cash flow statement
• creating a cash flow forecast that can be rolled forward
• undertaking cash flow sensitivity analysis
• the importance of clearly identifying and documenting cash flow assumptions

Seminar Leader
Tim Vipond, MBA

Mar 20
9am-12:30pm
Sutton Place, Vancouver
[72023A_VA]
Fee $220
3.5 CPD Hours

Modeling Project Finance: Real Estate

LEVEL Intermediate

Prerequisite
Fundamental knowledge of, and capability working with Excel.

Special Note
This is a hands-on seminar. Please bring a laptop with Excel (any version) installed. You will be emailed Excel templates which you will need to load onto your laptop.

Overview
Project finance is a growing market with a great deal of activity in both the public and private sectors from real estate to infrastructure (roads, hospitals, alternative energy). This one-day "hands-on" workshop gets participants to model a real estate project’s cash flows from land purchase through development to sale. It also covers modeling various forms of debt and equity.

Who Should Attend
Public practitioners with a client base in the development space or those working in finance/accounting roles for companies or government entities undertaking project-based assignments.

Content
• design and structure of an Excel-based project finance model
• understand how project financing (both debt and equity) flow in and out depending on stage of development
• modeling cash flows for a real estate development project
• building in “triggers” and sensitivities to understand a project’s exposure to key drivers
• building in ownership and financial structures (debt & equity)

Comments from Past Attendees
“Very useful.” “Instructor gave us very useful templates.”

Seminar Leader
Tim Vipond, MBA

Oct 31
9am-5pm
Sutton Place, Vancouver
[73071B_VA]
Fee $450
1 CPD Hours
**Paperless Office**  
**LEVEL** Intermediate  

**Prerequisite**  
Fundamental knowledge of computer operations.

**Special Note**  
This is NOT a hands-on seminar. This is a paperless seminar – see page 21 for details.

**Overview**  
Would you like to find important documents in 10 seconds or less? Of course you would! At the very least, you would like to have secure, reliable access to information more rapidly than you have today while reducing storage space requirements and costs. No one expects a completely “paperless” office, but everyone would like to have much “less paper” to manage! This seminar will use best practice methods and demonstrate proven processes for document management using simple, inexpensive systems costing a few hundred dollars to comprehensive options complete with workflow.

**Who Should Attend**  
Accountants and other business professionals who are accountable for information, including CFOs, Controllers, CEOs, CIOs, and senior managers in general.

**Content**  
- document management, records management, and business process management; calculating the ROI of paperless; identifying the steps to prepare for paperless
- the need for records retention guidelines and policy
- three components of a paperless office – infrastructure, workflow, and people
- key characteristics of electronic file cabinet solutions and document management solutions and typical costs; key vendors of these solutions and their products and services
- key hardware requirements for moving to paperless including scanners, computers, storage, memory, operating systems, and network considerations
- key data backup, disaster recovery, and business continuity issues; key vendors and the solutions they offer

**Comments from Past Attendees**  
"A good seminar. Lots of useful links and tips.” “A good overview of various paperless options.” “Lots of practical examples.”

**Seminar Leader**  
Ward Blatch, CPA, CA

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<td>Feb 20</td>
<td>9am-5pm</td>
<td>Sutton Place, Vancouver</td>
<td>[C73170A_VA]</td>
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<td>Fee $450</td>
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<td>7 CPD Hours</td>
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**Rapid Dashboard Development with Power BI Desktop**  
**LEVEL** Intermediate  

**Prerequisite**  
Basic knowledge of excel. No prior experience with Power BI or Power BI desktop is required.

**Special Note**  
This is a hands-on seminar. Please bring a laptop running the free version of Power BI desktop. As Power BI desktop is updated monthly with new features, we recommend downloading the most recent version available at powerbi.microsoft.com.

**Overview**  
For years, Excel has been the business intelligence tool of choice for accountants and business analysts around the world. In 2015, however, Microsoft released a free software package that has become the hottest software commodity in the business intelligence landscape; Power BI Desktop. Power BI Desktop allows rapid collection and cleaning of data and creates a relational database of the data on the fly. But the best part is that once this work is done it provides access to compelling dashboards that are attractive, interactive and best of all incredibly easy to both build and refresh.

**Who Should Attend**  
Accountants and data professionals who are responsible for building business intelligence reports.

**Content**  
- sourcing data from a variety of sources
- data visualization and transformations
- creating data model relationships
- introduction to DAX measures
- working with interactive visuals
- sharing dashboard solutions personal vs. enterprise

**Seminar Leader**  
Ken Puls, FCPA, FCMA

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<tr>
<td>Oct 25</td>
<td>9am-5pm</td>
<td>Marriott Inner Harbour, Victoria</td>
<td>[C73014B_VI]</td>
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<td>Dec 12</td>
<td>9am-5pm</td>
<td>Van Conv Ctr West, Vancouver</td>
<td>[C73014C_VA]</td>
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<td>PD Passport Valid 1 Passport Day</td>
<td>7 CPD Hours</td>
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</table>
Tech Tools and Gadgets for a More Efficient You
LEVEL Intermediate

Prerequisite
Fundamental knowledge of computer operations.

Special Note
This is NOT a hands-on seminar, but feel free to bring your laptop with Office 2010 or newer if you wish to follow along. It will focus on Office for Windows and is not intended for Office for macOS. It will be taught in Excel 2016, but reference will be made to the differences between Excel 2016 and Excel 2013, 2010, and 2007. This is a paperless seminar – see page 21 for details.

Overview
Technology, and specifically the ever-evolving world of tools and gadgets, continues to awe and amaze and “The Internet of Things” is rapidly turning this evolution into a revolution. In this seminar, you will learn how to take advantage of the many features in tools that you likely already own – such as Microsoft Windows and Microsoft Office – to become more productive. You will also learn about numerous cloud-based applications and services, and you will witness demonstrations of leading tools, gadgets, and apps – many of which won't cost you anything – designed to make you more efficient, effective, and productive.

Who Should Attend
Business professionals seeking to leverage technology for improved personal and team productivity.

Content
The focus of this seminar is providing a clear understanding of where “Tools & Gadgets” should fit into your technology plans. Specific topics include
• identifying opportunities to implement free and inexpensive solutions to solve common business issues, including security
• recognizing opportunities to use the cloud as the backbone of a business technology infrastructure
• implementing smartphone and tablet apps to connect to, and more efficiently manage, information
• hidden features in applications you already own
• troubleshooting and maintaining your computer with free and inexpensive tools

Seminar Leader
Ward Blatch, CPA, CA

Technology Update
(formerly Technology Update for Accountants – Don’t Get Left Behind)
LEVEL Intermediate

Prerequisite
Fundamental understanding of basic technology concepts.

Special Note
This is NOT a hands-on seminar. This is a paperless seminar – see page 21 for details.

Overview
Are you ready to learn about the latest trends in technology? Do you sometimes feel lost in the technology jungle? Would you like clear guidance regarding Windows, Office, the Cloud, security, and other technology-related issues? If you answered “yes” to any of these questions, then make plans now to invest ½ a day in this fast-paced and highly informative seminar that is sure to ramp up your return on technology investment. The technology tools available to businesses have never been better, but many are not taking full advantage of these tools. This course helps professionals, at all levels, understand the major trends in hardware, software, and services and how to utilize these tools to meet organizational objectives both efficiently and effectively. More than just a seminar on the latest computers, you will learn about the full spectrum of practical technology available to you and your team and how to implement these tools for maximum impact.

Who Should Attend
Business professionals who are interested in how technology affects them and seek an update of relevant technology trends, tools, and techniques.

Content
• key features of Windows 10 and situations where upgrading might be advantageous
• developments in mobile technologies and developing an optimal mobile strategy
• security issues facing business professionals and options for mitigating risk
• key features of Office 2016 and determining an optimal time to upgrade
• major trends in hardware, including desktops, laptops, servers, tablets, storage, and printing
• strategies for successful Cloud implementations, including accounting and tax, document management, workflow, and data storage and synchronization applications
• virtualization and how it potentially changes the technology infrastructure in your office

Seminar Leader
Ward Blatch, CPA, CA
People Management & Personal Development

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Becoming a Skilled Negotiator
LEVEL Introductory

Prerequisite
None

Overview
A key skill for accountants to succeed in business today is the ability to effectively negotiate with internal and external parties. The basis for successful business relationships has long been the product of negotiation rather than power. To achieve personal business objectives, it is necessary to be able to win support from colleagues and clients and to negotiate effective outcomes. The goal of this interactive course is to enable finance professionals to reach mutually agreeable business solutions by thinking and acting for the long term success of negotiated outcomes, and developing communication strategies and other skills that support successful outcomes.

Who Should Attend
Individuals responsible for negotiating with internal clients and external parties, and taking the perspective of establishing and maintaining successful long-term relationships.

Content
In this session you will learn
• best practices on effective commercial negotiations including the benefits of a win-win approach
• methods for dealing with a partner who is not seeking a win-win outcome
• how to establish outcomes including understanding options and appreciating different interests at hand
• preparations for negotiations including the identification of stakeholders and their respective interests
• about the role of values in negotiation
• successful behaviours in support of negotiations
• how to handle manipulation, and manage the personal agendas that can jeopardize successful negotiation

Comments from Past Attendees
“I liked the practical approach of the course.” “Excellent! This was the best PD course I’ve done so far.”

Seminar Leader to be drawn from
Scott Powell, CPA, CA
Helen Wale, MA, CPHR, CEC

Oct 25 9am-5pm Sheraton Guildford, Surrey
Nov 10 9am-5pm Victoria Conf Ctr, Victoria
Nov 22 9am-5pm Coast Capri, Kelowna
Nov 27 9am-5pm Hyatt Regency, Vancouver
Fee $450 PD Passport Valid 1 Passport Day

Clear Thinking/Clear Speaking
LEVEL Introductory to Intermediate

Prerequisite
None

Overview
In this course you will learn to speak clearly and succinctly, in a way that helps your listeners stay focused and value your remarks, even when you have little or no time to prepare. This course will help you learn to respond to questions, speak up at meetings and even feel more comfortable in social situations. While speaking is the primary focus, you will also gain tips to help with tasks like phone messaging, email, and report writing.

Who Should Attend
Individuals at any phase in their career wishing to enhance their communication skills, especially their ease in speaking, and confidence in different (and possibly challenging) situations.

Content
This is a day filled with exercises and activities related to impromptu speaking. You’ll be on your feet talking to small groups and offering other speakers your honest feedback. While some theory is presented, this course is focused on practical application.

In this session, you will learn to
• tune in to the real feelings and concerns of your audience
• connect your responses to their interests, needs and concerns
• organize your comments
• use timing to increase the impact of your message
• manage difficult and awkward questions - yet sustain and build goodwill
• stay calm under fire - how to manage audience hostility
• incorporate examples to win their attention at an emotional level
• practice for continual improvement
• never again have to think, “I wish I’d said ...”

Comments from Past Attendees
“One of the best courses I have taken.” “Great opportunity to practice speaking in front of others.” “This was a fantastic course. I gained so many new tools and I’m looking forward to putting them into practice!”

Seminar Leader
Margaret Hope, M.ED.

Nov 16 9am-5pm Marriott Inner Harbour, Victoria
Dec 12 9am-5pm Van Conv Ctr West, Vancouver
Mar 06 9am-5pm Sutton Place, Vancouver
Fee $450 PD Passport Valid 1 Passport Day

7 CPD Hours
Communicating Effectively Under Pressure
LEVEL General

Prerequisite
None

Overview
We have all felt pressured, at one time or another, to respond to a difficult question, opinion, or suggestion. It may be that we require more time to reflect about what is being asked, or we struggle with the question of “should I say what I really think?” Or maybe we are unsure of what we think or what we want.

In this course, we will explore situations where you feel pressure and learn some practical strategies for communicating under pressure.

Who Should Attend
Anyone who has ever felt pressured to respond and struggled with it.

Content
• exploring circumstances where pressure occurs
• managing the conflict within
• saying no
• understanding own style
• understanding stress response
• speaking for own needs
• common pitfalls
• tips and tools for communicating under pressure

Seminar Leader
Pam Penner

Oct 20 9am-5pm Marriott Inner Harbour, Victoria [M73219A_VI]
Oct 27 9am-5pm Sheraton Guildford, Surrey [M73219B_SU]
Nov 09 9am-5pm Four Seasons, Vancouver [M73219C_VA]
Dec 15 9am-5pm Van Conv Ctr West, Vancouver [M73219D_VA]
Fee $450 PD Passport Valid 1 Passport Day 7 CPD Hours

Communicating with Influence
LEVEL General

Prerequisite
None

Overview
One of the crucial keys to success for any professional is being able to communicate ideas and knowledge to all the stakeholders in the organization. This means communicating complex ideas in a fashion that allows everyone – boards, audit committees, line managers, sales people and service staff – to understand what you need to support the overall success of the organization. Communication that is effective, as well as efficient, instills confidence, demonstrates leadership and creates trust in your knowledge and experience. If you’ve ever been caught in the communication circle of “that’s not what I said – that’s not what I meant”, then you need new skills to clearly and effectively get your message across. This course will support your success as a leader and manager by teaching you how to communicate with influence.

Who Should Attend
Individuals who need to share expertise internally and externally, wanting to improve how they share that knowledge while improve relationships with all stakeholders.

Content
In this session, you will learn
• the basics of communication and how people relate to a message
• to communicate with intention and focus
• how to listen to the other people involved in a conversation
• to identify and incorporate language for effective communication
• about asking open-ended questions
• how tone of voice communicates more than words
• generational communication strategies for communicating with Millennials
• tools for improving daily communication that are easily to incorporate
• how to deliver complex ideas to a non-technical audience in an efficient and effective manner

Comments from Past Attendees
“Great seminar, instructor was delightful and a pleasure to learn from.”
“Very practical point raised, great models, passionate instructor which made the seminar much more enjoyable.”

Seminar Leader
Sharon Edwards

Oct 23 9am-5pm Coast Capri, Kelowna [M73370B KE]
Nov 10 9am-5pm Victoria Conf Ctr, Victoria [M73370C_VI]
Nov 14 9am-5pm Sutton Place, Vancouver [M73370D VA]
Nov 15 9am-5pm Sheraton Guildford, Surrey [M73370E_SU]
Feb 19 9am-5pm Sutton Place, Vancouver [M73370F VA]
Fee $450 PD Passport Valid 1 Passport Day 7 CPD Hours
**Conflict: Changing Viewpoints & Influencing Behaviors**  
**LEVEL Introductory to Intermediate**

**Prerequisite**  
None

**Overview**  
Too often our well-intentioned efforts to change the views and behaviours of others leads to escalating emotions and debilitating conflict. And this mismanaged conflict impairs performance and destroys relationships. To enhance the quality of your relationships with people who count, you need to acquire the insights and skills for turning disagreement and disputes into opportunities for cooperation. This course will provide those insights, and participants will receive a free copy of the instructor's best-selling book, *The Game of Life: Turning Conflict into Cooperation*

**Who Should Attend**  
Anyone who must deal with conflict (from trivial disagreements to visceral, hostile disputes) or wrestle with insensitive or frustrating "difficult people" and emotional blackmailers on a regular basis.

**Content**  
In the course, you will learn about
- developing conflict consciousness: strategic choices; causes and barriers; dimensions and functions; assessing your normal conflict management style; essential distinctions
- the psychology of conflict: the law of conflict; perceptual barriers; interaction cycles; mechanisms of self-control; conflict escalation and resolution; critical principles
- intelligent confrontation: dealing with disagreement; changing unintentional and problem behaviours; delivering criticism that others can actually take to heart
- influencing difficult people: understanding pathological behaviour; strategies for dealing with bullies, know-it-alls, indecisives, pessimists, silent-unresponsive and others
- prevention tactics: achieving rapport by design; building trust; alignment; dealing with objections; saying "no" without being disagreeable; choosing your battles; hot and cool buttons

**Seminar Leader**  
Dr. Jim Murray

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**Sharpening Your Business Writing Skills**  
**LEVEL General**

**Prerequisite**  
None

**Overview**  
Good writing skills are essential for business success today; are yours holding you back? This course will dramatically improve your writing skills by showing you how to communicate faster and more effectively using plain English. You'll gain valuable insights into your writing style and the rules of grammar, punctuation, and usage.

**Who Should Attend**  
Individuals wishing to improve their business basic writing skills, or sharpen their advanced skills.

**Content**  
In this session you will learn
- what constitutes good business writing, and how writing style issues affect your message.
- why so many good writers are striving for simple English
- how to use the fog index, which measures the minimum grade-school reading level required to read your writing easily
- how reading for work differs from reading for pleasure
- ways to define your purpose and objectives in writing
- to identify what you need to know about your audience
- how to prepare a detailed outline that you can use as a road map
- about writing simple, concise sentences
- the power of verbs and in choosing short powerful words
- organizing information appropriately
- the role of rewriting and editing in honing your message
- the reviewing of rules of grammar, punctuation, and usage

**Comments from Past Attendees**  
"Most informative and enjoyable seminar." "Right mixture of lecture and hands-on practice. Very enjoyable course." "The materials presented were great and the exercises were helpful in teaching important points." "Great technical and practical information which can be applied to a business environment."

**Seminar Leader**  
Duncan Kent, BA, MA

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PD Passport Valid 1 Passport Day 7 CPD Hours
The Art of Negotiating...with anyone
(formerly The Art of Negotiating...with anyone Parts 1 & 2)
LEVEL Intermediate to Advanced

Prerequisite
None

Overview
The one skill you need to succeed is the ability to get other people to agree with you. In any undertaking of significance, whether personal or business related, knowing how to get others to accept your point of view while seeing themselves as winners is crucial to your freedom, happiness and prosperity. Indeed, you will never ascend the corporate ladder without a sound grasp of negotiating principles.

This comprehensive two-day course is the creation of Jim Murray, who has been researching, teaching and practicing this time-honored craft for almost five decades. And he has been regularly teaching this course for us since 1982. He has been publicly regaled as a “negotiator’s negotiator”, been nationally honoured at the university level for his effectiveness in the classroom, and has authored three best-selling books on negotiating, one of which you will receive as an attendee – The Optimal Negotiator: A Companion for Serious Deal Makers.

Who Should Attend
Individuals seeking to accomplish their objectives through the willing (though sometimes unwitting) cooperation of others. This course sells out early – don’t miss your opportunity.

Content
• the framework for winning (every time) – what negotiators really want; getting and protecting information; tactic recognition and response, recognizing and relating to different negotiating styles
• the process simplified: how to prepare, open, identify the critical signals and overcome resistance; how to apply leverage; timing; when to say no; how to increase and decrease power advantages
• human behaviour: how to make people do what you want them to do; engineering a climate conducive to achieving objectives
• essential communication skills: Phrasing to induce perceptions; the language of hidden meanings; non-verbals; lie detection
• strategy and tactics: How to design a winning strategy and change the shape of the deal; the skills of optimal negotiators

Comments from Past Attendees
“Changed my entire perspective on negotiating.” “Made the process less intimidating.” “This course will pay for itself next week.” “Wish I’d taken this 30 years ago.” “Savvy insights and real stories told me how to get whatever I want.” “Taught me more about negotiating in two days than I learned in three years at law school.”

Seminar Leader
Dr. Jim Murray
Mar 27-28 9am-5pm Sutton Place, Vancouver Fee $875 [M74040A_VA] 14 CPD Hours

Tools for Communicating with Difficult People
LEVEL General

Prerequisite
None

Overview
This course explores the reasons we find certain individuals and situations difficult to deal with. Is it because a person is emotional, resistant, or behaving badly? What are our reactions to a difficult person or situation, and what are the reasons we react the way we do? Are our reactions productive? What can we do differently to ensure a productive conversation that enables change in a way that is respectful and inclusive?

This course will help you deal with the reactions of others and to self-manage your own. It will provide you with techniques for assertively, respectfully and accurately describing behaviours you find difficult, and for requesting a change. It will help you prepare for, and to conduct, difficult conversations.

Who Should Attend
Anyone who would like to, or needs to, address problematic behaviour inside or outside of the workplace.

Content
• defining and exploring behaviour
• dealing with resistance and minimization
• defusing emotion
• anger arousal and impact on cognitive functioning
• self-management tools
• communication skills
• limit setting and disengaging
• exploring assumptions - intention - effect

Seminar Leader
Pam Penner
Dec 08 9am-5pm Hyatt Regency, Vancouver Fee $450 PD Passport Valid 1 Passport Day 7 CPD Hours [M73652A_VA]
When it Hits the Fan: A Primer in Crisis Communications Management
LEVEL Introductory to Intermediate

Prerequisite
None

Overview
You come into work on Monday morning to find your organization's computer system has been hacked and sensitive client information compromised. OR it's Friday afternoon and social media breaks the news of massive fraud at one of your major clients. What do you do when 'it hits the fan'? Increasingly, the challenges of modern business are being carried out in the public eye and your organization has to be ready to take up the challenge when the unthinkable happens. A good reputation is priceless and built over a long time; one misstep can destroy it – and your business – in a split second.

This seminar will provide you with the tools to meet a crisis head-on, assess the situation and take the right steps to manage it publicly, ethically and sensibly. Using a format of case studies, group discussion and role-playing, you will have the opportunity to practice under pressure for the time when it really 'hits the fan.'

Who Should Attend
CPAs in both public practice and industry (for-profit and non-profit) interested in gaining or strengthening their crisis management skills.

Content
• learn how to establish and maintain an issues management program to identify problems before they become crises
• the 10 essential steps to prepare your organization to manage crises
• the 12-step program for managing crises
• the 7 needless sins of crisis mismanagement
• how to create and prepare your crisis team
• how to train your organization's spokesperson
• how to recognize and manage the ethical considerations embedded in most crises
• practice your crisis management skills through case study discussion and role-playing

Seminar Leader
Deborah Folka, APR, FCPRS, LM

Nov 22
1:30pm-5pm
Van Conv Otr West, Vancouver
(M7261A_VA)

Fee $220
PD Passport Valid
1/2 Passport Day
3.5 CPD Hour

A Coach Approach to Problem Solving
LEVEL Intermediate to Advanced

Prerequisite
None

Overview
Conflict management may not be considered a core competency in many organizations, but it should! Each day we interact with clients, managers, service providers, employees and peers. Our effectiveness is determined by our ability to negotiate and collaborate with others. Problem-solving and managing conflict in this process seems to be an essential ingredient.

So why are some leaders more effective at conflict management than others? They use a Coach Approach! Coaching uses inquiry skills to help people be more aware of their emotions, thinking and behaviours. Coaching is a way of structuring a conversation in a way that helps others take responsibility for their feelings and behaviours, consider other meaningful possibilities, strengthen important relationships and rebuild trust. Effective conflict and resolution results require a coaching and mediation approach.

Who Should Attend
Anyone wanting to improve their ability to embrace typical challenges and conflict in the workplace.

Content
In this session, you will learn how to
• design a “problem solving coaching” conversation
• identify the positive opportunities that conflict creates
• address workplace conflict more confidently
• understand a powerful “constructive feedback” model

Comments from Past Attendees
“Great energy, passion and enthusiasm.” “Great instructor. Engaging, high energy, relevant topics.” “Hands-on coaching topics. Not just another leadership course, but actual coaching.”

Seminar Leader
Lesley-Ann Marriott, CEC, PCC

Dec 01
9am-5pm
Sutton Place, Vancouver
(M73600A_VA)

Fee $450
PD Passport Valid
1 Passport Day
7 CPD Hours
Project Management: Tips & Traps
LEVEL Intermediate

Prerequisite
None

Overview
The objective of this seminar is to organize a project for success in a realistic and effective manner.

Participants will gain the skills and knowledge to:
• understand the value of project management for your organization
• organize projects effectively
• identify practical problems confronting a project
• learn PM best practices and what works for you

Who Should Attend
Senior managers seeking a greater understanding of project management, identifying improvement.

Content
Project Management (PM) is fundamental to an organization’s success; essentially, it is the organization of resources to meet time-specific outcomes. We will provide an overview of PM, explain why a company should use it, and describe who should use it. Then we will run through the necessary steps to implement a project management approach. We will address the components of a good plan: how to organize for success; identifying potential barriers; and, studying PM best practices and how to use them. In the wrap-up, we will include some advice on practical problems associated with PM.

Comments from Past Attendees
“Practical information on project management.” “Great teaching and communication ability.” “Good overview of subject.”

Seminar Leader
Bruce Acton, FCMC, MBA

Nov 21
9am-5pm
Van Conv Ctr West, Vancouver
[MT73460A_VA]
Fee $450
PD Passport Valid
1 Passport Day
7 CPD Hours

The Essentials of Project Management
LEVEL Introductory

Prerequisite
None

Overview
Organizations often undertake a wide variety of projects which have important implications for their overall growth and success. Supported by dedicated project managers, project team members have a critical contribution to making sure that project success while maintaining their day-to-day responsibilities. Understanding the key elements of the project management process helps everyone to contribute most effectively.

This workshop equips participants with tools and techniques to enable them to be effective project team members and to play their part in ensuring their projects achieve success.

Who Should Attend
Members in industry and practitioners who want to better understand the tools and techniques to enable them to be effective project team members and ensure projects achieve success.

Content
In this session, you will learn how to:
• identify the critical elements that ensure projects are managed effectively.
• understand the major stages of a project, and the key characteristics of each stage.
• play a strong part in the success of projects on which they are involved at work.
• have a tool kit of techniques to be used when working on a project team.

Seminar Leader
Chris Wyman, CPA, CMA, CIA, CRMA

Mar 14
9am-5pm
Sutton Place, Vancouver
[MT73114A_VA]
Fee $450
PD Passport Valid
1 Passport Day
7 CPD Hours
Thinking Beyond the Box
LEVEL Intermediate to Advanced

Prerequisite
None

Overview
Thinking differently and more effectively is the key to success in everything you do, whether discovering hidden possibilities, dealing with risk, conceiving novel concepts or solving complicated problems. Creative thinking is neither a gift nor a consequence of magical inspiration; it’s a learnable skill. Unfortunately, it’s a skill you never acquired in school – you might have been taught how to learn but you were not taught how to think.

Each of us has a mental model of how we think the world works – it determines what we pay attention to and how we solve problems. If our model is rigid, if we only think on one cylinder, we make decisions in the same way with the same results. If, on the other hand, you’ve built a toolbox of approaches for filtering your experiences and choose the best tool for the job, you become far more effective as a decision maker. To achieve this proficiency, you must cross train your brain to make it more flexible and adaptable. Smart leaders have the biggest toolboxes and don’t rely on antiquated problem solving techniques.

Who Should Attend
We work in an age that demands smart leaders – those who “make things happen” rather than hope they might happen. Accountants, in particular, tend to peer into the future through the lens of rational thought. Yet the future can’t be forecasted through spreadsheets or projecting what we already know. Analytical thinking – the search for one right answer – is no longer sufficient, much less adequate. This two-day course may change your life. We all have the potential – is no longer sufficient, much less adequate.

Content
• Principles for thinking differently: Getting beyond small-cage habits and cognitive biases; How our brains work (and don’t)
• Overcoming the barriers that prevent us from solving problems: The power of intuitive thought and how to harness it
• Essential principles: How to sell your ideas; Individual and group techniques for liberating ideas; Applying the tools at work
• Personal liberation and transformation: Will your brain keep up?

Comments from Past Attendees
“Forced me to understand who I am.” “A framework for solving tough problems when I hit the wall.” “Providing the fuel to re-direct my self-confidence in a more productive manner.”

Seminar Leader
Dr. Jim Murray

Oct 25-26 9am-5pm Sutton Place, Vancouver (M74980A_VA)
Fee $875 PD Passport Valid 2 Passport Days 14 CPD Hours

Business Ethics - It Starts With You
LEVEL Introductory

Prerequisite
None

Overview & Who Should Attend
This course will offer an introduction to managing ethical issues in a business setting. It will explore the intersection amongst prominent theoretical approaches to ethics, personal values, business values and how they shape business decisions. We will consider human conduct in a business setting based on these approaches. The seminar will benefit individuals and leaders wishing to understand, reflect, and manage ethical issues in a business setting.

Content
• Foster an ethical mindset - explore contextual issues in business ethics and the ability to think critically and ethically within them
• Identify your “ethical standard” and how to communicate this standard in support of business decisions - how you manage a series of ethical dilemmas and develop conclusions
• Develop communication strategies in support of ethical actions - examine formal and informal communication tools
• Examine your understanding of key concepts and terms in business ethics - the impact on ethics and business decision making at all levels of an organization
• Reflect on ethical issues in a business context

Ethics Content
This course contains 4 hours of ethics content.

Seminar Leader
Dr. Shawn Ireland, M.Sc., MA, E.Dd

Oct 17 8:30am-12:30pm Sutton Place, Vancouver (E72030H_VA)
Oct 17 1pm-5pm Sutton Place, Vancouver (E72030L_VA)
Oct 19 8:30am-12:30pm Van Island Conf Ctr, Nanaimo (E72030J_NA)
Oct 19 1pm-5pm Van Island Conf Ctr, Nanaimo (E72030K_NA)
Oct 25 8:30am-12:30pm Coast Capri, Kelowna (E72030L_KE)
Oct 25 1pm-5pm Coast Capri, Kelowna (E72030K_KE)
Nov 09 8:30am-12:30pm Coast Hotel, Kamloops (E72030H_KA)
Nov 09 1pm-5pm Coast Hotel, Kamloops (E72030L_KA)
Nov 16 8:30am-12:30pm PG Civic Ctr, Prince George (E72030Q_PG)
Nov 16 1pm-5pm PG Civic Ctr, Prince George (E72030L_PG)
Nov 28 8:30am-12:30pm Four Seasons, Vancouver (E72030R_VA)
Nov 28 1pm-5pm Four Seasons, Vancouver (E72030S_VA)
Nov 30 8:30am-12:30pm Victoria Conf Ctr, Victoria (E72030T_VI)
Nov 30 1pm-5pm Victoria Conf Ctr, Victoria (E72030U_VI)
Dec 05 8:30am-12:30pm Executive Plaza, Coquitlam (E72030V_CO)
Dec 05 1pm-5pm Executive Plaza, Coquitlam (E72030W_CO)
Feb 07 8:30am-12:30pm Executive Airport, Richmond (E72031A_RB)
Feb 07 1pm-5pm Executive Airport, Richmond (E72031B_RB)
Feb 20 8:30am-12:30pm Quality Hotel, Abbotsford (E72031C_AB)
Feb 20 1pm-5pm Quality Hotel, Abbotsford (E72031D_AB)
Mar 22 8:30am-12:30pm Sutton Place, Vancouver (E72031E_VA)
Mar 22 1pm-5pm Sutton Place, Vancouver (E72031F_VA)
Fee $220 PD Passport Valid 1/2 Passport Day 4 CPD Hours
Corporate Governance and Ethics
LEVEL Introductory

Prerequisite
None

Overview
This course will develop and enhance the understanding of corporate governance and ethics, and how these can be evaluated. It will provide participants with the knowledge and skills they need to understand the role and responsibilities of management in the context of corporate governance and ethics and management's responsibilities to the board.

Who Should Attend
This course will be of benefit to financial or other executive leaders who interact with and provide support to their board. It will also be of interest to audit committee and other board members who want an understanding of their role and responsibilities surrounding corporate governance and ethics.

Content
In this course, you will learn
- what corporate governance is the essential elements of a corporate governance system
- an overview of legislative requirements surrounding governance
- the governance value proposition
- the control environment
- the role of the audit committee and board of directors and the importance of self-evaluation
- the role of management in promoting 'tone at the top'
- information technology governance
- the definition of IT governance
- an overview of the COBIT and ITIL frameworks
- the essential elements of an IT governance framework
- ethics and values
- an overview of general business ethics
- understanding the subset of ethics within an organization
- the use of codes of conduct and ethics policies
- tools for evaluating the ethical culture of an organization

Ethics Content
This course contains 3 hours of ethics content.

Comments from Past Attendees
"It was really good, and the instructor was excellent." "Practical value, good examples, good ideas to take back to the office."

Seminar Leader
Chris Wyman, CPA, CMA, CIA, CRMA

Ethical Principles and the Accounting Profession: CPABC Code Decoded
LEVEL General

Prerequisite
None

Overview & Content
This course focuses on evaluating current and emerging professional ethical requirements and how they impact decision-making in business while serving employers, clients and the public. The course is designed for CPAs who would like a deeper evaluation of the Code. This course builds on your competence in interpreting and applying the CPABC Code of Professional Conduct, and centres on active participation. The course begins with a refresher of the Code, then examines in depth a few areas of the Code that are relevant in a wide variety of contexts and can pose challenges requiring significant judgment. Collaborative group activities allow you to explore possible actions and outcomes and to recognize linkages between key ethical requirements. Note: please bring a current copy of the CPA Code of Professional Conduct (hardcopy or electronic).

Ethics Content
This course contains 4 hours of ethics content.

Seminar Leaders
Please refer to our website for list of seminar leaders.

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Please go to our website at pd.bccpa.ca for additional dates beyond December 2017.

Fee $450  
PD Passport Valid  
1 Passport Day  
1 CPD Hours
Gateway to Membership: Welcome to the Pros
(formerly The Essence of Professionalism: Ethics, Rules and Standards for New CPA, CGAs)
LEVEL Intermediate

Prerequisite
Recent completion of the requirements for membership under the CGA legacy program.

Overview
This seminar helps new CPA, CGAs in their transition from student to CPA, CGA member. The session focuses on ensuring that new members understand and accept their responsibilities as CPA, CGAs, while also recognizing the opportunities, resources and support available to them as members of a strong professional community.

Who Should Attend
This course is designed specifically for, and applicable only to, new CPA, CGAs, to fulfill the legacy requirement to complete the full-day ethics course by the end of their first CPD reporting year.

Content
Topics covered will include
- the governance structure and regulatory framework of CPABC
- privileges and obligations of membership including CPD requirements
- protecting the public
- interpreting and applying the CPA Code of Professional Conduct
- volunteerism within the profession
- resources within the professional community, including the roles and functions within CPABC’s member services and PD teams

Seminar Leader
Laura Friedrich, MSc, FCPA, FCGA

Professional Presence
LEVEL General

Prerequisite
None

Overview
What makes some of us successful, while others with the same skill level are left behind? Improve your professional presence, enhance your personal profile and as a result, your business relationships. In today’s world we need to make a good first impression quickly; through email, voice and face-to-face. This practical, interactive one-day course will provide you with valuable skills to increase your effectiveness and your confidence in any situation.

Who Should Attend
Anyone wanting to build better business relationships.

Content
In this session, you will learn how to
- demonstrate proper business etiquette
- create a dynamic and lasting first impression
- master the “invisible” impression you send through electronic correspondence and voice mail
- use a “personal tagline” to construct a memorable introduction - ensuring the right people don’t forget you
- master small talk and networking
- practice social savvy business entertaining
- manage effective non-verbal communication
- display “professional presence” in difficult situations

Comments from Past Attendees
“Rhonda is an excellent facilitator. Her positive, energetic nature makes the experience so much more helpful.” “Everything learned in this course can be applied to the workplace as well as everyday life.” “Very interactive. Great presenter. Enjoyable day.” “Rhonda made the course very comfortable and informative.”

Seminar Leader
Rhonda Caldwell
Shades of Grey - Ethics in the Workplace  
LEVEL Intermediate

Prerequisite
None

Overview
This course aims to develop and enhance the participants' understanding and application of business and professional ethics. Throughout the session, numerous case studies and ethical dilemmas are used to encourage discussion and explore moral philosophy in the workplace.

Who Should Attend
Professional accountants who have decision-making and reporting responsibilities within their organizations.

Content
In this course, you will learn
• the core of ethics, including the professional codes and sources of ethical guidance
• how ethics impacts the culture and environment of an organization
• professional conduct, including independence, objectivity and dealing with conflicts of interest
• ethical decision-making, including exercising professional skepticism and using ethical frameworks to assist in the process
• confidentiality and acts considered discreditable to the profession

Ethics Content
This course contains 4 hours of ethics content.

Comments from Past Attendees
"The speaker was engaging with fun case studies." "Kept my interest throughout – presentation method and style were excellent." "A job well done! Really enjoyed this PD course." "Very interesting delivery of the topic." "Entertaining, relevant, practical."

Seminar Leader
Chris Wyman, CPA, CMA, CIA, CRMA

Understanding and Embracing Ethics in the Workplace  
LEVEL Intermediate

Prerequisite
None

Overview
"I believe…. therefore I do…." Research shows that despite our best intentions and conviction to our values, our actions in times of conflict or stress may not be what we expect.

This session provides an opportunity to challenge and uncover what "ethics" means in a professional context and how our goals, values and traits drive our responses in times of conflict and stress. Participants will have opportunities to practically apply what they learn through interaction and knowledge exchange with their peers.

Who Should Attend
CPAs and other business professionals seeking to better understand the challenges of ethics in the workplace and how best to prepare and manage responses to ethical challenges.

Content
In this course, you will learn
• how to manage organizational dynamics when personal ethics conflict with corporate values
• various approaches to ethical thinking
• the impact stress and conflict has on our thoughts and actions
• how we can best prepare to work in this environment
• the impact of deadline and goals/objectives in driving ethical performance
• ethics from a broad organizational perspective as it relates to Corporate Social Responsibility (CSR)
• to apply and practice specific techniques, tools and strategies based on relevant business based scenarios

Ethics Content
This course contains 4 hours of ethics content.

Seminar Leader
Tammy Towill, FCPA, FCMA
Balancing Your Wheels
LEVEL General

Prerequisite
None

Special Note
To get the most out of this seminar, please bring your calendar or day-timer with you.

Who Should Attend
Individuals who may feel that their calendar is too full, and getting in the way of living the life they want.

Overview
No matter where your life path leads there will always be bumps in the road. Job interference with personal and family time is a significant source of stress that creates these bumps. Over 48% of Canadians have reported that their stress has increased significantly in the last few years. Learning to navigate through this uneven terrain requires new tools.

In this session, we will explore some of the following questions…
Do you feel that you have the power to overcome this overwhelming challenge? Are you living your life according to your personal priorities? Are you able to tend to your personal relationships? To your personal health and well-being? If not, how is this impacting your life? What are the costs? To you? Your team? And your career?

Who Should Attend
Individuals who may feel that their calendar is too full, and getting in the way of living the life they want.

Content
In this session, you will learn
• how to re-draft your life according to your personal and professional priorities.
• the Four Circles – how the 4 key domains of life intersect and support our lifestyles
• self-assessment, and determine how balanced you currently are
• how to develop a personal ‘whole life’ vision
• key optimizers that will help you manage your resiliency and energy

Comments from Past Attendees
"The seminar provided us with some great tools and valuable key learnings to apply in our lives." "The course materials were personally focused but also used the benefits of group discussions." "Fantastic.

Seminar Leader
Lesley-Ann Marriott, CEC, PCC

Becoming a High Performance Team Member
LEVEL Introductory to Intermediate

Prerequisite
None

Overview
This course is designed to provide a high degree of awareness about what it takes to play a constructive role as a member of a high-performing team. Special emphasis will be placed on interpersonal skills that team members need, for example, advocacy, listening, and conflict resolution.

This course is based on Patrick Lencioni’s 5-step framework that includes the practices of building trust, resolving conflict, developing commitment, holding team members accountable, and achieving results. Other aspects such as the stages of team development, and participation in team meetings are also explored.

Who Should Attend
Anyone seeking to take their own teamwork skills to the next level.

Content
In this session, you will learn
• the five dysfunctions of a team
• how to adapt to social styles, including how to adapt your own style when participating in teams
• the art of building trust
• active listening
• conflict resolution and the positive role of team conflict
• how to help hold teammates accountable
• meeting participation
• the role that managers need to play in team development

Self-awareness and skills development will be focused on through an interactive business simulation that will expose typical challenges faced by teams.

Comments from Past Attendees
"I loved the instructor – great facilitation of the class, and enjoyed all activities participated.” “I really enjoyed this seminar especially the presenter who kept us engaged and provided us with tips we could use at work.” “It provided me with tools I felt I did not have before.”

Seminar Leader
Nic Tsangarakis

Nov 21 9am-5pm  Van Conv Ctr West, Vancouver [M73213A_VA] Fee $450 PD Passport Valid 7 CPD Hours
Brain Focus: The Power of Full Engagement

LEVEL General

Prerequisite
None

Overview
The way we’re working isn’t working. The success you achieve in life depends on the knowledge you possess. But today, with vast amounts of information pouring in every minute from hundreds of sources, acquiring the knowledge you need has become a major challenge. This course gives you clear and practical ideas to help you learn anything better, easier, faster, and will help you master the skills of absorbing, retaining and using knowledge more effectively.

This course is packed with tips, stories, ideas, and strategies, to help your brain and information management skills.

Who Should Attend
Anyone who wants to improve productivity, regain focus, and work smarter all day long.

Content
In this session, you will learn how to
• overcome limiting beliefs that block your ability to learn and to succeed
• set up a ‘brain friendly’ environment that supports learning and work
• reduce stress from information overload
• read faster and remember more
• think more creatively
• eat with your brain in mind
• learn the #1 skill that experts agree is the most crucial to your success

Comments from Past Attendees
"The speaker was very entertaining while being equally informative." "This speaker was fantastic! He knew what he was talking about and definitely had an impact."

Seminar Leader
Terry Small, B.Ed., MA

| Oct 25 | 9am-12:30pm | Sutton Place, Vancouver | M72190A VA |
| Nov 08 | 9am-12:30pm | Quality Hotel, Abbotsford | M72190B AB |
| Nov 21 | 9am-12:30pm | Coast Capri, Kelowna | M72190C KE |
| Fee $220 | PD Passport Valid | 1/2 Passport Day | 3.5 CPD Hours |

Business English for Professionals

LEVEL Introductory

Prerequisite
None

Overview
The competence level of a business professional is often judged by their ability to communicate in English; this course recognizes and addresses the language challenges faced by many non-native English speaking professionals. The primary objective is to help attendees improve their English communication skills for use in both business and social settings, and increase their confidence when expressing themselves and communicating with professional peers. This interactive course will introduce fundamental communication tools and provide opportunities for practice in realistic business meeting role-play situations.

Who Should Attend
Individuals whose first language is not English wishing to communicate more efficiently and confidently.

Content
In this session, you will learn
• the skills and techniques required for effective communication in a business meeting environment
  - introducing and welcoming participants, reviewing past business, beginning the meeting, discussing agenda items, concluding the meeting
• appropriate and useful phrases, consideration of Canadian culture and manners
  - agreeing and disagreeing politely, providing or asking for an opinion, asking for clarification, suggesting, group dynamics in the workplace, non-verbal communication and signals, cultural values and understanding

Comments from Past Attendees
"The presentation is relevant to my work. It gave me an idea of which areas I need to work on. It was very helpful!" "It was helpful and informative." "Overall this was a very good course."

Seminar Leader
Louis Chang, CPA, CA

| Nov 23 | 9am-5pm | Van Conv Ctr West, Vancouver | M73003C VA |
| Dec 14 | 9am-5pm | Van Conv Ctr West, Vancouver | M73003D VA |
| Fee $450 | PD Passport Valid | 1 Passport Day | 7 CPD Hours |
Coach Yourself First
LEVEL: General

Prerequisite
None

Overview
Why is it that some managers and leaders inspire people to be the best they can be and others don’t? What do they possess that fosters inspiration for people to become valuable assets in their organizations? The answer is simple – they coach from a position of authenticity and personal connection. In this course, you will gain a deeper understanding of your personal coaching style and its impact on others. You will discover the power of personal passion, engagement and purpose to manage yourself, and coach others to be effective coaches, in your organization.

Who Should Attend
Managers and leaders wishing to strengthen their personal coaching skills, self-awareness, and effectiveness in connecting wholeheartedly and authentically.

Content
In this session, you will learn how to
• identify your personal coaching strengths, values, preferences, and ways of working
• assess your coaching identity
• develop a clear personal vision and goals for coaching
• use emotional intelligence theory, the theory of emotional regulation, and their applications
• analyze your own reactions, judgments, emotions, and thought processes that support and hinder authenticity in coaching

Self-assessments, exercises, and skills practice, will be used to develop a better understanding of yourself and the challenges of authenticity as a coach.

Comments from Past Attendees
“Good speaker, interesting and fun, useful information.” “It was phenomenal and will be of tremendous value to me both personally and professionally.” “The facilitator was perfect – totally knew the material and was able to present it very well.”

Seminar Leader
Dr. Shawn Ireland, M.SC., MA, E.Dd

Creative Thinking for Accountants
LEVEL: Introductory to Intermediate

Prerequisite
None

Overview
Too often accounting teams are viewed as impediments to opportunities or creative expansion (always the "Black Hat"). It is our belief that this stems from a lack of cooperative information sharing between departments, “siloing” inside organizations, and a tradition of destructive analysis. The purpose of this course is to assist accounting professionals and their team members in becoming more involved in strategic planning, creative financial assessments, and building a toolbox that permits personal and corporate growth.

Participants are encouraged to complete self-assessments to target areas of strength and areas for creative development. Group goals include expanded strategic planning and interpersonal skills. Participants will focus on methods to increase financial assessments beyond a spreadsheet or traditional accounting ratios.

Who Should Attend
Individuals and managers who work with and influence external and/or internal clients/stakeholders and wish to increase their ability to function in multi-disciplinary meeting environments.

Content
In this session, you will
• discover your creative thinking style
• understand the climate conducive to fostering creativity
• generate ideas using various creative-thinking techniques for accountants
• learn how to limit the role “Black Hats” play in creative processes
• learn how to build a toolkit for managing and encouraging creativity in accounting teams
• learn how to build creative thinking into individual and team accounting processes

Seminar Leader
Christopher Moreno, CPA, CMA

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Critical Thinking and Self Reflection
LEVEL Intermediate

Prerequisite
None

Overview
Successful leaders and managers have one thing in common – they learn by doing and by applying their experience to day-to-day activities. At the core of their learning style is a continuous examination of the taken-for-granted assumptions that form their approach to decision-making and relationships. This one-day course identifies the link between learning styles, critical thinking and self-reflection in our working and personal lives and how to use these to enhance personal effectiveness.

Who Should Attend
Leaders and managers who want to develop their critical thinking skills to enhance their personal effectiveness.

Content
In this session, you will
• examine the stages in the transformation process in adult development
• explore the “Window on Yourself” - values, beliefs, perceptions
• identify and diagnose your learning style, and your own ways of thinking and working
• get introduced to critical thinking tools and techniques
• about self-motivation and keeping a positive bias
• to challenge assumptions through critical self-reflection
• identify of thinking styles and their role in critical thinking
• action plan, including the use of interpersonal and self-assessment tools to reintegrate new perspectives

Comments from Past Attendees
“Extraordinarily excellent.” “Very good seminar leader. Keeps you entertained and provides relevant examples which make this very complex material easier to grasp.” “Was very good in keeping my attention with examples, stories, activities, and discussions.”

Seminar Leader
Dr. Shawn Ireland, M.SC., MA, E.Dd

Influence and Assertiveness
LEVEL Intermediate

Prerequisite
None

Overview
Well-developed influencing skills and assertiveness are key competencies for managers in their day to day activities. This highly interactive course provides tools and techniques for enhancing the impact of power and influence and assertiveness with decision-makers and peers.

Who Should Attend
Individuals wishing to increase their influence and assertiveness, improve relationship building, and increase their impact within their organization.

Content
In this session, you will learn
• three methods of influence
• sources of power and influence
• phases of influence
• how to conduct a quick influence test
• the bases of influence and conditions of their use
• to establish and use credibility, reciprocity and persuasion in different situations
• what is assertive, aggressive and passive behaviour
• assertive communication
• a “Bill of Assertive Rights”
• what is assertiveness inventory
• the assertive invitation and techniques
• personal influence auditing – what are your own power and influence preferences
• action planning for the future

Comments from Past Attendees
“The tools introduced will be useful for reference and were clearly presented.” “I enjoyed the balance of concepts and exercises.” “The discussions were interesting and the exercises were very helpful.” “A very good instructor.”

Seminar Leader
Dr. Shawn Ireland, M.SC., MA, E.Dd
Maximizing Marketability for Mid-Level & Senior Level Finance & Accounting Professionals
LEVEL Intermediate to Advanced

Prerequisite
None

Overview
Too often, career management is relegated to "dusting off the resume" every few years and a mad scramble when things go wrong. There's a proactive, strategic approach to career growth that you can adopt to achieve more market power, greater opportunity flow and more degrees of freedom around your career path.

This seminar will expand your understanding of the drivers to a strong professional journey and give you insights and tools to incorporate into your professional plan. The seminar will include both content and exercises designed to help you better understand your offering and how you can maximize your marketability.

Who Should Attend
Industry executives and managers, and public practice managers and above who ready to adopt a more proactive and intentional approach to the development of their career.

Content
• what is it and why does it matter? what are the big goals?
• your market power: understand and influence
• the essential connection between effective personal marketing and being presented with the right set of opportunities
• get clear on and leverage your professional assets
• align future work decisions/career moves with natural target markets and direction/goals
• ignore branding at your peril - your career narrative/war stories/low hanging fruit and upgrades
• get smart about intentional networking and your key professional relationships
• understand reputation management and how to influence
• opportunity channels, and the importance of profile, reach, presence and getting noticed before you need to make a move

Seminar Leader
Ian Christie

Dec 14 9am-12:30pm Van Conv Ctr West, Vancouver [M72011A_VA]
Fee $220 PD Passport Valid 1/2 Passport Day 3.5 CPD Hours

Personal Effectiveness: Self Awareness and Balanced Thinking
LEVEL General

Prerequisite
None

Overview
Successful people have one thing in common – they learn by doing and by applying their experience to day to day activities. Through understanding themselves, their values and motivators, and by continuously examining their taken-for-granted assumptions, they are able to adapt and improve their communication and management styles, their approach to decision-making and relationships. This one-day highly interactive course identifies the links between our self-understanding, personal growth, communication and management styles, and critical thinking, both in our working and personal lives.

Who Should Attend
Individuals wishing to enhance personal awareness to enhance their personal effectiveness.

Content
In this session, you will learn
• about self-understanding and personal growth: the "Window on Ourselves", including assessing our preferred ways of thinking and working
• self-motivation, self-image and self-appraisal
• to challenge assumptions through critical self-reflection
• communication and management styles
• how to link your thinking and emotions to develop your own emotional intelligence
• to foster appreciative inquiry
• to capture knowledge and be introduced to "deep smarts" techniques
• to action plan with the use of interpersonal and self-assessment tools to implement fresh perspectives

Comments from Past Attendees
"This was a productive day and the content worthwhile." "The group discussions were really good. The instructor did a great job of facilitating the group's conversation." "Excellent instructor."

Seminar Leader
Dr. Shawn Ireland, M.SC., MA, E.Dd

Nov 08 9am-5pm Coast Hotel, Kamloops [M73002B_KA]
Dec 07 9am-5pm Sutton Place, Vancouver [M73000C_VA]
Fee $450 PD Passport Valid 1 Passport Day 7 CPD Hours
Resiliency and Grit:
You Have What it Takes to Bounce Back from Adversity and Challenge

LEVEL General

Prerequisite
None

Overview
The key to resiliency – the ability to adapt to life’s changes and crises – is key to a healthy productive life. Knowing when to press on, and when to let go, being able to feel secure and confident when the answers are unclear and the future uncertain, is a new imperative. The science of resiliency demonstrates why some people are more resilient than others and how it can be learned at any age. Through stories, exercises and examples you will learn how to apply the thinking and take action that leads to greater ease, confidence and effective outcomes in your life and career. You will leave with actionable insights and valuable tools to take back control and feel armed to effectively handle the realities of today’s worried and frenetic world.

Who Should Attend
Anyone who wants to improve their knowledge on inspiration, resilience, and true grit for themselves and for their team.

Content
In this session, you will learn
• what is true grit, resilience and confidence?
• specific attributes of a resilient and confident leader
• your impact matters … be relentlessly positive about the stories you tell and the conversations you have
• how to make meaning of the mess and stay positively engaged
• encourage openness and curiosity
• move swiftly from resignation and resentment to acceptance and positive action
• the role of calmness, presence, radical acceptance, curiosity and empathy in resilience for peace of mind
• strengthen your self-esteem and confidence
• how to have courageous conversations about grit and resilience
• guidelines for positive robust team energy … stop negativity and cynicism in the moment
• build a daily blueprint for personal and team success
• face the real challenge: how can your team commit and hold one another accountable to resilience?

Seminar Leader
Tammy Robertson, MA

Time Management:
The Essentials of Productivity Skills

LEVEL General

Prerequisite
None

Overview
The "time management” challenges of the 21st Century workplace are very different - old solutions don't work anymore! This leading edge course will provide you a new mind-set and skill-set that will optimize your personal productivity learning to produce greater results in less time. Participants will learn how to gain and keep control of competing priorities, concurrent projects and critical deadlines. The focus on practicality means that people walk out with techniques they can apply the next day.

Who Should Attend
Individuals who feel time-challenged, or feel that they don’t have enough time in their days.

Content
In this session, you will learn
• the 4 vital productivity principles that top performing executives understand and apply every day
• how to implement workload reduction strategies by identifying and cutting time wasting activities
• the truth about “wasting time”… and how to minimize it
• to stay on track - limit other people taking control of your day
• to create “to-do lists” that really work, overcoming frustration
• to set and manage multiple and constantly shifting priorities
• 3 critical organizational tools essential to create a highly efficient workspace
• multi-tasking - when is it OK or counter-productive
• 4 core components of creating an airtight system
• 12 proven techniques for minimizing interruptions
• how to say NO without feeling guilty
• how to attempt to tame the monster - tips and techniques
• 8 essential techniques to overcome procrastination
• strategies and tactics for creating productive meetings

Comments from Past Attendees
“Very effective presenter – fast paced. Took away lots of practical info.”
“Great presentation style, enthusiastic, knowledgeable and engaged.”
“Practical tips. Very thought provoking.”

Seminar Leader
Greg Campeau, B.Comm.

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Nov 15
9am-5pm
Sutton Place, Vancouver
(MT3041A VA)
Fee $450
PD Passport Valid 1 Passport Day 7 CPD Hours

Dec 11
9am-5pm
Marriott Inner Harbour, Victoria
(MT3330B VI)
Fee $450
PD Passport Valid 1 Passport Day 7 CPD Hours

Dec 14
9am-5pm
Van Conv Ctr West, Vancouver
(MT3330C VA)
Fee $450
PD Passport Valid 1 Passport Day 7 CPD Hours
Triple Your Reading Speed
LEVEL General

Prerequisite
None

Overview
Do you have enough time to read? Are you tired of feeling info-whelmed? Too many emails? Have you ever finished a page and asked yourself, “What did I just read?” Chances are, you are reading far below your capabilities. Using the latest discoveries about the brain and learning, Terry has trained over 230,000 people to boost their reading power, and move ahead at school or on the job! In addition, vocabulary enrichment will be stressed. Whether you are a student, business person, or a recreational reader... you can quickly, easily, and dramatically improve speed and comprehension!

Who Should Attend
Individuals wishing to start reading faster today, including those who consider themselves to be a hopelessly ‘slow reader’.

Content
In this session, you will learn
• how to get the most powerful reading tool ever invented
• to quickly increase your reading speed
• the #1 secret of comprehension (it’s not what you think)
• how to save a lot of time
• memory enhancing techniques
• the real reason reading is so good for your brain
• to improve your vocabulary
• motivational tips, plus advice on goal-setting and time management
• your decisions on what to read, and what not to read
• how to understand confusing, or poorly written material

Seminar Leader
Terry Small, B.Ed., MA

Oct 24 9am-5pm Four Seasons, Vancouver [M73004E_VA]
Nov 20 9am-5pm Coast Capri, Kelowna [M73004D KE]
Feb 15 9am-5pm Marriott Inner Harbour, Victoria [M73004F VI]
Fee $450 PD Passport Valid 1 Passport Day 7 CPD Hours

What is Your Happiness Practice?
It’s Time to Ditch the Stress and Find Real Happiness
LEVEL General

Prerequisite
None

Overview
The happiness model is broken. The good news is the new model is better. Recent discoveries in the field of positive psychology have shown that the commonly held idea that success brings happiness is actually backward: Happiness fuels success not the other way around. So, if your mood needs some elevating, this course outlines the simplest formula for a happy life. Believe it or not, you can still get to your “Happy Place.”

This course is a comprehensive buffet of practical ideas, suggestions and tools to guide you to a more content, grateful and appreciative way of living. And it will show you how to get more of the satisfaction you are craving.

Who Should Attend
Anyone wishing to assess and increase their happiness level.

Content
In this session, you will learn about
• the brain on happiness … the science of why feeling good leads to success
• the dream we all have that is completely wrong
• how enthusiasm saves lives: know what makes you happy
• assessing and measuring your happiness
• the myths of happiness … how to want nothing, do anything and have everything
• questions to help you shift perspective and feel better
• words that matter: change the way you tell your story
• ten ways to be more grateful
• the power of relationships: easy ways to amp up connection and appreciation
• 15 ways to become a positive force
• how to overcome the joy crushers (deal with negative people)
• the surprise of lists … a joy list, first time list and a bucket list
• three keys to a happy day (contentment, calmness and connection)
• feeding off the energy of laughter: say yes, and look for the fun!
• living above the line: hold yourself accountable to being happy

Seminar Leader
Tammy Robertson, MA

Nov 16 9am-5pm Four Seasons, Vancouver [M73116A VA]
Fee $450 PD Passport Valid 1 Passport Day 7 CPD Hours
Best Practices for Leadership & Talent Management
LEVEL: Advanced

Prerequisite
None

Overview
At the end of the day, your success as a leader and the long term success of your organization will depend on the quality of your talent. This hands-on, action planning course will help leaders take their talent management practices up to the next level. The course includes dozens of best practices, tools, and worksheets for developing and managing talent.

Who Should Attend
Leaders, specifically those who manage other leaders, have responsibility for organizational talent, and/or make decisions about investing in talent development.

Content
This course will present practices that are both strategic and tactical, and also help you begin planning how and when to use them. Topics include:
• crafting a leadership development strategy for your team or business unit
• aligning leadership development with your organization’s vision and strategy
• multiplying the value of your courses and stretching your training budget
• assessing the value and ROI of leadership development initiatives
• what to ask of and expect from your HR team and external consultants
• how to apply world class, big company, best practices on your team
• the importance of building a culture of leadership
• introduction to several state of the art practices including action learning, the apprenticeship model, leadership transitions, the leadership pipeline, and various cutting edge leadership models and approaches

Comments from Past Attendees
"Fantastic speaker that provided excellent examples…was engaging and innovative in what he presented.” “Very practical and engaging.” “Joel was extremely knowledgeable and helpful. He is an excellent teacher and communicator.”

Seminar Leader
Joel Shapiro, Ph.D.

Bridging the Generational Divide
LEVEL: Intermediate

Prerequisite
None

Overview
Never before have we had such diversity in the workplace in terms of different generations that have completely different expectations, abilities and behaviours. Baby Boomers and Generation X are completely perplexed by the ‘attitudes’ the Millennials bring to the office. Millennials just want to work for an organization that appreciates their skills and gives them a meaningful purpose. Oh, and right around the corner is Generation Z, and they have a whole new set of rules that they want leaders to pay attention to!

In this fun, engaging and enlightening session we will take you through how to understand what each generation brings to the table and how, as a leader, you can engage the hearts and minds of your entire four-generation team. We’ll also explore if harmony at work is possible and if employee loyalty is dead.

Who Should Attend
Leaders wanting to understand how to get the most in terms of engagement, cultural harmony, customer satisfaction and results from their entire team.

Content
In this session, you will learn:
• key differences in the generations that make up your workforce
• the unique skills that each generation brings to the table as a result of the environment they were nurtured in
• how to identify your leadership response for each individual on your team for maximum engagement
• how to build an ‘Epic Culture’ through values and purpose alignment

Comments from Past Attendees
"Excellent instructor – engaging and interesting, relevant topic." “Real life experiences and insight.” “Very worthwhile.”

Seminar Leader
Robert Murray

Nov 29 9am-12:30pm Sutton Place, Vancouver [M72326A VA]
Fee $220 PD Passport Valid 1/2 Passport Day 3.5 CPD Hours
Building High Performance Teams  
LEVEL Introductory to Intermediate  

Prerequisite  
None  

Overview  
Focused, engaged and highly committed employees represent your biggest expense but the greatest opportunity for achieving sustainable competitive advantage. Yet research clearly tells us that today’s workforce is inefficient, disengaged, stressed out, feeling apathetic, distrustful, tuned-out and entitled. If these symptoms don’t characterize your workplace, you’re either lucky, complacent or just not paying attention.  

Learn how to nurture greater productivity, motivate employees to accomplish more in less time, encourage two-way feedback, become stress free, and generally excite your workforce, especially those who will ultimately determine your fate.  

Who Should Attend  
Anyone who wants to know the ingredients needed to build great teams and how most managers cause low performance.  

Content  
In the session, you will learn about  
• today’s workplace: myths, realities and changing perceptions  
• basic tenets and enablers for building great teams  
• key questions you must answer to encourage performance  
• diagnosing and measuring team effectiveness and agility  
• principles of engagement: how to “turn on” your workers  
• do performance incentives retain and motivate employees?  
• building trust: the fuel that drives innovative entities  
• the critical art of giving and soliciting two-way feedback  
• the value and design of employee surveys and exit interviews  
• performance reviews: problem or opportunity (and how to fix)  
• efficiency: ideas and tools for accomplishing more in less time  
• the productivity gap: the difference between effort and results  
• dealing with annoying co-worker behavior: getting work done  
• becoming stress and dispute-free: the process and the tool  
• motivating and reconciling the needs of different generations  
• achieving alignment: getting everyone “on the same page”  
• dealing with toxic employees: rehabilitate or terminate  
• getting people to work smart rather than burn-out hard  
• the art of delegation (in all directions): benefits and warnings  
• the critical role of managers in a high performance workplace  

Seminar Leader  
Dr. Jim Murray  

Mar 29  
9am-5pm  
Sutton Place, Vancouver  
Fee $475  
PD Passport Valid  
1 Passport Day  
7 CPD Hours  

Develop a Culture of Excellence  
LEVEL Intermediate to Advanced  

Prerequisite  
None  

Overview  
This course will provide a deep understanding into the psychology behind a culture of excellence. Developing a culture of excellence is about learning to identify a culture, recognizing its strengths and weaknesses, and how to influence and bring about change in that culture. This knowledge can be applied internally within your own organization, or externally when engaging with clients and their organizational culture.  

Who Should Attend  
Professional accountants, CFOs and Controllers who would like to develop their ability to influence the culture in their organizations.  

Content  
In the course, you will learn about  
• basic psychology and how it affects organizational culture  
• how individuals, teams and larger groups create cultures and sub-cultures  
• identifying a culture using visual and verbal signs  
• the strengths and weaknesses inherent in each culture, and how the dominant culture affects the performance of the organization  
• what a culture of excellence looks like  
• recognize and influence formal and informal power structures in the culture  
• develop strategies for influencing the culture  
• understand risks, benefits and challenges through culture change  
• goal setting and implementing the learning in your own organization  

Comments from Past Attendees  
"One of the most enjoyable PD courses I have ever taken." "Great framework. Russell managed expectations very well." "Practical, good handouts."  

Seminar Leader  
Russell Cullingworth, MBA  

Dec 11  
9am-5pm  
Van Conv Ctr West, Vancouver  
Fee $450  
PD Passport Valid  
1 Passport Day  
7 CPD Hours
Empowering and Engaging Others
LEVEL Intermediate

Prerequisite
None

Overview
In the current economic climate, and with the growing expectations of increasingly demanding employees, developing the competencies of leaders and managers is key to improving individual, organizational and business performance. This highly interactive course provides leaders and managers with the tools and techniques, confidence and practice, to become highly effective managers.

Who Should Attend
Leaders and managers who want the tools and confidence to become more effective in their positions.

Content
In this session, you will learn
• the challenges and benefits of delivering superior performance
• styles of management and leadership and their impact on working relationships
• how to empower and engage employees through a coaching style of management and leadership
• the qualities and skills of an effective manager: values, beliefs, assumptions, biases; building rapport and trust; effective listening and questioning; critical thinking; feedback
• tools and techniques to support engagement in diverse situations
• effective action planning

Comments from Past Attendees
“Very applicable both in workplace and home.” “Excellent session and presenter.” “Enjoyable and informative.”

Seminar Leader
Dr. Shawn Ireland, M.Sc., MA, Ed.D

Fee $450
9am-5pm Sutton Place, Vancouver [M73640B VA]
PD Passport Valid 1 Passport Day 7 CPD Hours

Enhancing Your Leadership Impact
LEVEL Introductory to Intermediate

Prerequisite
None

Overview
In their quest to be effective leaders, managers often try to emulate other leaders who have had an impact on them. While this can be helpful, discovering your own style leads to a more authentic engagement with others in the workplace and builds on your strengths to maximize your impact.

This highly interactive and engaging course will help you identify and enhance your leadership impact through completion of the Myers-Briggs Type Indicator (MBTI). Participants will receive an 18 page customized report on which to base the exploration and identification of how they can enhance their leadership impact, while remaining true to themselves and their own style.

Who Should Attend
Professionals currently in a management position or moving into one that involves leading and supervising others.

Content
This course utilizes instructor presentation, reflection, small and large group discussion, video clips, and experiential activities to explore the following topics
• characteristics of authentic leaders
• interpretation of the MBTI – identify where you direct your energy, how you take in information and how you make decisions
• apply the MBTI insights to communication and leadership style, enabling you to leverage your strengths and influence others

Comments from Past Attendees
“Excellent examples/exercises and very insightful.” “Balance of lecturing and activities. Effective clips and examples tying in with written material.” “Very effective and well-spoken.” “This was a very insightful seminar and Tammy kept it at just the right pace and depth to keep the class engaging and fun.”

Seminar Leader
Tammy Dewar, Ph.D.

Fee $450
9am-5pm Sutton Place, Vancouver [M73840A VA]
9am-5pm Sheraton Guildford, Surrey [M73840B SU]
PD Passport Valid 1 Passport Day 7 CPD Hours
Facilitation Skills
LEVEL Introductory to Intermediate

Prerequisite
None

Overview
How one runs meetings is highly correlated to how they are perceived as a leader. People who run great meetings are able to deliver far better decision-making for the organization, and are generally more productive with their own time, and the time of others. Unfortunately, the reality is that many organizations suffer from poorly-planned and led meetings, resulting in widespread frustration, difficulty in making decisions, and even burnout as employees struggle to gain control over their time.

This course will provide the skills and tools to enable participants to facilitate more productive meetings and achieve greater outcomes. Participants will then apply these tools by running simulated meetings during the day.

Who Should Attend
Anyone who runs meetings, or engages in group decision-making on a regular basis.

Content
In this session, you will learn to
• facilitate improved group decision-making
• provide direction and movement during meetings that make greater use of time
• achieve improved involvement and reduced stress
• facilitate more successful meetings with larger groups
• run meetings that achieve stated objectives
• determine the right decision-making approach
• deal with people who dominate or do not participate enough
• how to best use visual aids during meetings
• what to do after the meeting

Seminar Leader
Nic Tsangarakis

How to Achieve Your Company Vision Through Effective Performance Review
LEVEL Intermediate

Prerequisite
None

Overview
Performance appraisals serve many vital functions in an organization, but are not an end in themselves. Used to its maximum benefit, the performance appraisal is the means by which everyone in the organization understands, and is held accountable for, meeting a truly important objective – accomplishing the corporate vision. Many formal appraisal systems, if an organization even has one, provide little or no link to the corporate vision of the company. This course will show you how you can take your performance appraisal form in one hand, your company vision in the other, and tightly link the two together to achieve your corporate strategy.

Who Should Attend
Leaders at any level who have responsibility for managing the performance of others.

Content
In the session, you will learn
• the 6 important questions to ask when determining your Mission and Vision
• how companies like Amazon, Zappos, Starbucks and Nordstrom use core values to manage performance
• how to create a simple, clear job description by focusing on key outcomes for the role
• how to embed your organizations’ strategic priorities into your performance management system
• specific tools that you can add to your management tool-box
• a vital and vigorous four-phase Performance Management System that links the individual’s performance with the organization’s vision
• how to help employees design weekly action priorities aligned with your organization’s vision, mission, and values
• team survey to “temperature-check” your employee’s connection to your current corporate vision
• examples of exceptional visions and core values – a template for your organization

Comments from Past Attendees
“Very practical take-aways to implement back in the office.”

Seminar Leader
Lesley-Ann Marriott, CEC, PCC
Implementing Change: How to Anticipate and Avoid Costly Problems
LEVEL: Advanced

Prerequisite: None

Overview:
Have you ever encountered this situation? You have been given the responsibility to implement an important change within your organization. Despite careful planning, excellent communication and sustained effort on your part, implementation becomes stalled by unanticipated problems. You are not alone! Approximately 70% of organizational change initiatives fail. The good news is there is a way of anticipating and avoiding the most common change implementation problems so that change goals can be met on time and within budget. This fast-paced, practical course will provide you with the tools and techniques needed to earn the reputation for being a leader who gets needed changes accomplished.

Who Should Attend:
Change drivers and leaders of organizational change initiatives, or those wanting to develop leadership skills and implement change effectively.

Content:
In this session, you will learn:
• the real cost of failing to implement change effectively
• problems that inhibit successful change implementation
• how to analyze quickly a proposed change before you implement it, and anticipate and avoid 'downstream' problems
• the major components of an organizational system, and how to use a 'systems approach' to making change happen
• the implications wheel tool: what it is and how to use it to dramatically increase successful change implementation
• through case studies and real-life stories

Participants will receive a comprehensive workbook, and have access to post training session support.

Comments from Past Attendees:
“Robert was a fantastic speaker. The presentation and workshop was very engaging.” “Rob was great, and we worked through some real life examples.”

Seminar Leader:
Rob Gilfoyle

Influencing Without Authority
LEVEL: Introductory to Intermediate

Prerequisite: None

Overview:
The acid test of a good plan is the willingness of others to implement it. A key skill relevant to leaders at all levels is the ability to positively influence people in such a way that others willingly alter their thoughts and plans. An individual's level of influence can be dramatically improved by carefully adjusting ideas to the concerns and communication styles of others, and by formulating ideas in a compelling way. As influencing skills are used more often, resistance to change decreases along with the need to use authority or positional power, leading to stronger relationships and increased commitment.

This course will provide participants with the knowledge, skills, and processes required to influence others in getting things done.

Who Should Attend:
Individuals at any level within organizations, including senior leaders, who are interested in improving their level of influence without relying on positional power.

Content:
In this session, you will learn how to:
• improve the odds of getting good ideas adopted
• better influence peers and superiors
• reduce resistance to change
• influence with reduced reliance on authority or positional power and increase your credibility with others
• build stronger relationships
• achieve increased commitment to new ideas by appealing to both logic and emotion

Comments from Past Attendees:
“One of the best seminars I have attended over the past 18-19 years.” “Excellent seminar!” “An outstanding instructor – knowledgeable, personable and engaging.” “Nic was fantastic. He really knew the material, engaged the attendees and had a fun vibe to the day.”

Seminar Leader:
Nic Tsangarakis

Nov 28 9am-5pm Sutton Place, Vancouver [M7325A_VA]
Fee $450 PD Passport Valid 1 Passport Day 7 CPD Hours
Leadership and Coaching
LEVEL Intermediate

Prerequisite
None

Overview
The climate that leaders create in their working environment is a key factor in the performance of their teams, and ultimately the results of their organization. This course focuses on equipping participants with the knowledge and skills to become effective and respected leaders, able to turn compliance into commitment to achieve the desired results for their business unit, teams and themselves in a more effective manner.

Who Should Attend
Leaders and managers wishing to enhance their leadership skills and achieve improved performance.

Content
In this session, you will learn
• the process of strategic leadership and the leadership triangle
• inspirational leadership
• leadership for change: shared core values
• coaching for growth
• coaching and mentoring for performance improvement – maximizing individual competencies and enabling others to fulfill their potential
• action planning

Comments from Past Attendees
“This was the best course I have attended, the speaker was very knowledgeable and based the day on his experiences as well as the class’ desired outcomes.” “Very engaging!”

Seminar Leader
Dr. Shawn Ireland, M.Sc., MA, E.Dd

Making Change Stick:
Apply Science-Based Methods to Improve Human Performance
LEVEL Introductory to Intermediate

Prerequisite
None

Overview
After nearly dying from heart problems, Michael Eisner, the former CEO of The Walt Disney Company, vowed to ‘let go’ of some of his duties. He brought in Michael Ovitz, co-founder of the mighty Creative Artists Agency, as second in command. But Eisner – with his very life on the line – failed to ‘let go’ and see the idea through. He struggled to do what he publically committed to do. This phenomenon is all too common. Despite knowing what to do, and declaring we want to do it, we fail to do it. Science now reveals the reasons: old habits, a fixed mindset, and our unconscious mind co-conspire to make us immune to change. This workshop provides the opportunity to apply the science-based approach developed at Harvard University credited as having ‘cracked the code’ on this immunity to change phenomena.

Who Should Attend
Anyone wanting to create a breakthrough in their own performance. High achievers disappointed with conventional training as a means for genuine development and growth. Participants should come prepared to work on an improvement goal and are encouraged to bring any and all documents such as any existing personal assessment reports, corporate learning plans, or performance reviews.

Content
• habits & automaticity: why we keep doing what we do in life and business, even when we want to stop
• how individual habits – along with collective mindsets in our organizations – combine to create a natural but powerful immunity to change
• insights from neuroscience and neuroplasticity into what it takes to make change stick
• a step-wise process to diagnose, pinpoint and uproot our own immunity to change
• a personalized 7 week plan designed to kick start the change you want to make

Seminar Leader
Alex Wray

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Comments from Past Attendees
"This was the best course I have attended, the speaker was very knowledgeable and based the day on his experiences as well as the class’ desired outcomes.” “Very engaging!”
Managing Change and Transformation
LEVEL Intermediate

Prerequisite
None

Overview
We live and work in a continually changing environment, which provides challenges and opportunities for our organizations. This course will focus on understanding and responding to the process of business change and transformation. It will demonstrate how participants can champion change efforts, and manage the change and transformation process through leadership, perseverance, risk-taking, and the enrolment of others.

Who Should Attend
Leaders and managers wishing to better handle change and transformation, and understand how to implement change more successfully.

Content
In this session, you will learn
• what is change
• various forms of individual and organizational change
• how to become a change leader
• how to communicate change and develop strategies for implementation
• how to manage the danger – denial and resistance
• how to manage the opportunity – exploration and commitment
• effective action behavior

Comments from Past Attendees
"Excellent! Engaging, knowledgeable and entertaining instructor." “Instructor does a great job of facilitating/creating conversation and drawing on experiences from people in the room.” "Really good day."

Seminar Leader
Dr. Shawn Ireland, M.Sc., M.A, E.Dd

Managing My People
LEVEL Introductory

Prerequisite
None

Overview
This interactive course will focus on helping managers get the most out of their people. Increasingly, managers are recognizing that their people provide the only true and sustainable way to differentiate their business offering and serve clients most effectively. The challenge is to maximize the contribution that people make to improve the success of that business. This course will equip managers with effective ways of working with their teams, in order to get the best out of each team member.

Who Should Attend
New and experienced leaders who are seeking to hone their management skills to drive enhanced performance of their teams.

Content
In this session, you will learn
• the characteristics and benefits of effective management – people as our competitive advantage
• the nature and purpose of management interventions
• how to build an effective management style
• how to assess what your team members need from you
• matching your management styles to development levels of staff
• how to inspire and motivate your colleagues
• about giving effective feedback
• the power of authenticity
• how to coach for development and improved capability

Comments from Past Attendees
"High level of group activity and interaction. Made the day a more practical learning experience." “Engaging, and had a good mix of discussion and instruction.”

Seminar Leader to be drawn from
Scott Powell, CPA, CA
Helen Wale, MA, CPHR, CEC

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Systems Thinking and Resolving Complex Issues in Complex Environments
LEVEL Advanced

Prerequisite
None

Overview
In an increasingly complex world, we continue to try to apply reductionist thinking to resolve systemic problems. In a reality characterized by interconnectedness and interdependency, this approach is no longer adequate. This course is designed to enhance participants’ understanding and awareness of systems theory and present tools and strategies to effectively address systemic issues in organizations.

In this course, participants will learn to recognize complexities in organizational systems and to identify points of leverage to bring about positive change. Specific models will be presented and explored to develop a level of familiarity with the discipline of systems thinking.

Who Should Attend
Those in decision-making positions, whether at the top of the organizational hierarchy or in the middle, who could benefit from an enhanced ability to address complex issues. As this course focuses on effective leadership practices, it is relevant to anyone in any position involving organizational leadership at any level.

Content
In this session, you will learn
• an overview of organizational systems theory and complexity in organizations
• what feedback loops are and how to identify points of leverage to bring about positive change
• about polarity management as an alternative to implementing symptomatic solutions to complex problems
• how to reframe organizational issues to ensure they are being adequately addressed

Comments from Past Attendees
“Excellent seminar.” “Very good stimulating ideas.” “Speaker was dynamic and engaging.”

Seminar Leader
Guy Nasmyth, Ph.D.

What Do People Want? Motivating Yourself and Others
LEVEL General

Prerequisite
None

Overview
An important role of managers in the workplace is to get things done through other people. To do this they need to be able to motivate employees, but that is easier said than done! To understand motivation you must understand human nature itself, and herein lies the problem. This one-day, highly interactive course provides practical tools and techniques for understanding what motivates people and how to develop and maintain a motivated workforce.

Who Should Attend
Managers or leaders wishing to ensure highly motivated teams for top performance outcomes.

Content
In this session, you will learn
• what people really want – exploring motivation
• self motivation and keeping a positive bias
• self appraisal
• motivation theories in practice
• extrinsic and intrinsic motivation
• achievement, power and affiliation
• equitable treatment: motivating versus de-motivating
• job characteristics that encourage staff engagement
• analysis of individual motivation
• motivation across cultures
• to use effective feedback to enhance performance
• how to move beyond productivity

Comments from Past Attendees
“Excellent. Very much enjoyed it.” “Very good seminar leader – good listener and understanding of material.” “Leader was interesting, informative, and brought a passion to the topic that was very engaging.”

Seminar Leader
Dr. Shawn Ireland, M.SC., MA, E.Dd
Wiring Your Brain for High Impact Leadership
LEVEL Introductory to Intermediate

Prerequisite
None

Overview
The brain has everything to do with who we are and what we do, and leadership is all about influencing who we are and what we do. Ninety percent of what we know about the brain has been learned in the last 2 years. Come and hear what Terry Small, a leader in the field of translating brain research into practice, has to say about brain engagement and learning to lead with the brain in mind.

Who Should Attend
Individuals wishing to leverage the latest research on the brain in order to become more effective leaders.

Content
In this session, you will learn
• how you can use the growing body of research on the brain to become a more effective leader
• why the brain resists change that prevents new ideas from being accepted
• how thinking habits influence our actions, especially with problem solving and conflict resolution
And
• the 5 things that Brain Science says that leaders MUST get right.
• leading from the Mind's Eye
• rewiring your brain for leadership
• leading self and others at the edge
• the science of peak performance
• the science of not being boring
• creating influence through an understanding of the brain
• the incredible importance of being a secure base and building trust
• what the amazing discovery of mirror neurons means for leaders and their teams
• the importance of bonding
• understanding that the person is never the problem

Comments from Past Attendees
“New, relevant information was presented in an easy, understandable way.” “5-star seminar! This is a ‘must-attend’ for any manager/leader.” “Interactive, engaging, yet practical.”

Seminar Leader
Terry Small, B.Ed., MA

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Fee $450 PD Passport Valid 1 Passport Day 1 CPD Hours
Considering Starting a CPA Practice

If you are contemplating starting a practice, have not been in public practice for a considerable length of time, or have less than five years of experience in public practice, you may want to check out this free, on-demand web session.

The webinar will provide general information at the contemplation stage of starting a public practice, and will address a number of pre-registration considerations with focus on the high-level business and regulatory requirements of running a public practice. Specific content will include: personal assessment; technical competency; business planning; licensing and regulatory requirements; and summary of resources available.

Availability
This web-based, on-demand session is available on our website at pd.bccpa.ca. The session qualifies for 2 CPD hours upon successful completion of a quiz.

Starting a CPA Practice
LEVEL Introductory

Prerequisite
None

Overview
This seminar provides key information and assessment of the skill sets and tools needed to start and develop a successful CPA practice. It provides the practical knowledge needed to build a strong practice management framework, improve quality of service and client satisfaction, and explore the skills and knowledge needed to develop and build a successful practice.

Who Should Attend
New practitioners in small or medium-sized practices, particularly those with limited experience in public practice or practice management.

Members seeking to fulfill transitional legacy licensing requirements should refer to page 100 for dedicated offerings instead.

Content
- the profile of the public practitioner
- public practice regulatory framework
- professional liability insurance, how much and how to.
- setting up your practice
- business planning, marketing and staffing
- determining your practice profile
- fee levels, billing and collecting
- client management
- staffing, is it necessary?
- practice review, how to meet standards
- practice resources
- work/life balance

Comments from Past Attendees
“The topic itself is wonderful, and the material is in the right direction.”
“Incredibly helpful seminar.” “Practical information.”

Seminar Leader to be drawn from
Greg Buck, CPA, CA, Bcomm
Grant Smith, CPA, CA

Fee $425 PD Passport Valid 1 Passport Day 7 CPD Hours

SD Nexus: Public Practice Insights
PD Seminars Required for Transitional Public Practice Licensing
PD Seminars Required for Transitional Public Practice Licensing

Please note that the following are transitional legacy licensing requirements as they relate to Professional Development seminars offered through CPABC PD only. For detailed information on all requirements, please refer to the CPABC website www.bccpa.ca under Members>Public Practice>CPABC Public Practice Licensing>Practitioners Licensing, or contact the Public Practice Administrator at CPABC.

Legacy CA Public Practice
No additional PD requirements (as long as professional competence has been maintained in the desired licensing category).

Legacy CGA Public Practice

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Legacy CMA Public Practice

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<tr>
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<th>Dates/Locations</th>
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With the exception of the seminars Law Society Real Estate Council and Other Specified Procedures Reports, Income Tax Planning Refresher for Corporate Tax and Income Tax Planning Refresher for Personal Tax, these specific offerings will be made available only to members seeking to complete legacy public practice licensing requirements.

If you are a member seeking to complete the requirements, you must attend the specific offerings listed on this page.

To register, please go to our website at pd.bccpa.ca or email the PD Team at pdreg@bccpa.ca.

Note that PD sessions run from September to March (Fall/Winter) and May to July (Spring/Summer). If a seminar you require is not offered in our Fall/Winter program, or if you have missed the scheduled dates, please check back in March for our Spring/Summer offerings and dates.
An Introduction to Strategy Driven Budgeting

LEVEL Introductory to Intermediate

Prerequisite
None

Overview
Organizations need to better understand the impact of budgeting on the operations of their organizations. This seminar will cover traditional budgeting approaches, such as adjusted cost, to understand the strengths and weaknesses of these approaches before introducing Strategy-Based Budgeting (SBB), a well-established methodology that takes into account demand driven budgeting to allow for better forecasting of costs of operations.

Who Should Attend
Executive directors and senior staff who wish to understand strategy-driven budgeting, allowing their organizations to manage financial resources better while maintaining congruence with their goals.

Content
• traditional budgeting methods
• the purpose of budgeting
• how to link strategic initiatives and your business plan to your budget
• the impact of service delivery demand on fixed and variable components of the budget.
• “Good and Bad” variances, and how to better align limited resources to maximize outcomes and service delivery

Comments from Past Attendees
"I very much appreciated Bruce’s knowledge and his willingness to share it.” “Great grasp of practical challenges.” “Great anecdotes, thanks!” “Really enjoyed the material. Speaker was engaging.”

Seminar Leader
Bruce Acton, FCMC, MBA

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<th>Date</th>
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<td>Ramada Hotel, Kelowna</td>
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**Strategy, Governance, Risk & Human Resource**

An Introduction to Strategy Driven Budgeting 101
Corporate Governance Essentials 102
Corporate Governance in the Not-for-Profit Sector 102
Employment Law & HR Practices 103
Handling Termination of Employment 103
Risk Management Essentials 104
Sustaining Strategic Initiatives: Maintaining Employee Focus on Vision, Strategy, and Values 104
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Workplace Law: All You Wanted to Know About and Were Afraid to Ask 105

**Strategic Management Certificate Program**

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Team Development 107
Change Management 107
Corporate Governance Essentials
LEVEL Intermediate

Prerequisite
None

Overview
This half-day seminar aims to develop and enhance the CFO’s understanding of corporate governance using the CPA Canada’s CFO Series as the starting point for the discussion. Participants will gain the knowledge and skills they need to understand the role and responsibilities of the CFO in the context of corporate governance and their responsibilities to the Board and/or audit committee.

Who Should Attend
Financial or other executive leaders who interact with and provide support to their Board, and also audit committee and other Board members who want an understanding of their role and responsibilities surrounding corporate governance.

Content
• introduction and overview
  - what is corporate governance?
  - essential elements of corporate governance system
  - an overview of internal control frameworks
  - understanding the link between governance & strategy
  - group work: participants work through a case study and conclude on the company’s governance system
• the financial aspects of corporate governance
  - establishing the key performance indicators
  - using the ‘pyramid of ratios’ diagnostic model to uncover the drivers of organizational performance
  - board and audit committee reporting requirements
  - group work: participants match pyramids of ratios to each respective company

Comments from Past Attendees
“It was a good overview of major issues.” “Excellent presentation. Engaging presenter, made a somewhat dry topic interesting.” “Very concise presentation of the information.” “The speaker was very energetic and enthusiastic in presenting the course.”

Seminar Leader
Chris Wyman, CPA, CMA, CIA, CRMA

Nov 02 9am-12:30pm Sutton Place, Vancouver [M7200A_VA]
Fee $220 PD Passport Valid 1/2 Passport Day 3.5 CPD Hours

Corporate Governance in the Not-for-Profit Sector
LEVEL Introductory

Prerequisite
None

Overview
Not-for-profit organizations (NPOs) are diverse and their expectations of directors and good governance can vary widely. This half-day session explores some of the unique governance challenges facing NPOs and is built around CPA Canada’s 20 Questions Directors For Not-For- Profit Organizations Should Ask series.

Who Should Attend
Those who are on not-for-profit boards, considering joining a not-for-profit board, or who interact or provide support to not-for-profit boards.

Content
• governance boards versus “hands-on” working boards.
• elements of a not-for-profit corporate governance system.
• the hallmarks of effective not-for-profit boards.
• the role of board assessments and surveys.
• running effective not-for-profit board meetings

This is a highly interactive session with a number of group discussions and sample tools that can be used to help assess board and director effectiveness.

Seminar Leader
Chris Wyman, CPA, CMA, CIA, CRMA

Dec 06 9am-12:30pm Sutton Place, Vancouver [M7202A_VA]
Fee $220 PD Passport Valid 1/2 Passport Day 3.5 CPD Hours
Employment Law & HR Practices
LEVEL Intermediate to Advanced

Prerequisite
Some human resources experience and planning responsibility within your organization.

Overview
The employment relationship is founded on principles of contract law and is considered by the courts to be a special kind of contract. Participants will gain a practical perspective concerning the relationship between the legal landscape for (mostly non-union) employment in Canada, and day-to-day human resources activities that impact their organization.

Who Should Attend
Business owners, and those who advise business owners, senior managers, CFOs, and controllers who are responsible for human resources issues in the workplace.

Content
In this session, you will learn about
- issues surrounding the hiring, maintaining and dismissal of employees, based on the employment contract
- the Canadian legal culture of employment
- the nature of employment
- common law vs. Employment Standards
- the value of written contracts
- privacy
- the basics of hiring and other human resources practices
- the theory of “notice”
- constructive dismissal

Comments from Past Attendees
“Presenter was knowledgeable and relevant.” “Practical examples and current case law.” “Good presenter, lots of material.” “Very informative.”

Seminar Leader
Gavin Marshall, BA (Hons), LL.B.

Handling Termination of Employment
LEVEL Intermediate

Prerequisite
None

Overview
This session will provide an overview of issues surrounding the termination of employment, and will include any recent updates in the area. Participants will receive a comprehensive summary of employer termination liabilities, become more aware of all the issues relating to termination of employment and learn a practical framework for planning.

Who Should Attend
Anyone involved in human resources, or managers responsible for termination of employment.

Content
- when can you fire an employee?
  - dishonesty and other forms of misconduct
  - how serious does it have to be?
  - when are warnings necessary?
  - poor performance – the progressive discipline model
- how much severance do you have to pay?
  - employment standards minimums
  - reasonable notice
  - employment contracts
  - bonuses and benefits
- structuring the severance package
  - the employee's duty to look for another job
  - lump sum vs. salary continuation
- special cases
  - sanctions for "Bad Faith" behavior by employers during the termination process
  - sick or disabled employees
  - employees who have been “enticed” from secure employment
  - pregnant employees
  - avoiding human rights violations

Comments from Past Attendees
“Good, practical advice, well delivered.” “Practical application of materials, good real life examples.” “Key areas were covered.” “Great job. Very informative and a great reference.”

Seminar Leader
J. Geoffrey Howard, LL.B.
Risk Management Essentials  
LEVEL Intermediate  

Prerequisite  
None  

Overview  
This half-day seminar aims to develop and enhance the CFO’s understanding of risk management using the CPA Canada’s 20 Questions and CFO Series as the starting point for the discussion. It will provide participants with the knowledge and skills they need to understand the role of the CFO in the context of risk management and their responsibilities to the board and/or audit committee. It will also help participants understand the different Enterprise Risk Management (ERM) frameworks available and the applicability to their own organization.  

Who Should Attend  
Financial or other executive leaders who interact with and provide support to their Board. It will also be of interest to audit committee and other Board members who want an understanding of their role and responsibilities around risk management.  

Content  
• introduction and overview  
  - an overview of enterprise risk management  
  - the CFO’s responsibilities for risk management  
  - the CFO as a Board resource in fulfillment of risk oversight  
  - a definition of enterprise risk management  
  - an overview of the most popular ERM frameworks  
  - group work: participants are given different scenarios to provide feedback on adequacy of risk management processes and recommend improvements where required  
• establishing risk reporting processes  
  - the relationship between strategic planning and risk management  
  - setting risk tolerances  
  - establishing risk measures and early warning signs  
  - monitoring and reporting on risk  
  - group work: participants work through a case study to determine best risk measures to use and identify any early warning signs of risk  

Comments from Past Attendees  
“Good overview and right level of detail.” “Comprehensive review with relevant examples.” “Good information which was well broken down.”  

Seminar Leader  
Chris Wyman, CPA, CMA, CIA, CRMA  

Sustaining Strategic Initiatives: Maintaining Employee Focus on Vision, Strategy, and Values  
LEVEL Intermediate to Advanced  

Prerequisite  
None  

Overview  
Employees are all too easily distracted and disoriented in this fast paced, high pressure world of economic, technological and organizational change. Even when a business strategy is compelling and clearly communicated, employees will not automatically work their hardest, remain focused, and push for continuous improvement month after month and year after year. This course will help leaders at all levels align organizational culture with vision and strategy; make strategy stick; maintain employee focus on the big picture; manage employee attitudes and behavior; and build competitive advantage through people.  

Who Should Attend  
Leaders at all levels, from front line supervisors to senior executives.  

Content  
This practical and interactive course will not focus on strategic planning, nor on the initial execution of your plan (the roll out or launch), but rather on how to make it stick, i.e., sustaining employee focus, commitment, and action on your key strategic initiatives.  

Specific topics include  
• keeping initiatives on the table and top of mind  
• the key drivers of sustainability: strategies, tools, and tactics  
• metrics: how to measure sustainability and employee focus  
• leveraging both leadership behavior (leading by example) and organizational systems  
• creating a self-reinforcing cycle of success  
• building a real time action plan around sustaining one of your key initiatives  

Comments from Past Attendees  
“Very good course. Highly recommend it and Joel for any size organization.”  

Seminar Leader  
Joel Shapiro, Ph.D.
Top Employment Issues Affecting Your Bottom Line
LEVEL Intermediate

Prerequisite
None

Overview
This half-day course will provide an overview of the top employment issues including recent developments in workplace law, focusing on those issues that materially impact the bottom line.

Who Should Attend
Anyone dealing with employment issues, whether you are in public practice or industry.

Content
In this session, you will learn how to
- better position yourself as a business advisor to assist clients to spot an issue before it becomes a liability
- identify employment risks facing your own or client organizations, and strategies to reduce them
- keep up-to-date with recent changes in the employment law
- manage severance risk through employment agreements
- prevent workplace harassment
- manage absenteeism
- protect employer intellectual property
- avoid hidden employment standards liabilities
- defensibly use of contractors
- identify privacy compliance hot spots

Comments from Past Attendees
"A very good overview of employment issues." “I enjoyed the examples from real life.” “A practical seminar.”

Seminar Leader
J. Geoffrey Howard, LL.B.

Workplace Law: All You Wanted to Know About and Were Afraid to Ask
LEVEL Intermediate

Prerequisite
Some human resources capability and planning responsibility within your organization.

Overview
This course will cover the legal issues in workplace law that most frequently arise, impacting your organization's ability to deal effectively with human resources. Participants will be able to address with greater confidence workplace human resources issues that spill over into legal or potentially legal questions, and avoid common potential pitfalls in workplace legal issues.

Who Should Attend
Employers or those who advise employers, business owners, senior managers, CFOs, and controllers who are responsible for human resources issues in the workplace, have issues that arise regarding workplace and employment law in British Columbia, and have common productive questions they wish to pose.

Content
The subject matter of the seminar will depend in part on the specific topics that participants wish to address, but may include topics such as
- issues that arise for employers under the Employment Standards Act
- hiring practices, attendance management and absenteeism
- human rights accommodation of disabled employees
- termination of employment with and without cause and best practices related to termination post-employment obligations

Note
Participants should come to the session ready to participate with their own questions of a general nature, and will receive educational answers of a general nature related to common workplace law issues. No specific legal advice will be provided.

Comments from Past Attendees
"One of the best seminars I've ever attended.” “Very good and useful presentation.” “I enjoyed this a lot. Interesting topics… enjoyed hearing about real life examples.”

Seminar Leader
Gavin Marshall, BA (Hons), LL.B.
Strategic Management Certificate Program

CPABC is pleased to present the Strategic Management Certificate Program. This four-part program focuses specifically on the critical components of leadership and strategy.

The four modules are:
1. Strategic planning
2. Risk management and governance
3. Team development
4. Change management

Each module is worth 7 CPD Hours. In order to qualify for the certificate, members are required to complete all four modules. Modules do not need to be taken in order.

Overview

The program allows participants to acquire substantive knowledge in these core business topics.

At the end of the program, participants will have learned about the core competencies to successfully develop teams, enable change management within their organizations, risk assessment and governance best practices, and how to guide strategic planning into implementation through all phases of an organization’s product/service life cycle.

Who Should Attend

Mid-managers and leaders transitioning to management or executive roles where this knowledge plays a key role in making, and successfully implementing, sound business decisions.

Seminar Leader to be drawn from
Mia Maki, BA, MBA, FCPA, FCMA
Barbara VanDerLinden, FCPA, FCMA

See following the column and page for description and dates of each session.

Strategic Planning

This interactive session will use case examples to examine the link between stated organizational goals, the business environment and visible strategies, with focus on the functional strategy level. You will gain an appreciation of the tools used to develop and execute successful strategies. You will also examine the strategies of your own organization relative to the competitive landscape. Exercises will provide opportunities to consider your own role relative to strategy formulation, execution and monitoring, and highlight opportunities to increase personal effectiveness.

Content

In this session, you will learn
- how organizations spot strategic opportunities and threats
- tools and processes for strategic planning used by leading companies
- effective practices for successful strategy execution throughout your organization
- opportunities to increase personal effectiveness in supporting your organization’s strategy

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Risk Management and Governance

This interactive session will examine different types of risks which can undermine the achievement of an organization’s objectives, and the management approaches and tools used to manage them. You will examine the risk management policies, practices, and reporting used by leading organizations, assess your organization’s approach to risk and consider your own role in this process. We will also overview director and board responsibilities and take an in-depth look at governance practices, with focus on not for profits, where many CPAs serve as volunteer directors. You will gain an appreciation of how these requirements link to your own role. This session is a must for members considering serving as directors, now or in the future.

Content

In this session, you will learn
- how to spot and assess a wide variety of risks
- tools and techniques for reducing the impact of risks on your organization
- how to implement risk reporting tools
- what are governance responsibilities and current practices
- how board structures and processes can help boards and directors perform
- how to increase your effectiveness in supporting risk management and governance in your organization

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Team Development

Today’s complex problems require the skills of diverse teams, and effective team performance is essential to success. This interactive session will provide participants with an in-depth understanding of factors impacting team effectiveness, including team design, stages of team development, and ingredients necessary for achieving results. Through experiential exercises, you will gain a greater appreciation of how team norms, internal team factors and communication patterns can enhance or hinder team performance and to understand the characteristics of successful teams. Small group and individual work will provide an opportunity to sharpen your teaming skills, to consider how personalities and your own personal style impact on team performance, and how you can support a team as a leader.

Content
In this session, you will learn
• the stages of team development
• how important it is to effectively design a team
• factors necessary for team success
• how to coach teams for increased effectiveness
• common norms of well-performing teams
• how communication patterns affect team results

Change Management

Why do most change initiatives fail? And why are some organizations good at ‘change’? In a world where change is an imperative, this interactive session will focus on how organizations can improve the odds and how your leadership can support successful change. Participants will learn how organizational and human dynamics impact change initiatives, how to plan for change and will examine the main ingredients necessary for successful implementation. You will increase your understanding of reasons for resistance and how to win support. Interactive exercises will provide practice in change planning and implementation, and case studies will enhance your understanding of the ‘art’ of change.

Content
In this session, you will learn
• how to increase awareness and the impact organizational and human dynamics have on change initiatives
• the main steps in a change management process
• the importance of detailed and realistic transition plans
• how to increase the probability of successful change implementation

Nov 27 9am-5pm Hyatt Regency, Vancouver [M73035C_VA]
Feb 16 9am-5pm Sutton Place, Vancouver [M73035D_VA]
Fee $450 PD Passport Valid 1 Passport Day 7 CPD Hours

Nov 06 9am-5pm Sutton Place, Vancouver [M73045B_VA]
Feb 05 9am-5pm Marriott Inner Harbour, Victoria [M73045C_VI]
Feb 15 9am-5pm Sutton Place, Vancouver [M73045D_VA]
Fee $450 PD Passport Valid 1 Passport Day 7 CPD Hours
## Taxation

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## Conference

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Basic Tax Compliance in Self-Employment & Home-Based Business

LEVEL: Introductory

Prerequisite
Familiarity with the existing tax rules in the ITA.

Overview
You're your own boss. For the most part, you dictate the hours and call the shots, but you're stuck with all the paperwork too. What do you need to know to make sure you're compliant with your tax obligations? This seminar will cover the fundamental tax compliance issues of setting up and running a self-employed small home business.

Who Should Attend
Entrepreneurs and financial planners who advise clients with small home-based, unincorporated businesses.

Content
Discussions will revolve around the various tax issues involved in the start-up and ongoing reporting for a small home-based and unincorporated business, including:

- employment vs. self-employment
- adventure in the nature of trade
- reporting revenue
- reasonable expenses
- automobile expenses
- home office expenses
- interest deductibility
- application of losses
- overview of GST/PST compliance
- payroll compliance

Note
This seminar will focus on the basic tax compliance issues of a self-employed unincorporated business. Those interested in more business structural and tax planning topics should consider taking the seminar Tax Issues in Starting a Business.

Comments from Past Attendees
"It was good, very informative."  "Good overview of many topics with the right amount of focus."

Seminar Leader
Mark Ostry, CPA, CGA

February 08  8am-10am  Sutton Place, Vancouver  [T71013A_VA]
Fee $130  PD Passport Valid  1 Passport Day  2 CPD Hours

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Advanced Tax Planning Strategies

LEVEL: Advanced

Prerequisite
Participants should have a good knowledge of personal and corporate income tax.

Overview
This full-day seminar begins with a comprehensive review of various anti-avoidance provisions designed to prevent or discourage aggressive tax planning. It is an in-depth seminar that moves along quickly due to the volume of topics presented and discussed.

Who Should Attend
Practitioners with a strong Canadian tax planning background who wish to add value to existing and potential client relationships by giving consideration to potential tax and estate planning opportunities.

Content
• managing tax avoidance risks
• restructuring asset profiles – important planning strategies
• business sale planning matters
• tax planning using partnership business structures
• tax planning using trust relationships
• inter-provincial planning (Alberta trusts) – appendix only
• general anti-avoidance rule
• share-holder benefit provisions
• arm’s length relationships
• expense deductibility
• inadequate consideration
• attribution provisions
• stop-loss provisions
• surplus stripping, association etc.
• various tax planning strategies are presented that are divided into four main categories: restructuring asset profiles; sale of business; use of partnerships; use of trusts
• factual scenarios are provided in the materials that address objectives, statutory provisions, case law, results and risk analysis

Comments from Past Attendees
"Very knowledgeable seminar leaders, very good seminar materials."  "Practical reference material – very informative."  "Good summary of some tax planning ideas."

Seminar Leader to be drawn from
Sheryne Mecklai, CPA, CA, TEP
Mary Power, CPA, CA

November 07  9am-5pm  Victoria Conf Ctr, Victoria  [T73040A_VI]
November 21  9am-5pm  Van Conv Ctr West, Vancouver  [T73040B_VA]
November 24  9am-5pm  Quality Hotel, Abbotsford  [T73040C_AB]
January 23  9am-5pm  Sheraton Guildford, Surrey  [T73040D_SU]
Fee $425  PD Passport Valid  1 Passport Day  7 CPD Hours
Catching Up: 5 Years of Income Tax Developments

LEVEL Intermediate

Prerequisite
Comprehensive understanding of basic corporate and personal income tax.

Overview
Income tax changes and evolves over time. “Keeping up” is necessarily a continuous process. Unfortunately, many people don’t have the time or resources and consequently fall behind. They wonder how they can “catch up” on a few recent years of changes at one time. This seminar will provide an opportunity for those who haven’t regularly taken tax update seminars to get “caught-up” on notable federal income tax developments over the past five years and find out what they may have missed.

Who Should Attend
Anyone, whether in public practice, industry, or the public sector, who feels that they have not paid enough attention to recent income tax developments.

Content
- calculation of income
- expenses and deductions
- capital cost allowance
- taxation of gains
- retirement saving
- income splitting
- tax credits
- rules that defer, deem, trigger, prevent or reduce
- income tax rates
- income tax administration
- various other developments

Coverage will also answer questions such as: How has the income tax scene changed? What changes are coming? What new tax pitfalls/strategies have arisen? Where are the new opportunities? What long-time tax strategies have been eliminated or have become more/less beneficial? What other changes need to be considered to facilitate efficient and effective income tax compliance, planning and administration?

Comments from Past Attendees
"Instructor was excellent, sufficient depth and breadth. “Good pace, good examples, and covered a very broad scope in a short period of time with a lot of practical information.”

Seminar Leader to be drawn from
Tara Benham, FCPA, FCA
Denise Lammi, CPA, CA
Mark Ostry, CPA, CGA

Oct 19 9am-5pm Coast Capri, Kelowna [T73060A_KE]
Oct 27 9am-5pm Marriott Inner Harbour, Victoria [T73060B_VI]
Nov 07 9am-5pm Sheraton Guildford, Surrey [T73060C_SU]
Nov 10 9am-5pm Quality Hotel, Abbotsford [T73060D_AB]
Nov 20 9am-5pm Van Conv Ctr West, Vancouver [T73060E_VA]
Fee $425 PD Passport Valid 1 Passport Day 7 CPD Hours
Corporate Reorganizations
LEVEL Advanced

Prerequisite
Familiarity with the existing tax rules in the ITA.

Overview
Your client's business and personal situation is constantly changing. The existing business structure may no longer be suitable or ideal and your client is looking for tax-efficient alternatives. There are a number of corporate reorganization alternatives that can be implemented under the Income Tax Act. Some of the provisions are complex and often interact with related provisions or anti-avoidance provisions.

This full-day seminar highlights the fundamental income tax considerations that arise in corporate reorganizations, including a discussion of related provisions and key pitfalls to avoid. The seminar will use extensive examples to illustrate tips and traps to be aware of when initiating a corporate reorganization.

Who Should Attend
Practitioners or financial executives in industry who have some, but not extensive, experience in share/debt reorganization, consolidation, wind-ups and amalgamations and the GAAR.

Participants in this course may also find the Section 85: Transfer of Property and Advanced Tax Planning Strategies courses beneficial.

Content
• tax-deferred rollovers (other than Section 85)
• wind-ups
• amalgamations
• share exchanges and reorganizations
• anti-avoidance provisions
• convertible securities

Comments from Past Attendees
“Great seminar, well laid out and well presented. Seminar leaders were very knowledgeable in the subject matter.” “Instructors were particularly well informed.” “Good use of examples.” “Excellent presenters who shared plenty of practical advice.” “This is a very practical course.”

Seminar Leader to be drawn from
Mike Coburn, BA(Hon), LL.B.
Shane Onufrechuk, FCPA, FCA

CRA Business Audits and Settlement Strategies
LEVEL Intermediate

Prerequisite
Familiarity with the existing tax rules in the ITA.

Overview
This session will introduce you to the CRA's income tax dispute resolution process by providing an understanding of the appropriate steps required to obtain cost-effective and efficient resolution of tax disputes. Topics include; current audit issues, strategies for winning tax disputes and settlements, dealing with the audit division and CRA's powers of inspection, what to do when CRA comes calling, the reassessment stage, and notices of objection.

Who Should Attend
Those who deal with the CRA in tax audits, whether on an infrequent or regular basis.

Content
• current business audit issues and areas of CRA audit focus
• what to expect from a CRA audit, including taxpayer and advisors’ rights and obligations and CRA’s Code of Conduct
• stages of a CRA audit and how to respond to each
• strategies for achieving positive audit settlement outcomes

Seminar Leader
Ed Kroft, Q.C., CPA (Hon.)

Jan 29 8am-10am Sutton Place, Vancouver (T71111A_VA) Fee $130 PD Passport Valid 1/3 Passport Day 2 CPD Hours
Current Strategies in Tax Dispute Resolution  
LEVEL Intermediate

Prerequisite
None

Overview
This half-day seminar is designed to introduce practitioners to the CRA dispute resolution process, and to provide an understanding of the importance of taking the appropriate steps as a means of obtaining cost effective and efficient resolution to potential tax litigation matters.

Who Should Attend
Those who deal with the CRA, whether on an infrequent or regular basis.

Content
- current audit issues
  - some of the areas now under review
- strategies for winning tax disputes
  - records retention policies
  - what you can keep or throw away
  - organizing files
- dealing with the audit division
  - CRAs power of inspection
  - what clients should do when CRA comes calling
  - responding to proposal letters
  - the reassessment stage – notices of objection
  - validity of the reassessment
  - gathering information from CRA to contest the reassessment
  - drafting notices of objection
- appeals to the Tax Court of Canada and the Federal Court
  - which is the correct forum
  - accountants serving as (expert) witnesses
  - role of the accountant in judicial proceedings

Comments from Past Attendees
“Good opportunity to ask questions and discuss issues. Great reference material.” “Comprehensive coverage of topics discussed.” “Liked the pace of the presentation and the opportunity for discussions and questions from the participants.”

Seminar Leader
Ed Kroft, Q.C., CPA (Hon.)

Everyday Income Tax Issues for the General Practitioner  
LEVEL Intermediate

Prerequisite
Familiarity with the existing tax rules in the ITA.

Overview
This full-day seminar deals with income tax issues that general practitioners encounter every day. Topics will be approached as practical issues rather than technical details. General background information will be provided to promote an understanding of each issue. Practical concerns, problems, suggestions and planning will be emphasized.

Who Should Attend
Practitioners who have general income tax knowledge and deal with small and medium-sized owner-managed businesses.

Content
- issues and recent developments related to the taxation of select sources of income including active business income, small business deduction, management fees, employees vs. contractors and personal services businesses
- remuneration issues – including integration, salary vs. dividends, salary reasonableness, income splitting with family members, bonuses payable
- expenses/assets with both a personal and business element – including meals and entertainment, automobiles, taxable benefits
- shareholder benefits and loans issues – including debit balances
- timely and topical practical matters of interest to Practitioners
- newsy and notable information, ideas and resources of interest to general practitioners
- challenging ethical situations encountered in a tax practice
- ideas and resources of interest to general practitioners

Ethics Content
This seminar qualifies for 0.75 hours of ethics content.

Seminar Leaders to be drawn from
Tara Benham, FCPA, FCA
Mark Ostry, CPA, CGA
Denise Lammi, CPA, CA
Andrew Taylor, CPA, CA

Dec 14 9am-12:30pm Van Conv Ctr West, Vancouver [T72112A_VA]
Fee $220 PD Passport Valid 1/2 Passport Day 3.5 CPD Hours

Oct 20 9am-5pm Sutton Place, Vancouver [T73090A_VA]
Oct 25 9am-5pm Executive Plaza, Coquitlam [T73090B_CO]
Oct 26 9am-5pm Marriott Inner Harbour, Victoria [T73090C_VI]
Nov 01 9am-5pm Quality Bayside, Parksville [T73090D_PA]
Nov 02 9am-5pm Ramada Hotel, Kelowna [T73090D_KF]
Nov 09 9am-5pm Quality Hotel, Abbotsford [T73090E_AB]
Dec 13 9am-5pm Sheraton Guildford, Surrey [T73090F_SU]
Feb 06 9am-5pm Sutton Place, Vancouver [T73090G_VA]
Fee $425 PD Passport Valid 1 Passport Day 7 CPD Hours
Getting a GRIP on RDTOH, CDA & Other Tax Accounts
LEVEL Intermediate

Prerequisite
Familiarity with the existing tax rules in the ITA.

Overview
Tax planners are confronted with a multitude of tax accounts that need to be considered in conjunction with each other and which are affected by changing tax rates for eligible and ineligible dividends, and most recently the changes to the Part IV tax rate and the increased need to consider safe income. This course will provide a detailed review of the key tax accounts for private corporations and tax planning where multiple tax accounts can either be used or impacted.

The course includes a series of mini-cases that demonstrate the issues that need to be evaluated when dealing with these accounts.

Who Should Attend
Professional accountants involved in tax planning for privately held companies and their shareholders.

Content
• basic considerations for all tax accounts
• GRIP
• LRIP
• RDTOH
• CDA
• safe income
• mini cases

Comments from Past Attendees
“Good refresher. Case studies are useful.” “Excellent! Good materials.” “Very good. Brought together some important issues. Well done!” “Instructors and materials are great.”

Seminar Leaders
Sandy Stedman, CPA, CA
Mike Stubbing, CPA, CA, CFP, TEP

GST/HST: The Basics
LEVEL Intermediate

Prerequisite
Familiarity with basic requirements GST/HST filings.

Overview
Canada’s federal goods and services tax (GST/HST) is not a simple tax. This course introduces participants to the numerous GST and HST issues that are required to have a basic of understanding of this complex tax. Since many businesses are GST registrants and many provinces have adopted the HST, it is essential to know how the tax works and when to register. Participants will learn how to use the GST and HST place-of-supply rules for the different types of supplies and learn how to claim input tax credits minimizing common audit exposures. An overview of frequently misunderstood real property, cross border, temporary large business restrictions, and public service body issues will be discussed.

Who Should Attend
General practitioners, accountants and other advisers who provide advice on, or participate in a range of business transactions.

This course will focus on the definitions, GST and HST place-of-supply rules and the basic concepts for the recovery of tax so participants will have a fundamental understanding of how the tax works. Participants interested in beyond the basics of GST/HST may consider attending GST/HST – Beyond the Basics (see page 114). Those interested in an in-depth review of real estate should consider GST/HST & Real Property (see page 115), and those interested in not-for-profit topics should consider GST/HST Issues for the Not-for-Profit Sector (see page 116).

Content
• fundamental concepts including “commercial activity” and “supply”
• registration, collection and reporting rules including GST and HST place of supply rules
• review of input tax credit entitlement rules and other rebates including employee reimbursements
• overview of the zero-rating provisions and exemptions including exports, transactions with non-residents, health care providers, and public service bodies

Seminar Leader
Ron Osborne, CPA, CA
GST/HST: Beyond the Basics
(formerly GST/HST Refresher for Professionals)
LEVEL Intermediate

Prerequisite
Good understanding of the basics of the GST/HST system, or previous attendance of GST/HST – The Basics.

Overview
The application of GST/HST is often far more complex than practitioners or businesses appreciate; the principles involved are often quite different than those applied to income tax. Failure to be aware of these complexities can result in lost opportunities, or worse, large tax assessments. In addition to reviewing the importance of proper characterization and identification of taxable supplies, this course will review input tax credit entitlements and some of the more common and important exemptions and zero-rating provisions, many of which have been subject to important changes in recent years. We will also review common registration and reporting errors as well as the director liability provisions.

Who Should Attend
General practitioners, company accountants and other advisers who provide advice on, or participate in a range of business transactions.

Those interested in an in-depth review of real estate should consider attending GST/HST & Real Property seminar (see page 115) and those interested in not-for-profit topics should consider attending GST/HST Issues for the Not-for-Profit Sector (see page 116).

Content
• cost-recoveries, grants, tenant improvements and other often misidentified or overlooked supplies
• review of input tax credit entitlement rules and allocation principles, including common ITC errors
• registration, collection and reporting rules, including special rules for partnerships and joint-ventures, intercompany supplies (RC4616), issues related to sale of a business and recent HST rate changes
• brief review of important zero-rating provisions and exemptions (and misconceptions) including, exports, transactions with non-residents, financial services and healthcare services.
• review of the important director liability rules

Seminar Leader to be drawn from
Charlotte Hoggard, CPA, CA, CFI
Ron Osborne, CPA, CA

Oct 27 9am-5pm  Coat Hotel, Kamloops  [T7301D1A_KA]
Oct 30 9am-5pm  Quality Bayside, Parksville  [T7301D1B_PA]
Nov 06 9am-5pm  Victoria Conf Ctr, Victoria  [T7301D1C_VI]
Nov 08 9am-5pm  Hyatt Regency, Vancouver  [T7301D1D_VA]
Nov 22 9am-5pm  Ramada Hotel, Prince George  [T7301D1E_PG]
Nov 27 9am-5pm  Ramada Hotel, Kelowna  [T7301D1F_KE]
Dec 07 9am-5pm  Executive Plaza, Coquitlam  [T7301D1G_CO]
Dec 15 9am-5pm  Sheraton Guildford, Surrey  [T7301D1H_SU]
Feb 13 9am-5pm  Sutton Place, Vancouver  [T7301D1I_VA]
Fee $425 PD Passport Valid 1 Passport Day 7 CPD Hours

GST/HST: Preparing for an Audit
LEVEL Intermediate

Prerequisite
Good understanding of the basics of the GST/HST system, or previous attendance of GST/HST – The Basics.

Overview
The application of GST/HST is often far more complex than practitioners or businesses appreciate; the principles involved are often quite different than those applied to income tax. Failure to be aware of these complexities can result in lost opportunities, or worse, large tax assessments. In addition to reviewing the importance of proper characterization and identification of taxable supplies, this course will review input tax credit entitlements and some of the more common and important exemptions and zero-rating provisions, many of which have been subject to important changes in recent years. We will also review common registration and reporting errors as well as the director liability provisions.

Who Should Attend
General practitioners, company accountants and other advisers who provide advice on, or participate in a range of business transactions.

Those interested in an in-depth review of real estate should consider attending GST/HST & Real Property seminar (see page 115) and those interested in not-for-profit topics should consider attending GST/HST Issues for the Not-for-Profit Sector (see page 116).

Content
• cost-recoveries, grants, tenant improvements and other often misidentified or overlooked supplies
• review of input tax credit entitlement rules and allocation principles, including common ITC errors
• registration, collection and reporting rules, including special rules for partnerships and joint-ventures, intercompany supplies (RC4616), issues related to sale of a business and recent HST rate changes
• brief review of important zero-rating provisions and exemptions (and misconceptions) including, exports, transactions with non-residents, financial services and healthcare services.
• review of the important director liability rules

Seminar Leader
Katherine Xilinas, LL.B.

Nov 24 9am-5pm  Van Conv Ctr West, Vancouver  [T73291A_VA]
Fee $425 PD Passport Valid 1 Passport Day 7 CPD Hours
GST/HST: Tips and Traps
LEVEL Intermediate

Prerequisite
Familiarity with GST/HST fundamentals and some knowledge of the Excise Tax Act.

Overview
This session will serve as an introduction/refresher to common GST/HST tips and traps. It is a high level overview designed to make you aware of common mistakes and audit issues, and to help you better design the efficiency of your (your clients’) GST/HST function. It is designed to be broad in scope and will not focus on any particular industry.

Who Should Attend
Advisors and industry practitioners who assist their clients or employers with any GST/HST matters, including planning, compliance, and audit support.

Content
• place of supply rules
• zero-rated exports
• input tax credits entitlements and restrictions
• common GST/HST elections

Seminar Leader
James Capobianco

Feb 07 8am-10am Sutton Place, Vancouver Fee $150 PD Passport Valid 1/3 Passport Day 2 CPD Hours

GST/HST & Real Property
LEVEL Intermediate

Prerequisite
Good understanding of GST/HST and input tax credit system.

Overview
The application of GST/HST to real property transactions can be very complex, particularly when part of the property may include a residential property. Failure to appreciate these complexities, especially rules related to deemed supplies and exemption entitlements can result in significant and unexpected liabilities. This seminar will help you increase awareness of some of the important concepts and rules including the deemed self-supply rules, identification of and distinction between taxable and exempt sales and rentals of real property, input tax credit and rebate entitlements and problems associated with leasehold allowances, vacation rental property, care facilities and supplies of real property by charities and other public service bodies.

Who Should Attend
General practitioners and advisors involved in the purchase, sale or rental of real property.

Content
• introduction and basic concepts
• deemed self-supply rules
• major exemptions
• important difference between condominium and bare land stratas
• construction and ‘sale’ of residential projects on leased land
• residential rebates
• collection and remittance of tax
• use of joint ventures
• input tax credit entitlements & restrictions
• special rules for not-for-profit sector

Comments from Past Attendees
“Very practical and useful for everyday scenarios I've come across.”
“Logical format, concise topics.”
“Good coverage of relevant issues.”
“Lots of detailed information and materials to refer back to.”

Seminar Leader
Ron Osborne, CPA, CA

Oct 30 9am-5pm Sheraton Guildford, Surrey Fee $425 PD Passport Valid 1 Passport Day 7 CPD Hours
Nov 07 9am-5pm Victoria Conf Ctr, Victoria Fee $425 PD Passport Valid 1 Passport Day 7 CPD Hours
Dec 15 9am-5pm Van Conv Ctr West, Vancouver Fee $425 PD Passport Valid 1 Passport Day 7 CPD Hours
**GST/HST Issues for the Non-Profit Sector**

**LEVEL** Introductory to Intermediate

**Prerequisite**
Good general understanding of GST/HST system.

**Overview**
The non-profit sector covers a wide spectrum of activities including clubs and professional associations, schools, hospitals, supportive housing and health services, and other charitable works. The application of GST/HST to these activities and its recovery through rebates and input tax credits is usually far more complex than in a commercial enterprise and may vary significantly depending on the legal form of the organization. Failure to be aware of these complexities can result in lost opportunities or worse, large tax assessments against the organization.

This seminar will focus on the unique rules applicable to public service bodies, including the distinction between charities and other non-profit organizations. Other exemptions which may apply to some non-profit organizations, such as health care or education, will be reviewed briefly. The course will also briefly examine issues related to the construction of housing and similar property by non-profit organizations.

At the end of this one day seminar, attendees will have a greater awareness of the application of GST/HST and exempting provisions applicable to this unique sector, including common pitfalls and errors.

**Who Should Attend**
Persons involved in the accounting for non-profit organizations including directors, general practitioners or other advisors who are responsible for, or provide advice on financial matters to, such organizations.

**Content**
- brief review of GST/HST basics including relevant GST/HST place of supply rules
- review of issues related to grants, donations and fund-raising activities
- review of GST/HST exemptions unique to public service bodies (other than municipalities)
- GST/HST rebates and input tax credit entitlements
- GST/HST registration and accounting
- review of common pitfalls & errors

**Comments from Past Attendees**
"Excellent course for NPO sector.” “Useful information that relates to specific clients.” “Very practical and valuable.” “A great course covering a specific topic.”

**Seminar Leader**
Ron Osborne, CPA, CA

Hey Conv Ctr West, Vancouver  [T73190A VA]

Fee $425  PD Passport Valid  1 Passport Day  7 CPD Hours

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**Income Tax Issues Dealing with Real Estate**

**LEVEL** Intermediate

**Prerequisite**
Familiarity with the existing tax rules in the ITA.

**Overview**
This seminar identifies and reviews significant income taxation issues arising in various aspects of real estate activities. Starting with a review of the structures available to undertake real estate transactions, the course follows with a detailed look at income tax issues arising on the acquisition, development, holding and then disposition of Canadian real estate. The seminar includes practical, business-focused comments on dealing with many of these tax issues. While a brief overview of GST, HST and provincial tax issues is undertaken, participants should be aware that due to its emphasis on income taxes, this course does not provide a detailed or complete discussion of the impact of indirect taxes on real estate.

At the end of this seminar the participant should have the ability to identify specific income tax issues related to real estate activities and understand the implications of tax issues involved in dealing with most common forms of real estate investment.

**Who Should Attend**
Practitioners in public practice and members in industry who need to be aware of and/or work with income taxation issues arising in real estate transactions.

**Content**
The course content consists of a review of income tax issues in the following areas
- alternative structures for investment in real estate
- issues arising before the acquisition of property
- acquisition and holding of real property
- development issues
- holding properties (including rental and Capital Cost Allowance)
- dispositions of properties
- corporate reorganization rules and real estate
- introduction to the concepts of Indirect taxes (i.e. GST and HST) affecting real estate transactions
- provincial matters

**Seminar Leader**
Tim Duholke, FCPA, FCA, TEP

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<td>[T73180B VA]</td>
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<tr>
<td>Feb 13</td>
<td>9am-5pm</td>
<td>Four Seasons, Vancouver</td>
<td>[T73180C VA]</td>
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<td>Fee $425</td>
<td>PD Passport Valid</td>
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Income Tax Issues for the File Preparer  
LEVEL Intermediate

Prerequisite  
General corporate and personal income tax knowledge.

Overview  
Accountants who prepare files and income tax returns often see the issues, problems and opportunities first. This seminar uses the seminar material from *Everyday Income Tax Issues for the General Practitioner*, but it is presented with a focus on matters more relevant to the “front line” firm members. Planning, problems, and approaches will be emphasized because in real life, client situations don’t come with an instruction manual.

Who Should Attend  
Tax preparers, including technicians, para-professionals, newly qualified accountants, or staff accountants, who have (or are learning) general income tax knowledge and deal with small and medium-sized businesses that are owner-managed.

Content  
- issues and recent developments related to the taxation of select sources of income including active business income, small business deduction, management fees, employees vs. contractors and personal services businesses  
- remuneration issues – including integration, salary vs. dividends, salary reasonableness, income splitting with family members, bonuses payable  
- expenses/assets with both a personal and business element – including meals and entertainment, automobiles, taxable benefits  
- shareholder benefits and loans issues – including debit balances  
- timely and topical practical matters of interest to Practitioners  
- challenging ethical situations encountered in a tax practice  
- ideas and resources of interest to general practitioners

Ethics Content  
This seminar qualifies for 0.75 hours of ethics content.

Comments from Past Attendees  
“Many tips and tricks offered, interesting side stories.” “This was a great refresher.” “It was fast paced, and the stories provided helped to support the information and kept it interesting.”

Seminar Leader  
Denise Lammi, CPA, CA

Income Tax Planning Refresher for Corporate Tax  
LEVEL Intermediate

Prerequisite  
Participants may wish to consider attending *Tax Returns: Corporate* prior to taking this seminar, or should have equivalent experience in corporate tax matters.

Overview  
This two-day refresher seminar is designed for those who desire to update their knowledge in the various taxes and tax planning for the privately controlled corporate taxpayer. This seminar has a strong emphasis on the application of tax for the Canadian Controlled Private Corporation. At the end of the two days participants should have a good understanding of the taxes that impact corporations.

Who Should Attend  
Those involved in corporate tax matters for private corporations that desire to expand or refresh their knowledge of corporate tax.

Content  
- organization of the Tax Act as it relates to corporations  
- determination of residency  
- various income items and deductions not commonly seen  
- calculation of corporate taxes  
- common definitions under the Income Tax Act that impact a corporate taxpayer, including related parties, affiliated parties, and associated corporations  
- various sources of income, including active business income, investment income, specified investment business and personal service businesses.  
- commonly used corporate reorganization provisions: the use of the section 85 rollover; section 86 capital reorganization; section 87 amalgamation; section 88 wind-up  
- section 84.1 and section 55(2) anti-avoidance provisions  
- corporate attribution  
- loss utilization  
- owner manager remuneration planning  
- estate planning  
- issues for buy-sell agreements and purchase and sale of business  
- acquisition of control  
- debt forgiveness

Comments from Past Attendees  
“This was an excellent course, and the instructors were great!” “This course was well presented and worth the time and money.” “Definitely valuable resource for me.”

Seminar Leaders to be drawn from  
Randall Hay, CPA, CA, MBA, FEA  
Mary Power, CPA, CA  
Andrew Taylor, CPA, CA
Income Tax Planning Refresher for Personal Tax

LEVEL Intermediate

Prerequisite
Participants may want to consider attending Tax Returns: Personal prior to taking this seminar, or should have equivalent experience in preparing personal tax returns.

Overview
This refresher seminar is ideal for those participants who desire to renew their knowledge in personal tax, trusts and partnerships and review some planning opportunities in those areas.

Who Should Attend
Those involved in personal tax matters who wish to expand or refresh their knowledge in the area of personal tax.

Content
• how to research a tax issue
• determination of residency
• liability for taxes in Canada
• administrative issues
• employment income
• benefits and related deductions
• calculations of the various sources of investment income
• taxation of capital gains
• capital losses and the impact of the stop loss rules
• allowable business investment losses
• attribution rules
• registered retirement pension plans
• RRSPs
• individual pension plans
• deferred plans such as TFSA, RESP and RDSP
• rental and farm income
• treatment of shareholder loans
• various deductions from net income such as the capital gains exemption
• calculation of taxes payable, including discussions on tax credits
• taxation of partnerships
• death of a taxpayer
• taxation of family trusts

Comments from Past Attendees
“Good comprehensive review, good notes.” “Very practical examples provided in class. Lots of discussion.”

Seminar Leaders
Mark Ostry, CPA, CGA
Mary Power, CPA, CA

Dec 06-07 9am-5pm Coast Capri, Kelowna [T74020C_KE] 11 CPD Hours
Jan 18-19 9am-5pm Marriott Inner Harbour, Victoria [T74020B_VI] 11 CPD Hours
Jan 25-26 9am-5pm Sutton Place, Vancouver [T74020D_VA] 11 CPD Hours
Fee $785 PD Passport Valid 2 Passport Days 14 CPD Hours

Income Tax Update 2017

LEVEL Intermediate

Prerequisite
Comprehensive understanding of basic corporate and personal income tax.

Overview & Content
Providing a detailed summary of tax law changes in the past year, this seminar examines current changes and relevant issues in taxation that affect individuals and most businesses in the private sector. Learn how the current levels of tax rates affect and possibly change accepted tax planning techniques. The proposals from the Federal Budget, as well as other sources of information are discussed together with other subjects of current relevance. The seminar will benefit practitioners who need current information to advise clients, deal with the CRA, and who want to update their existing knowledge of income tax issues to incorporate developments in the past year. Those looking for an update of more than one year may consider Catching Up (see page 110). Content includes: tax rate changes/integration; Federal Budget (2017); information from CRA and Department of Finance; tax cases; CRA technical interpretations; and provincial/territorial updates.

Seminar Leaders to be drawn from
Dwayne Dueck, CPA, CA
Lee-Lynn Gan, CPA, CA
Ed Kroft, Q.C., CPA(Hon.)
Elvin Law, CPA, CGA
Mark Ostry, CPA, CGA
Brian Sanders, CPA, CA
Jonathan Wright, JD

Oct 18 9am-5pm Sutton Place, Vancouver [T73000A_VA]
Oct 24 9am-5pm Executive Plaza, Coquitlam [T73000B_CO]
Oct 24 9am-5pm Coast Capri, Kelowna [T73000C_KE]
Oct 26 9am-5pm Sheraton Guildford, Surrey [T73000D_SU]
Oct 27 9am-5pm Hyatt Regency, Vancouver [T73000E_VA]
Nov 01 9am-5pm Quality Hotel, Abbotsford [T73000F_AB]
Nov 03 9am-5pm Quality Bayside, Parksville [T73000G_PA]
Nov 06 9am-5pm Sutton Place, Vancouver [T73000H_VA]
Nov 07 9am-5pm Best Western Wesley, Courtenay [T73000I_CR]
Nov 08 9am-5pm Victoria Conf Ctr, Victoria [T73000J_VI]
Nov 09 9am-5pm Van Island Conf Ctr, Nanaimo [T73000K_NA]
Nov 09 9am-5pm Executive Airport, Richmond [T73000L_RI]
Nov 15 9am-5pm Sutton Place, Vancouver [T73000M_VA]
Nov 20 9am-5pm Coast Hotel, Kamloops [T73000N_KA]
Nov 20 9am-5pm Van Conv Ctr West, Vancouver [T73000O_VA]
Nov 24 9am-5pm Executive Hotel, Burnaby [T73000P_BU]
Nov 25 9am-5pm Van Conv Ctr West, Vancouver [T73000Q_VA]
Nov 27 9am-5pm Victoria Conf Ctr, Victoria [T73000R_VI]
Nov 28 9am-5pm Sutton Place, Vancouver [T73000S_VA]
Nov 29 9am-5pm Ramada Hotel, Prince George [T73000T_PG]
Dec 04 9am-5pm Ramada Hotel, Kelowna [T73000U_KA]
Dec 07 9am-5pm Sheraton Guildford, Surrey [T73000V_SU]
Dec 11 9am-5pm Van Conv Ctr West, Vancouver [T73000W_VA]
Dec 13 9am-5pm Van Conv Ctr West, Vancouver [T73000X_VA]
Dec 16 9am-5pm Van Conv Ctr West, Vancouver [T73000Y_VA]
Dec 17 9am-5pm Sutton Place, Vancouver [T73000A_VA]
Dec 23 9am-5pm Marriott Inner Harbour, Victoria [T73000B_VI]
Jan 06 9am-5pm Four Seasons, Vancouver [T73000C_VA]
Jan 26 9am-5pm Four Seasons, Vancouver [T73000D_VA]
Feb 22 9am-5pm PD Passport Valid 1 Passport Day 7 CPD Hours
Income Taxation of Portfolio Investments  
LEVEL: Intermediate  
Prerequisite: Familiarity with the existing tax rules in the ITA.  
Overview: Accountants are continually challenged by the creativity in the design and marketing of investment products and strategies. With the proliferation of new products, questions often arise regarding the taxation of the income and capital components. This half-day seminar will explain the application of income taxation to various investment products to assist in the preparation of personal and corporate income tax filings, the analysis of owning portfolio investments personally vs. corporately, and introduce the participant to after tax comparisons of alternative investment strategies.  
Who Should Attend: This seminar is designed for practitioners, investors and advisors who would like to enhance their knowledge of how the income from portfolio investments is taxed.  
Content:  
- Investment income taxation – general rules, including:  
  - Canadian source income from property  
  - Dividend tax credit  
  - Capital gains  
  - Foreign source income/tax credits/treaty exclusions  
  - Special treatment – charitable donations/other transfers  
- Deposit accounts: bank accounts; term deposits; GIC/GIA  
- Shares: common, preferred, flow through; reorganizations; puts and calls; and private company shares  
- Bonds: conventional (nominal); real return or inflation indexed; stripped; premium and discount bonds  
- Treasury bills: exchange traded funds (ETF); real estate investment trusts (REIT); specified investment flow through trusts (SIFT); limited partnership  
- Mutual funds: trust; corporate  
- Life insurance: accumulation policies; segregated funds  
- Registered funds: RRSP, RRIF, LIRA, LIF; TFSA; RESP; RDSP; and planning a retirement portfolio  
Seminar Leader: Chris Ireland, B.Comm, CPA, CA, TEP  
Dec 13 9am-12:30pm Van Conv Ctr West, Vancouver [T72090A_VA]  
Fee $220 PD Passport Valid 1/2 Passport Day 3.5 CPD Hours

Interest, Penalties and Taxpayer Relief  
LEVEL: Introductory  
Prerequisite: Familiarity with the existing tax rules in the ITA.  
Overview: The objectives of this seminar are to review the scheme of penalties and interest in the Act, the CRA’s current administration of those provisions, and the use of the Taxpayer Relief provisions to reduce the cost of penalties.  
Who Should Attend: General practitioners and members in industry who are responsible for tax reporting compliance.  
Content:  
- Interest: corporate taxes; individuals; instalments; GST/HST; payment and instalments; refund interest; and interest offset rules  
- Penalties – nature and type, including penalties on information returns; income tax; electronic filing; GST/HST; GST/HST wash transactions; gross negligence; payroll, source deductions, and non-resident withholdings; foreign reporting; and third party penalties  
- Refunds, payments, and filing, including when a refund can be issued; when a refund can be held; offsets; collections; and filing and proof of delivery  
- Taxpayer relief provisions including objectives; when they apply; how to apply; appealing a request; and due diligence defense  
- A brief overview of the voluntary disclosures requirements and examples  
Comments from Past Attendees: “Very well done.” “Real examples given, well-balanced topics and depth.” “Very good seminar.” “Good examples of real life situations.”  
Seminar Leader: Sandy Stedman, CPA, CA  
Nov 09 1:30pm-5pm Sutton Place, Vancouver [T72160A_VA]  
Fee $220 PD Passport Valid 1/2 Passport Day 3.5 CPD Hours
Legal Considerations in Personal Planning for Death and Incapacity

LEVEL Introductory

Prerequisite
None

Overview
Learn what comprises a comprehensive plan for death and incapacity in the context of the Wills Estates and Succession Act (WESA) and other recent legislative amendments. When planning for death, the Will is the foundation, however, other building blocks such as joint tenancy, beneficiary designation and trusts can be used to achieve various goals. Incapacity planning is also a key element of any personal plan. We will discuss the uses of powers of attorney, representation agreements, living wills, advance directives and trusts.

Who Should Attend
Practitioners who advise clients or are asked by clients about probate or estate planning.

Content
- overview of WESA and other recent legislative amendments
- planning for death, including wills, joint tenancy, beneficiary designation and trusts
- planning for incapacity
- powers of attorney
- representation agreements
- living wills
- advance directives
- trusts

Comments from Past Attendees
"Excellent. Left feeling like I could better help a few of my clients." "Would strongly recommend it!" "Topic was of interest and it was well presented." "Instructors were very knowledgeable and provided real world examples."

Seminar Leaders
Christine Muckle, JD
Genevieve Taylor, LL.B.

Life-Interest Trusts as Will Substitutes: The Use and Taxation of Alter Ego Trusts and Joint Spousal or Common-Law Partner Trusts

LEVEL Intermediate

Prerequisite
None

Overview
This half day seminar will review the requirements for, and applications of, spousal trusts, joint spousal and common-law partner trusts, alter ego trusts and protective trusts with special emphasis on why their use is so prevalent in British Columbia. In addition, the seminar will review how the rules relating to these special types of trusts intersect with other rules in the Income Tax Act focusing on potential problems and opportunities associated with using these special types of trusts.

Who Should Attend
Practitioners who advise clients on trust and estate planning issues.

Content
This seminar will review the requirements for, and applications of, spousal trusts, joint spousal and common-law partner trusts, alter ego trusts and protective trusts.

Examples will demonstrate the usefulness of these trusts in tax and estate planning and review some of the pitfalls associated with using these trusts.

The seminar will review the recent British Columbia case law on attempts to challenge the use of joint spousal and common-law partner trusts and alter ego trusts to avoid the Wills Variation Act.

Comments from Past Attendees
"Broad overview of opportunities and pitfalls." "Great simple analysis, top drawer speaker." "Very practical and technical." "The presenter is knowledgeable and is a great speaker."

Seminar Leader
David Thompson, B.Comm., LL.B., TEP

Feb 21 8am-10am Sutton Place, Vancouver [T71100A_VA]
Fee $130 PD Passport Valid 1/3 Passport Day 2 CPD Hours

Nov 23 9am-12:30pm Van Conv Ctr West, Vancouver [T72121B_VA]
Fee $220 PD Passport Valid 1/2 Passport Day 3.5 CPD Hours
Probate Fee Avoidance Planning
LEVEL Intermediate

Prerequisite
None

Overview
Even though British Columbia probate fees are relatively low, their existence seems to motivate clients to develop complex estate plans in order to avoid them. The seminar will review the fundamentals of when and why probate is required and what property is subject to the process. The seminar will also examine the various strategies that can be employed to avoid probate fees. Each probate fee avoidance strategy will be discussed in the context of achieving other common estate planning goals, so that the participants will learn how the individual strategies compliment or hinder the achievement of those other goals.

Who Should Attend
Those who advise clients or are asked by clients about probate and probate fee avoidance.

Content
• what is probate and when is it required
• what property is subject to probate fees
• probate fee rates
• planning opportunities to avoid probate fees
  - designation of beneficiaries
  - joint tenancy
  - inter vivos gifting
  - use of inter vivos trusts
  - multiple wills

Comments from Past Attendees
"Good overview of subject matter. " "Great seminar at just the right level. " "Very practical. " "Well planned lecture. " "A good summary of most issues impacting probate fees. " "The leader discussed practical applications, pros and cons, current updates, and handled questions well."

Seminar Leader
Genevieve Taylor, LL.B.

Purchase & Sale of a Business:
Income Tax & Related Issues
LEVEL Intermediate

Prerequisite
Familiarity with the ITA and in giving advice to clients.

Overview
This seminar will provide an understanding of income tax issues with respect to the purchase and sale of a business and will have comments on other issues in a purchase or sale of a business. At least six cases, including one on family succession, will be introduced for application of technical issues.

Who Should Attend
Practitioners, industry members, and those in privately owned businesses, who want technical and practical knowledge in taxation issues in the purchase and sale of a business.

Content
• how to start- commercial factors – EBITDA
• non-tax comments
• due diligence – income tax issues
• sale of shares- vendor and purchaser considerations, including the payment of dividends; planning for the eligible dividends; sale income; the use of holding companies; sale to employees
• sale of assets – vendor and purchaser considerations, including tax rates for capital gains, goodwill, business income; the sale of goodwill; and methods to defer the payment of tax
• other vendor and purchaser issues, including non-resident purchasers; provincial tax rates; transfers to other provinces; family succession; and insurance in company
• other considerations – interest expense and earnouts
• model case study
• the suggested new rules on private companies if they are published in time

Comments from Past Attendees
"Excellent course notes. " "Excellent coverage of important topics. " "Instructor knew the information very well and gave good examples. " "Great seminar."

Seminar Leader
Mary Power, CPA, CA

Nov 29 8am-10am Sutton Place, Vancouver [T71070A_VA] Fee $130 PD Passport Valid 1/3 Passport Day 2 CPD Hours
Nov 24 9am-5pm Van Conv Ctr West, Vancouver [T73210A_VA] Fee $425 PD Passport Valid 1 Passport Day 7 CPD Hours
Nov 28 9am-5pm Victoria Conf Ctr, Victoria [T73210B_VI] Fee $425 PD Passport Valid 1 Passport Day 7 CPD Hours
Restructuring Private Corporate Groups  
LEVEL Intermediate

**Prerequisite**
It would be beneficial for participants to attend *Tax Issues for Private Corporate Groups*, or have familiarity with the rules, before attending this seminar.

**Overview**
This seminar covers the income tax and GST/HST issues that arise as a result of transactions within a group of related privately held corporations. Issues covered will include sale of assets between group members, and reorganization and restructuring issues.

Participants will gain skills to be able to identify the intra-group tax issues in a privately held corporate group and develop solutions to achieve the business objectives in a tax effective manner.

**Who Should Attend**
Practitioners and managers involved in reorganizations or tax planning for groups of privately held companies.

**Content**
The course will be presented as two large case studies during which participants will:
• identify problems and issues with the current structure
• propose alternative structures to meet the business objective
• walk through the steps, basic documentation required, and issues involved in implementing the solution

**Comments from Past Attendees**
“Well presented. Course material was sufficiently detailed, easy to follow along.” “Useful, practical.” “Totally the best course for what I do.” “A great refresher, and a good binder for future reference.”

**Seminar Leaders**
Laird Branham, CPA, CA
Sandy Stedman, CPA, CA

Nov 09 9am-12:30pm Sutton Place, Vancouver [T72050B_VA] Fee $220 PD Passport Valid 1/2 Passport Day 3.5 CPD Hours

RIP: Estate and Testamentary Trust Returns  
LEVEL Intermediate

**Prerequisite**
Knowledge of personal tax, and some experience preparing T3 trust tax returns is recommended.

**Overview**
This seminar provides a review of the issues faced when preparing trust filings for deceased taxpayers. The focus is return preparation and related planning, including: review of relevant tax issues, engagement management, up-to-date source of relevant tax research, and reviewing and understanding CRA assessing practices. While the seminar will touch on some estate planning issues, these will generally focus on matters which can be addressed in the course of preparing these returns.

The seminar is divided between a review of technical tax issues related to such returns, and a series of practice case studies to illustrate the concepts and allow participants to apply their knowledge to practical filing situations commonly encountered in practice.

**Who Should Attend**
Practitioners who wish to expand their personal tax skills to encompass the trust returns commonly required for deceased taxpayers.

**Content**
• engagement management
• estate and testamentary trust review
• estate accounting
• GST/HST matters
• case studies

**Seminar Leaders to be drawn from**
Hayley Maschek
Pam Prior, CPA, CA, TEP
Andrew Taylor, CPA, CA

Nov 17 9am-5pm Van Conv Ctr West, Vancouver [T73211A_VA] Fee $425 PD Passport Valid 1 Passport Day 7 CPD Hours
RIP: Estate Planning to Minimize Tax Leakage
LEVEL Intermediate

Prerequisite
Experience in the area of domestic estate planning and a good understanding of the testamentary tax rules.

Overview
This seminar will provide a detailed review of important estate planning matters for practitioners who deal with the owner-managed client. This includes enhanced estate planning skills for the non-specialist practitioner, introduction of important tax and estate planning concepts, and useful tips and an up-to-date reference source. Participants will develop a working understanding of how to initiate and undertake effective estate planning for clients. An important area of the course is to maintain flexibility in the estate plan while the managing estate planning risk.

Who Should Attend
Practitioners who want to assist clients in identifying and addressing estate planning needs for the owner-manager or high net worth individual.

Content
- planning for deemed disposition at death
- post mortem planning
- planning and using trusts
- the use of life insurance in planning
- U.S. estate tax review
- case study

Seminar Leaders
Hayley Maschek
Pam Prior, CPA, CA, TEP

Nov 10 9am-5pm Four Seasons, Vancouver [T73110A_VA]
Nov 21 9am-5pm Sheraton Guildford, Surrey [T73110B_SU]
Nov 30 9am-5pm Ramada Hotel, Prince George [T73110C_PG]
Dec 07 9am-5pm Delta Ocean Pointe, Victoria [T73110D_VI]
Fee $425 PD Passport Valid 1 Passport Day 7 CPD Hours

RIP: Tax Compliance Matters Related to Terminal Filing Preparations
LEVEL Intermediate

Prerequisite
Knowledge of personal tax, and experience preparing T1 personal tax returns is recommended.

Overview
This full-day seminar will provide a detailed technical review of the numerous issues faced when preparing terminal (year-of-death) filings. The focus is return preparation and related planning as it relates to terminal filings, including: review of relevant tax issues, engagement management, up-to-date source of relevant tax research, and reviewing and understanding CRA assessing practices.

The seminar is divided between a review of technical tax issues related to such returns, and a series of practice case studies to illustrate the concepts and allow participants to apply their knowledge to practical filing situations commonly encountered in practice.

Who Should Attend
Practitioners who complete individual terminal filings and who are interested in understanding related planning strategies.

Content
- engagement management
- tax filings on death
- detailed compliance issues
- RRSP and deferred income plan rules
- general compliance areas
- estate accounting
- GST/HST matters
- case studies

Seminar Leaders
Hayley Maschek
Pam Prior, CPA, CA, TEP

Nov 14 9am-5pm Sutton Place, Vancouver [T73070A_VA]
Fee $425 PD Passport Valid 1 Passport Day 7 CPD Hours
Scientific Research & Experimental Development Tax Credits
LEVEL Intermediate

Prerequisite
Familiarity with the existing tax rules in the ITA.

Overview
The Scientific Research and Experimental Development Program (SR&ED) provides federal tax credits of over $3.6 billion a year to over 23,000 companies that have performed research and development in Canada. Most provinces also provide SR&ED tax credits, some of which exceed the federal incentives. The SR&ED program is administered by the CRA and requires a collaborative process between technology researchers, to define and document relevant activities, and financial/tax personnel, to claim the appropriate costs for investment tax credits. In recent years, many changes have been made to the program including rate changes, reduction of contract payments and the elimination of capital expenditures. Most claimants will find that their benefits will be reduced year over year. This course provides a comprehensive review of the legislation, policies and practicalities of preparing, filing and supporting SR&ED claims. This practical seminar will provide the information you need to advise your clients or your company and to guide them through the documentation and claim process as well as CRA reviews. The technical aspects of eligible work are covered at a high level, and financial/costing issues are covered in more detail.

Who Should Attend
Professionals with tax experience and who routinely work in tax (particularly in SR&ED) and R&D project managers, who wish to increase their knowledge about the inner workings of the SR&ED program.

Content
• overview of the "technology" eligibility criteria including examples
• introduction to documentation requirements to support claims
• discussions of the eligible costs and calculation of investment tax credits
• tips and traps in claim preparation
• updated summary of significant tax court decisions
• updated case study, including completion of all related federal and provincial tax forms

The course has been updated to include the changes to legislation and administrative policies up to July 15, 2017. It uses a case study format to work through preparation of a claim.

Note
CPA Canada offers a 22.5 hour blended learning course on Scientific Research & Experimental Development. See CPA Canada’s website for more information.

Seminar Leader
Joanne Hausch, CPA, CA

Section 85: Transfer of Property
LEVEL Intermediate

Prerequisite
Familiarity with the existing tax rules in the ITA.

Overview
Professional accountants are often engaged by their clients to assist with transactions designed to accomplish objectives such as creditor-proofing, estate planning, corporate restructuring etc. Section 85 of the Income Tax Act is often required so that the client’s objectives can be met in a tax-efficient manner. The provisions are complex and interact with a number of related and anti-avoidance provisions.

This full-day seminar covers selected tax aspects of the transfer of property to a corporation and the use of the section 85 rollover rules. Each module contains specific examples and case examples designed to help participants review relevant tax theory and focus on major tax planning issues that need to be considered, including key anti-avoidance provisions to avoid and filing requirements.

Who Should Attend
Accountants in public practice or industry who would like to identify situations where their organizations would require tax assistance will benefit from attending this seminar.

Participants in this course may also find the Corporate Reorganizations and Advanced Tax Planning Strategies courses beneficial.

Content
• purpose of Section 85
• conditions of application
• agreed amount - election and limits
• cost of consideration and other rules
• paid-up capital and legal characteristics of shares received
• anti-avoidance rules and other considerations
• election deadline and penalty

Comments from Past Attendees
“Good overview of broad concepts.” “Touched on matters pertinent to my practice.” “Great overview and update for my needs.” “Great overview on the technical side of Section 85s.” “The content of the course are applicable to my practice.”

Seminar Leader
Andrew Taylor, CPA, CA

Nov 24 9am-5pm Van Conv Ctr West, Vancouver [T73080A_VA]
Fee $425 PD Passport Valid 1 Passport Day 7 CPD Hours
Tax for Controllers
LEVEL Introductory

Prerequisite
Familiarity with the existing tax rules in the ITA.

Overview
Small, growing, and mid-sized companies face a broad array of income
tax, GST/HST and related compliance issues. The penalties or tax costs
of failing to meet these compliance requirements can be severe. This
course will help controllers of private companies stay current on a
broad array of income tax, GST/HST and related compliance issues.
It covers a range of topics at a general level with specific examples,
cases and practical problems. Detailed industry specific material is
not included in this course.

Who Should Attend
Anyone whose responsibilities include income tax, GST/HST and
related compliance and reporting issues.

Content
• human resources: payroll and withholdings; employee benefits;
  non-taxable benefits
• employee vs. independent contractor
• purchasing issues: limitations on deductions; GST/HST – get the
  ITC; and purchases from non-residents
• sales issues: GST/HST registration, reporting periods, and place
  of supply; bad debts; and export issues
• automobiles
• capital assets and real property: capital vs operating expense;
  purchase issues; CCA; GST/HST issues; change of use; and
  dispositions
• financing issues: expenses in respect to equity; interest and debt;
  lease vs. buy
• key items for CCPC income tax
• related group issues - the key income tax relationships:
  connected, related, associated, and affiliated; the key GST/HST
  relationships; closely connected and associated; shareholder
  agreements and related issues; specified corporate income and
  specified partnership income – contract issues; and domestic
  transfer pricing
• alternative structures – corporatons; partnerships; joint
  ventures; trusts
• payments, interest, and penalties
• filing requirements and due dates, and other reporting
  requirements including T4As and contractor reporting.

Ethics Content
This seminar qualifies for 0.5 hours of Ethics content.

Seminar Leader
Sandy Stedman, CPA, CA

Fee $785 PD Passport Valid 14 CPD Hours

Tax Issues for Private Corporate Groups
LEVEL Intermediate

Prerequisite
Familiarity with the ITA and GST/HST rules.

Overview
This seminar covers the unique taxation issues that apply to groups
of privately held companies and their shareholders. The seminar
includes a detailed review of the association rules, and a review of
the specified partnership income and specified corporate income
rules, basic considerations for inter-corporate dividends, trusts in
the corporate group and basic HST/GST issues. The courses uses a series
of mini cases reviewing the issues that arise during the growth of a
corporate group and the impact of the issues discussed in the materials.

This course does not have a detailed review of safe income.

Who Should Attend
Practitioners and managers involved with groups of privately held
companies.

Content
• basic related, associated, and affiliated rules
• the rules that modify the associate rules
• the results of associating corporations
• deemed association
• partnerships in the group – including the changes to the
  specified partnership income rules
• specified corporate income
• trusts in the group
• inter-corporate dividends and private corporations (does not
  include a detailed review of safe income)
• basic GST/HST issues including closely related and associated
  registrants
• other common issues

Comments from Past Attendees
“Found it all very practical and interesting.” “Good review of the
material with good examples provided by the instructor.” “The course
was extremely useful and a great overview of tax concepts.”

Seminar Leaders
Laird Branham, CPA, CA
Sandy Stedman, CPA, CA

Nov 02 9am-5pm  Marriott Inner Harbour, Victoria  [73041A_VI]
Nov 08 9am-5pm  Hyatt Regency, Vancouver  [73041B_VA]
Nov 15 9am-5pm  Coast Capri, Kelowna  [73041C KE]
Dec 07 9am-5pm  Sheraton Guildford, Surrey  [73041D_SU]
Fee $425  PD Passport Valid  7 CPD Hours
Tax Issues in Shutting Down a Corporation
LEVEL Intermediate

Prerequisite
Familiarity with the existing tax rules in the ITA.

Overview
This seminar will focus on the many tax issues that arise – both compliance and planning-related – when shutting down a corporation. It will primarily focus on private companies. Common traps and planning opportunities that arise when shutting down corporations will be discussed.

Although there will be coverage of the issues associated with the winding-up of smaller “mom and pop” type corporations that are ceasing operations, this only represents a small portion of the course coverage. The remainder of the course coverage will be more applicable to corporations within larger corporate groups. As an “Intermediate” level course, there will not be any coverage of T2-specific issues, such as where to check on the T2 that a company has been amalgamated or dissolved.

Who Should Attend
Members who are involved in winding up/dissolving corporations or who advise clients that are involved in winding up/dissolving corporations. Particular focus will be placed on private companies.

Content
• taxable wind-ups
• tax-deferred wind-ups
• tax-deferred amalgamations
• issues impacting shareholders of corporations being shut down
• issues relating to winding-up dividends
• tax issues relating to the disposition of shares and debts
• debt forgiveness issues that arise on winding up
• losses and ABILs
• clearance certificates, liability for tax debts, tax refunds, assessing a dissolved corporation
• PUC and ACB issues

Comments from Past Attendees
"Instructor was extremely knowledgeable and presented material very well." “Has real practical application.” “I liked the real life practical examples and things to watch out for.” “Excellent.”

Seminar Leader
Mike Stubbing, CPA, CA, CFP, TEP

Dec 01 9am-12:30pm Sutton Place, Vancouver [T72211A_VA]
Fee $220 PD Passport Valid 1/2 Passport Day 3.5 CPD Hours

Tax Issues in Starting a Business
LEVEL Introductory

Prerequisite
None

Overview
This seminar focuses on the many tax issues that arise – both compliance and planning related – when starting a business. This seminar is primarily focused on private companies. It does not touch on provincial-specific regulations or non-tax issues that are relevant to private companies (workers compensation rules, specific registration requirements, etc). Common traps and planning opportunities are discussed. This is a beginner-level course.

Who Should Attend
General practitioners who are involved in advising clients that are starting new businesses. Particular focus will be placed on fairly straightforward private company situations.

Content
• proprietorships, partnerships, and corporations
• structuring for tax efficiency
• structuring for investors
• structuring decisions to preserve access to losses
• planning opportunities
• employee issues

Comments from Past Attendees
"The material handed out was excellent.” “Good examples.” “Excellent seminar, excellent instructor.” “Informative and interesting.” “Seminar was of good practical value.”

Seminar Leader
Mike Stubbing, CPA, CA, CFP, TEP

Nov 30 1:30pm-5pm Sutton Place, Vancouver [T72210B_VA]
Fee $220 PD Passport Valid 1/2 Passport Day 3.5 CPD Hours
**Tax Planning for Private Enterprises on Business Succession**  
**LEVEL** Intermediate to Advanced

**Prerequisite**  
Familiarity with the existing tax rules in the ITA.

**Overview**  
Business succession involving closely-held private enterprises can range from an intra-family estate plan to an arm’s length sale of shares. This seminar will provide practical knowledge of the principal considerations in formulating and implementing business succession plans. The focus will be on income tax considerations, although key non-tax issues will also be identified. Salient tax considerations will be discussed and illustrated by reference to examples. Related planning points will also be covered.

**Who Should Attend**  
Accountants in public practice with clients who are owner-managers of private corporations, as well as in-house professionals of private enterprises, especially those facing succession issues.

**Content**  
- identifying business succession alternatives
- principal tax and non-tax considerations
- estate freezes, wasting estate freezes, post-mortem strategies
- valuation issues and price adjustment clauses
- utilizing family trusts
- avoiding attribution issues
- alter ego trusts and joint spousal trusts
- intra-family succession
- section 84.1 re-characterization rules
- arm’s length sales of shares
- pre-sale purifications
- utilizing the lifetime capital gains exemptions
- capital gains deferral rules
- divisive reorganizations and section 55 (incl. recently proposed amendments)
- using life insurance to fund taxes on death
- non-competition payments and related tax issues
- financing considerations
- case study illustrating alternative tax consequences
- tax checklist

**Seminar Leaders**  
Asif Abdulla, JD  
Shawn Tryon, LL.B.

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**Tax Returns: Corporate**  
**LEVEL** Introductory

**Prerequisite**  
Experience with corporate tax is beneficial, but not essential.

**Overview**  
This seminar provides participants with a broad overview of the income tax provisions which can impact taxpayers filing their corporate tax returns. It provides a comprehensive review of income tax compliance and planning issues relevant to the preparation of Canadian corporate income tax returns. Participants will gain an overall understanding of tax compliance and planning issues, enhancing their ability to identify and address planning opportunities which arise in the preparation of income tax returns.

**Who Should Attend**  
Practitioners with regular involvement in this area who want a refresher and update, and those who have been away from corporate taxes for some time and want an understanding of the issues which may arise in corporate tax return preparation.

**Content**  
- net income for tax purposes
- asset transactions
- taxable income
- corporate relationships
- federal corporate taxes
- administration and disclosure
- provincial issues

**Note**  
This seminar deals in conceptual issues, and does not deal directly with the layout of the corporate tax return or the forms and schedules utilized in preparation of such returns nor does it focus on tax planning issues.

The seminar is structured to focus on issues encountered in general tax practice. More complex and specialized areas, such as taxation of non-residents, scientific research & experimental development, corporate restructurings and reorganizations and specialized sectors such as insurance, banking and resource sectors, are beyond the focus of this seminar.

**Seminar Leaders to be drawn from**  
Denise Lammi, CPA, CA  
Richard Myers, CPA, CA  
Andrew Taylor, CPA, CA
TAXATION

Tax Returns: Personal
LEVEL Introductory

Prerequisite
Experience with personal tax returns is beneficial, but not essential.

Overview
This seminar provides participants with a broad overview of the income tax provisions which can impact taxpayers filing their personal tax returns. Participants will gain an overall understanding of tax compliance and planning issues, enhancing their ability to identify and address planning opportunities which arise in the preparation of personal income tax returns. The seminar materials provide greater depth of discussion, particularly in more complex areas or areas less frequently encountered in practice, and are intended as an ongoing reference source for participants.

Who Should Attend
Practitioners with regular involvement in this area and want a refresher and update, and those who have been away from personal taxes for some time who want an understanding of the issues which may arise in personal tax return preparation.

Content
• liability for tax
• employment income
• retirement income
• income from property
• income from business
• capital gains and losses
• other income and deductions
• personal tax credits
• computation of tax
• administration and disclosure
• provincial issues

Note
This seminar deals in conceptual issues, and does not deal directly with the layout of the tax return or the forms and schedules utilized in preparation of such returns.

The course is structured to focus on issues encountered in general personal tax practice. More complex and specialized areas, such as taxation of non-residents, taxation of deceased persons and specialized sectors such as insurance and the resource sector, are beyond the focus of this seminar.

Seminar Leader to be drawn from
Richard Myers, CPA, CA
Mark Ostry, CPA, CGA

Nov 23 9am-5pm Van Conv Ctr West, Vancouver [T73260A_VA]
Feb 09 9am-5pm Sutton Place, Vancouver [T73260B_VA]
Fee $425 PD Passport Valid 1 Passport Day 7 CPD Hours

Taxation of Domestic Trusts: Advanced
LEVEL Advanced

Prerequisite
Taxation of Domestic Family Trusts: Basic or equivalent knowledge.

Overview
This seminar focuses on the use of inter vivos trusts, testamentary trusts and estates with an emphasis on planning concepts and strategies. Participants will gain an enhanced knowledge concerning the use and planning aspects pertaining to trusts as well as the potential tax problems associated with the use of trusts in business structures.

Who Should Attend
Practitioners who are familiar with the taxation of domestic trusts, who wish to expand their knowledge of the use of trusts in tax planning and to be aware of the pitfalls to be avoided. Practitioners wishing to obtain a comprehensive knowledge should consider taking both the Basic and Advanced courses.

Content
• non-tax reasons for using trusts
• tax planning considerations including income splitting and capital gains splitting
• tax traps including the tax on split income (“kiddie tax”), the reversionary trust rules and the income attribution rules
• problems created in using trusts
• 21-year deemed disposition rule and various strategies in dealing with the rule
• other planning considerations
• audit proofing your client

Detailed practical examples will be given of using trusts in the following circumstances
• using trusts to protect assets and for anonymity
• holding cottages and other residential property in a trust and the interplay with the principal residence exemption
• using alter ego, joint spousal and self-benefit trusts in creditor-proofing, marriage and in estate planning
• trusts in estate planning, including establishing and managing a spousal trust and a joint spousal trust
• post-mortem tax planning for the estate including the Executor’s Year strategy, the use of life insurance and the ”50% solution” and the pipeline strategy
• special use trusts, including charitable remainder trusts, insurance trusts and lifetime benefit trusts

Seminar Leader
Shane Brown, LL.B.

Nov 10 9am-5pm Four Seasons, Vancouver [T73230A_VA]
Fee $425 PD Passport Valid 1 Passport Day 7 CPD Hours
TAXATION

Taxation of Domestic Trusts: Basic
LEVEL Introductory to Intermediate

Prerequisite
Familiarity with the existing tax rules in the ITA.

Overview
This seminar will focus on the basic rules governing the creation and management of a trust, including the relationship between the parties, the design of a trust, the obligations imposed on the trustees, the types of trust, and the taxation of trusts and their beneficiaries. The seminar will cover specifically the tax treatment of the contribution of property to a trust, the distribution of property from a trust and the application of the 21-year rule, in reference to the various types of trust the Income Tax Act recognizes. Practical uses of trusts in basic tax-planning arrangements will be covered, and the major pitfalls to be taken into account will be addressed. A summary of the circumstances in which a trust must file a return, the timing of the filing, installment requirements and amending returns will also be covered. Changes to the taxation of testamentary trusts which take effect from 2017 will be covered with each topic to which they relate.

Who Should Attend
Practitioners who would like a working knowledge of the nature of a trust and the constraints imposed by law on the use of a trust, the various types of trusts, the rules relating to the taxation of trusts and their beneficiaries and the practical uses of trusts. Practitioners wishing to obtain a comprehensive knowledge should consider taking both the Basic and Advanced courses.

Content
• identifying the circumstances where a trust can be of use in planning both from a tax and a general business perspective
• various types of trusts and how trusts and beneficiaries are taxed
• how to settle an inter vivos trust and the issues to address in identifying the settlor
• obligations imposed on trustees and issued to considered in identifying and replacing trustees
• distinguishing a trust from an estate and the practical implications of the distinction, including a summary of the income tax filings available with respect to a deceased taxpayer
• detailed examples to illustrate the practical use of trusts in basic planning transactions, including income splitting, maximizing the capital gains deduction and deferring taxes that might arise on death
• summary of the taxation of an estate, a testamentary trust, an inter vivos trust and the beneficiaries of such trusts
• attribution rules as they apply generally and to trusts
• reversionary trust rule and how to plan around it
• review of the basic rules governing the filing of the T3 return

Seminar Leader to be drawn from
Shane Brown, LL.B.
Andrew Taylor, CPA, CA

Taxation of Employee Benefits
LEVEL Intermediate

Prerequisite
Basic understanding of personal and corporate taxation.

Overview
This half-day seminar provides a review of the income tax implications of benefits conferred on employees by their employers, including both owner-managers and employees who are unrelated to the employer. Participants will gain an understanding of the income tax issues which arise from various types of benefits, assisting them in assessing the tax-effectiveness of various benefit plans and choices of employment benefits. Participants will also enhance their ability to advise on tax-effective employee remuneration strategies using benefit plans.

Who Should Attend
Employers, and their advisors, who want an understanding of the taxation of employee benefits in general, and specific benefits which are either common in practice, or have unusual income tax complexities.

Content
• income tax treatment of benefits
• employee allowances and automobile benefits
• goods and services tax
• loans
• planning opportunities for key employees
• other employee benefits

Comments from Past Attendees
“Good, practical examples. Good reference material.” “Good insight into taxable benefits and pitfalls.” “An informative and timely seminar.” “Relevant information discussed with good practical examples.”

Seminar Leader
Mark Ostry, CPA, CGA

Nov 10 9am-12:30pm Van Island Conf Ctr, Nanaimo [T72120A_NA]
Feb 08 1:30pm-5pm Sutton Place, Vancouver [T72120B_VA]
Fee $220 PD Passport Valid 1/2 Passport Day 3.5 CPD Hours
To Be or Not to Be: The Executor – Powers, Obligations and Liabilities
LEVEL: Introductory to Intermediate
Prerequisite
None
Overview
Acting as an Executor can be financially rewarding for the member or the member’s client who agrees to act. However, the job can be onerous and fraught with complexity, acrimony and personal risk. The goal of this seminar is to provide you with sufficient knowledge so that you can make an informed decision or assist your clients in making informed decisions as to whether you or your clients should take on the Executor’s role. You will learn and examine the stages of estate administration from date of death through to distribution, final accounting and release.

Who Should Attend
Members who are thinking of taking on the role of Executor, or who have clients who are thinking of acting as Executors.

Content
• the probate process
• dealing with creditors and claims
• safeguarding estate assets
• managing beneficiary expectations
• compensation
• accounting and release

Comments from Past Attendees
“Thorough and informative. Enjoyed the course!” “Excellent speakers – both very engaging.” “Excellent overview of the topic if you have never acted as an executor.” “Well presented and useful reference material.”

Seminar Leaders
Christine Muckle, JD
Genevieve Taylor, LL.B.

Nov 09 8am-10am Sutton Place, Vancouver [T71110A_VA]
Fee $130 PD Passport Valid 1/3 Passport Day 2 CPD Hours

U.S. Real Estate: Personal Investment - Canadian & US Tax Implications
LEVEL: Intermediate to Advanced
Prerequisite
Familiarity with the Canadian ITA.
Overview
The objective of the course is to develop a basic understanding of the Canadian and U.S. tax issues that arise on the acquisition, ownership, and disposition of U.S. real estate by individuals resident in Canada. The course also aims to create a basic understanding of the compliance requirements and the current planning opportunities available to minimize Canadian and U.S. taxes with respect to ownership of U.S. real estate. The implications on death will also be covered.

Who Should Attend
Individuals interested in investing in U.S. real estate, advisors to individuals investing in U.S. real estate, and owners of U.S. real estate.

Content
The course will cover Canadian and U.S. (federal and state) tax issues that should be considered when individuals invest in U.S. real estate – whether for personal use, or for rental, or for both rental and personal use. The applicable tax filing requirements are included along with elections that need to be filed. Topics include
• various structures for ownership (e.g., individual, partnership, trust, LLC, etc)
• relevant Canadian and U.S. tax rules
• Canadian and U.S. filing requirements
• U.S. state taxation
• disposition of U.S. real estate
• U.S. estate and gift tax
• tax rates
• various U.S. tax forms and elections

Numerical examples are included in the materials. Personal experience and discussion is part of the course.

Comments from Past Attendees
“The seminar exceeded my expectations, and the material will be very useful going forward.” “An exceptionally knowledgeable presenter.” “An excellent overview of the issues presented in a clear and concise manner.”

Seminar Leaders
Ryan Gill, CPA, CA, CPA (New Hampshire)
Benita Loughlin, CPA, CA

Nov 30 9am-5pm Sutton Place, Vancouver [T73322A_VA]
Fee $425 PD Passport Valid 1 Passport Day 7 CPD Hours
U.S. Taxation of Individuals: Basic
LEVEL Introductory

Prerequisite
None

Overview
This seminar will provide a basic understanding of U.S. individual income taxation and Federal filing requirements of U.S. citizens, residents and non-resident aliens of the U.S. There will be a discussion on the U.S. taxation of U.S. real estate and will include the disposition of U.S. real estate for non-resident aliens. Case studies and discussions will be used to illustrate concepts under each topic. State tax issues and real estate acquisition strategies will NOT be covered.

Who Should Attend
Practitioners who want to gain a basic understanding of U.S. taxation for individuals and to assist with the preparation of basic U.S. tax returns.

Content
• tax classification and residency status tests
• taxation of resident and non-resident aliens
• general discussion of the Canada – U.S. income tax convention
• transactions involving the purchase and sale of U.S. real estate by non-residents
• gambling winnings and losses
• case studies

Topics such as voluntary disclosure for delinquent filers, foreign earned income exclusions, foreign tax credits, alternative minimum tax, principal residence, foreign pension plan, expatriation tax, estate & gift taxes, cross border taxation of U.S. entities are covered in separate courses - U.S. Taxation of U.S. Citizens Living Abroad.

Comments from Past Attendees
“A very useful course.” “Great information package.” “Very relevant information.” “I enjoyed the case studies.” “It was a great seminar.”

Seminar Leaders
John Demetri, CPA, CA, CPA (Illinois)
Shan Hofer, CPA, CA, CPA (Illinois)

Oct 26
9am-5pm
PD Passport Valid
1 Passport Day
[T73330A_VA]
7 CPD Hours

U.S. Taxation of U.S. Citizens Living Abroad
LEVEL Intermediate

Prerequisite
General understanding of the interrelationship of U.S. tax with Canadian tax. Canadian tax principles are not the focus of the seminar.

Overview
U.S. citizens and resident aliens of the U.S. are taxed on their worldwide income. They must continue to file U.S. tax returns referring to the same tax rules as if they were still residing in the U.S., although they may be able to exclude from U.S. taxation all or parts of their foreign earned income. This seminar will provide a general understanding of U.S. taxation of U.S. citizens and resident aliens abroad, exposure for failure to file U.S. tax and information returns, options for delinquent filers, and changes to U.S. income taxes from 2013 onwards. The seminar material will include useful references including sample treaty disclosure statements and detailed case studies.

Who Should Attend
Practitioners who advise U.S. citizens and resident aliens living abroad.

Content
This seminar will help you determine what income can be excluded from U.S. taxation, income eligible for foreign tax credits, and identify reporting and filing requirements for U.S. citizens abroad. Case studies will be used to illustrate concepts. Topics include
• filing requirements, FBAR, voluntary disclosure process and current developments
• sourcing of income
• foreign exclusions
• moving and travel expenses
• foreign tax credits
• U.S. tax implications on sale of a principal residence
• U.S. taxation of RRSPs and RESPs for U.S. citizens living in Canada
• Canadian taxation of 401(k) plans, traditional IRAs and Roth IRAs
• U.S. expatriation tax rules

Comments from Past Attendees
“This is one of the nest courses I have taken – gave me lots of think about and good reference material.” “Very good seminar and materials.” “Excellent seminar.” “I took home valuable information.”

Seminar Leaders
Aaron Dawes, CPA, CGA, EA
Lilian Zheng, CPA, CA, CPA (New Hampshire)

Nov 09
9am-5pm
Four Seasons, Vancouver
[T73340A_VA]
7 CPD Hours

Fee $425
PD Passport Valid
1 Passport Day
**Wealth Management**

**Enough Bull: How to Retire Well Without the Stock Market** (132)

**Introduction to Portfolio and Investment Management Techniques** (133)

**Money, Marriage and Mayhem** (133)

**Money, Mindfulness and Power** (134)

**Risk on a One Lane Highway** (134)

**Smoke & Mirrors: Financial Myths that will Ruin Your Retirement Dreams** (135)

**The Procrastinator’s Guide to Retirement** (135)

**The Psychology of Money** (136)

**The Simplest Personal Strategy Ever: Cash Cows, Pigs and Jackpots** (136)

**Unveiling the Retirement Myth** (137)

**Wealth Management Tools and Practices** (137)

**Conference**

**PD Nexus: Financial Planning Insights** (140)

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### Enough Bull: How to Retire Well Without the Stock Market

**LEVEL: Introductory**

**Prerequisite**

None

**Special Note**

This is a hands-on workshop. Though not mandatory, you are encouraged to bring a laptop to work along during the program on spreadsheets including the “Money Maximizer” to maximize your family’s after-tax cash flow.

**Overview**

This seminar will explore a safe, easy-to-implement retirement strategy that doesn’t involve trying to find an extraordinary financial advisor to make it work. The stock market crash of 2008 illustrated that traditional retirement planning advice is way too risky. Trusting the stock market is like gambling with your family’s future. But how do you plan for retirement without the possibility of losing up to 50% of your investments in a short period of time? The simple truth is that it is possible to retire well using guaranteed, safe fixed-income products like GICs that can never decline in value combined with government defined benefit pension plans including the CPP and OAS. Join author David Trahair, CPA, CA as he gives you the non-traditional view to money management that your investment advisor may not. Participants will receive will get a copy of David Trahair’s book *Enough Bull*.

**Who Should Attend**

Those interested in helping their friends, family and clients to retire well without having to take risks.

**Content**

- the laddered GIC strategy - explore how to use a strategy of rolling over shorter term GICs to five-year GICs to maximize your retirement savings with zero risk; look at historical returns using this strategy versus the stock market
- the Canada Pension Plan - when to elect to start receiving the CPP pension (as early as age 60) and the new rules
- can anything beat an RRSP - compare equity investing inside RRSPs versus outside in a regular investment account, TFSAs, rental properties and retaining earnings in a corporation.
- getting out of mutual funds – mutual funds are too expensive in Canada today; getting out as quickly and painlessly as possible
- the “tax turbo-charged RRSP” - work through the numbers to compare the traditional advice to invest in RRSPs each and every year, to waiting until later in life, when all debt is gone

**Seminar Leader**

David Trahair, CPA, CA

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<td>PD Passport Valid</td>
<td>1 Passport Day</td>
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Introduction to Portfolio and Investment Management Techniques
LEVEL Introductory to Intermediate

Prerequisite
None

Overview
This half-day seminar will provide you with an understanding of basic and intermediate portfolio and investment management techniques for use in your own investment portfolio.

Participants will learn the building blocks of portfolio and investment management used by professional advisors. You will come away with a greater understanding of how to manage your own portfolio, and/or a better benchmark against which to gauge your personal financial advisor.

Who Should Attend
Anyone interested in learning basic and intermediate techniques for managing their personal investment portfolio. This session is aimed at those new to the investment management area.

Content
- investment policy statements
- asset mix and knowing when and how to rebalance
- risk and reward
- active versus passive investment management
- investment analysis and selection
  - equities – fundamental and technical analysis, valuation
  - bonds – basic terms, the yield curve, credit, liquidity, valuation
  - managed products – mutual funds, ETFs, hedge funds, flow through funds
- performance reporting and portfolio reviews
- best practices for investors

Comments from Past Attendees
“A very useful seminar for anybody who has personal investments!”
“A good introduction course to investment practice.” “Excellent, enjoyed it.”

Seminar Leader to be drawn from
Cody McMullin, CPA, CA, CFA
Trevor O’Reilly, CFA

Money, Marriage and Mayhem
LEVEL Introductory

Prerequisite
None

Overview
In a new social reality our clients are not just divorcing but re-partnering again – often with the same disastrous financial (and emotional) results! The first line of defense in any scenario where the downside risk is a 50% reduction in wealth is to manage that risk. And yet, few couples will engage in the discussion and legal options available to avoid potentially disastrous outcomes. As aging couples re-partner, common misunderstandings are compounded by unequal net worth, children, step children, and estate planning considerations. Assumptions that today’s couples are going to stay together forever is simply not supported in reality. Spousal relationships, co-habitation and marriage need to be examined in light of their financial and legal implications and not just within the romantic models we idealize and hope for.

Who Should Attend
Anyone who has clients who have changed marital status, or are contemplating partnering, or are in the midst of a change themselves.

Content
- legal structures of spousal partnerships
- factors of consideration
- structures for communication
- conflict resolution continuum and options available
- concepts of romantic relationships, social assumptions and misunderstandings
- the role of the financial professional in overseeing and supporting healthy and protective behaviours with their re-partnering clients

Seminar Leader
Tracy Theemes, MA, CFP, CFP, FCSI, FDS

133
Risk on a One Lane Highway
LEVEL Introductory

Prerequisite
None

Overview
Professionals often view risk and portfolio management with a one-eyed lens. Taxation, legal, accounting and personal financial planning objectives dictate methodologies and strategies that are often in conflict and too narrowly defined! There are so many different ideas about risk and volatility as well as portfolio construction theories that one must keep up within a vastly changing landscape and market. The risks and rewards from each of these viewpoints, along with an overview of the new portfolio construction theories will be outlined. Investment strategy is a constantly changing field based on markets, demographics and new empirical evidence.

Who Should Attend
Anyone who has not updated their investment portfolio construction knowledge base in the last 3 years as well as those overseeing wealth management professionals for clients and for their own portfolios.

Content
• definitions: risk, reward, portfolio optimization and construction theories, volatility and variance
• colloquial versus professional perspectives about risk
• miscommunications amongst professionals about quantifying risk
• efficiency, diversification and other risk management strategies
• lenses and biases of various financial professionals
• common investment mistakes about risk-taking

Seminar Leaders
Kamal Basra, B.Sc., CFP, FMA, FCSI
Tracy Theemes, MA, CFP, FCSI, FDS

Mar 20 9am-12:30pm Sutton Place, Vancouver [A72304A_VA]
Fee $220 PD Passport Valid 1/2 Passport Day 3.5 CPD Hours

Money, Mindfulness and Power
LEVEL Introductory

Prerequisite
None

Overview
Money is the currency of modern life. Yet for many, money is also a source of anxiety, irritation or conversely, sits in unacknowledged darkness casting a shadow onto our communication, our relationships and how well or poorly our life functions. For professionals working in the front lines of wealth management and finance, our leadership and mentorship is called for. Yet unexamined, we may ourselves be contributing to many of the falsehoods and misunderstandings that govern our own and our client’s financial behaviours. Mindfulness is more than a stress reduction practice or spiritual undertaking. It is the ability to notice and discipline our responses to stimuli that can lead to more positive outcomes. Additionally, rarely is money approached in the professional domain as anything other than numeric values. But in reality it is energy and energy is power. Bringing these thorny ideas into discussion and acknowledging their presence in context of our professional and personal lives can be difficult. Avoidance often becomes our preferred stance.

Who Should Attend
Professionals who sense that money and finance are more than just numbers and are curious about their own financial behaviour and those of their clients.

Content
• definition of mindfulness, wealth and power
• mindfulness practices for the advisor
• identifying and discussion of the connection between cash flow and mindfulness
• connection between ego and financial behaviour
• self-regulation strategies
• developing a money credo

Seminar Leader
Tracy Theemes, MA, CFP, FCSI, FDS

Mar 13 9am-12:30pm Sutton Place, Vancouver [A72304A_VA]
Fee $220 PD Passport Valid 1/2 Passport Day 3.5 CPD Hours
Smoke & Mirrors: Financial Myths that will Ruin Your Retirement Dreams
LEVEL Introductory

Prerequisite
None

Special Note
This is a hands-on workshop. Though not mandatory, you are encouraged to bring a laptop to work along during the program on spreadsheets to calculate how much you’ll need to retire and how well your investments have been doing.

Overview
This seminar will clearly explain, illustrate and analyze the issue of how much you will need to retire, what you’ll need to save to reach your goal and other issues related to retirement planning. How much will a family need to retire comfortably? Are RRSPs the best answer? Can the stock market be trusted? The standard answers from the “experts” include: start an RRSP early and maximize your contributions, use the stock market and mutual funds for the best returns, put faith in a financial advisor. But what if those answers are wrong? This seminar will cut through the sales pitches and get to the simple truth. Attendees will receive a copy of David Trahair’s book Smoke and Mirrors.

Who Should Attend
Anyone who is interested in what they need to do to retire well.

Content
• if I had $1,000,000 I could retire – find out why you might be fine with much less
  - look into the rule of thumb that you will need 70% of your pre-retirement income to retire well
• RRSPs are the holy grail of retirement – find out why they most definitely are not
  - explore a simple alternate strategy that is guaranteed, has no risk, and eliminates fees
  - don’t worry about your investments, you’ll be fine in the long run
  - why nothing could be further from the truth
  - look at why you may not be making the 8-10% a year they often talk about; calculate your own investment personal rate of return
• we have met the enemy, and he is the tax collector
  - interested in reducing your taxes, but find out why tax shelters may be sabotaging your personal finances in the process
• secure your financial future – buy life insurance
  - who needs it, who doesn’t, the perils of whole and universal life, and how to get it cheap

Seminar Leader
David Trahair, CPA, CA

The Procrastinator’s Guide to Retirement
LEVEL Introductory

Prerequisite
None

Special Note
This is a hands-on workshop. Though not mandatory, you are encouraged to bring a laptop to work along during the program on spreadsheets including the “The Procrastinator’s Number Cruncher” spreadsheet that will calculate your income, taxes, spending and investments to maximize the money available for your retirement.

Overview
Let’s face it, planning and saving for retirement is not easy. We are told that the earlier we start the better and that the “magic of compounding” will make our dreams come true if we simply trust the stock market and our investment advisor. But for most people it’s simply not possible. In our twenties, thirties and forties we are busy paying for our housing, cars, kids and all the other costs that come with raising a family. We become procrastinators when it comes to saving for retirement. But there is hope. This course will take you step-by-step though planning and saving for retirement starting in your fifties. Attendees will receive a copy of David Trahair’s book The Procrastinator’s Guide to Retirement.

Who Should Attend
Anyone approaching retirement who wants to ensure it is comfortable and stress-free.

Content
• tracking your spending - do it easily, automatically and for free
• the Number Cruncher - receive and work with this easy-to-use Excel spreadsheet to optimize the use of excess cash and maximize your retirement income
• your pre- and post-retirement investment strategy
• your CPP and OAS pensions - what age to start, how to calculate how much you’ll get, the new OAS rules, optimize both plans
• RRIF versus annuity - how they work, advantages and disadvantages, a suggested strategy and current annuity rates
• old age healthcare planning - what the government covers and what they don’t, long-term care facility options
• how to attack debt - snowball vs. avalanche debt reduction
• your home as a source of funds
• car lease versus buy
• inheritance – a simple checklist, what to do with funds received
• divorce - the basics from a financial perspective
• your company pension plan - how to decipher
• your credit card strategy

Seminar Leader
David Trahair, CPA, CA
The Psychology of Money
LEVEL Introductory

Prerequisite
None

Overview
The idea that humans are rational and that their relationship with money is a clear line between logic and action has been soundly disputed by empirical research. Gender, socio-cultural conditioning, epigenetics, family system theory combined with the dynamics of a changing world converge to create psychological chaos in the world of financial planning and investment management. As professionals it is imperative that we have tools to understand the often conflicting behaviours of our clients, and ourselves! When it comes to money, nothing is really as it seems. Financial planning and traditional views of investment management need to be reviewed in a more sophisticated psychological context if we are to appropriately advise and protect our clients—and ourselves—against irrational and self-sabotaging financial decision making and behaviour.

This seminar will discuss gender and socio-cultural variables in financial planning and decision making, and enable participants to develop an architecture for decision-making processes. At the end of this seminar, participants should be able to recognize patterns and situations where conflicting objectives and behaviours may lead to unsuitable outcomes, have strategies of recognition and intervention that may assist in working with clients, and understand their own biases in working with clients and their finances.

Who Should Attend
Anyone who has money or counsels those who have money.

Content
• 10 principles of personal financial behaviour
• 5 wealth myths de-bunked
• 3 factors that affect our relationship with money
• Description of the basic principles of behavioural finance and their consequences in the field of personal financial planning
• The adult developmental continuum and its role in planning

Seminar Leader
Tracy Theemes, MA, CFP, FCSI, FDS
Feb 13 9am-12:30pm Sutton Place, Vancouver [A7303A_VA] Fee $220 PD Passport Valid 1/2 Passport Day 3.5 CPD Hours

The Simplest Personal Strategy Ever: Cash Cows, Pigs and Jackpots
LEVEL Introductory

Prerequisite
None

Special Note
This is a hands-on workshop. Though not mandatory, you are encouraged to bring a laptop to work along during the program on spreadsheets including the "Cash Cow Decision Maker" designed to allow you to play with alternatives to maximize your family’s cash flow. You’ll also get the "House Rent vs. Buy Analyzer" spreadsheet.

Overview
The truth when it comes to personal finances is simple: people’s quest to secure a comfortable retirement often ends up making them poor and others rich. The old way to get wealthy was to build up assets and net worth, using real estate, stocks and funds, since that is the “true” measure of wealth, with debt often used to do the building. But that strategy is deeply flawed and is sending many people to the poorhouse. It ignores the one basic principle that overrides any wealth building strategy that anyone who is truly rich knows: what we should really be focused on is not getting rich but plain old CASH FLOW. This seminar will explore the concept of ensuring cash flow when it comes to personal finances rather than trying to build wealth as measured by net worth. Attendees will receive David Trahair’s book Cash Cows, Pigs and Jackpots.

Who Should Attend
Anyone interested in helping their clients focus on what really matters—not building wealth, but ensuring cash flow.

Content
• the cash cow strategy - how to employ this simple strategy in your daily life
• your biggest cash cow - how to identify your greatest source(s) of cash and make sure they keep on giving
• the cash cow decision maker - a spreadsheet designed to allow you to play with alternatives to maximize your family cash flow over your life
• the house rent versus buy analyzer - a spreadsheet to determine whether buying or renting is the better option
• the condominium conundrum - what is involved in purchasing a condo either as a first home or rental property
• inflation - how they measure the CPI index.
• Canada Pension Plan - review of the rocky history
• Old Age Security - review of the proposed changes
• cash flow for life - converting RRSPs to annuities vs. RRIFs
• the inheritance jackpot - how to make sure inter-generational money does not “slip through the cracks”

Seminar Leader
David Trahair, CPA, CA
Oct 27 9am-5pm Executive Plaza, Coquitlam [A73082D_CO] Fee $425 PD Passport Valid 1 Passport Day 7 CPD Hours
Nov 17 9am-5pm Four Seasons, Vancouver [A73082E_VA] Fee $425 PD Passport Valid 1 Passport Day 7 CPD Hours
Mar 15 9am-5pm Sheraton Guildford, Surrey [A73082F_SU] Fee $425 PD Passport Valid 1 Passport Day 7 CPD Hours
Unveiling the Retirement Myth
LEVEL Intermediate

Prerequisite
None

Overview
As baby boomers approach retirement, we need to separate the ‘myth’ from the ‘fact.’ This full-day seminar will provide a review of how to plan for retirement based on market history since 1900. Retirement issues such as risks of investing, sustainability of lifelong income, optimum asset mix, inflation protection and potential conflict of interest with your financial advisor will be covered. You will gain a better understanding of your clients’ retirement concerns and the proper tools necessary to give them crystal-clear answers about their retirement.

Who Should Attend
Members in industry and practitioners who are close to retirement, or those who advise on retirement planning.

Content
• basics of financial planning
• review and description of the pitfalls of current retirement planning methods
• market history and retirement, how luck effects your retirement, time value of fluctuations
• four warning signals of diminishing luck
• optimum asset allocation and rebalancing, different asset allocation strategies
• common myths and pitfalls perpetuated by the financial industry
• how much income is enough, how do you determine if savings are insufficient, sufficient or abundant
• designing the ‘perfect mix’ of annuities and investments, the zone strategy
• asset selection: when to choose what, typical low-cost portfolios
• how to use the market-history-based retirement calculator
• design your own case study: are you in the Green or Red Zone?

Comments from Past Attendees
“Excellent portrayal of investment risks & uncertainties.” “Fresh take on planning for retirement – considerations not expressed by my own financial advisor.” “Excellent seminar, exceeded my expectations.” “Good general overview of retirement planning and variable to consider.” “Excellent presenter – knowledgeable, keen and humorous.”

Seminar Leader
Jim Otar, CFP, BASC, MENG

Wealth Management Tools and Practices
LEVEL Intermediate

Prerequisite
None

Overview
Unprecedented numbers of Canadians are looking to retire in the near or medium term. These people will undergo a transition from reliance on employment or operating assets to reliance on financial assets. This seminar will provide professional advisors with the tools to help themselves or their clients develop a personal financial plan, participate with other professional advisors giving financial advice, and help integrate clients’ personal financial planning into their corporate and family affairs.

Who Should Attend
Professionals who advise clients on corporate and personal financial matters, alone or in conjunction with other professional service providers, or those that want to develop a financial plan for themselves.

Content
• understanding the role and benefit of financial advisors (professional accountants, lawyers, investment managers, etc.) and selecting the relationships
• personal cash flow modeling (how much is enough?, impact of inputs on outcomes)
• strategic asset allocation
• understanding performance characteristics of asset classes
• understanding the risk and return trade-off
• combating the 3 evils of financial planning: inflation, taxes, and fees
• planning for family wealth succession (one generation to the next)
• planning for charitable giving
• transitioning from corporate asset dependence to personal asset dependence (personal and financial implications)

Comments from Past Attendees
“Great use of examples to illustrate concepts.” “Good overview of wealth management.” “Very practical and current.” “I enjoyed this seminar and found it useful.” “Applies to both personal and work.”

Seminar Leader to be drawn from
Cody McMullin, CPA, CA, CFA
Trevor O’Reilly, CFA

Seminar Leader to be drawn from
Cody McMullin, CPA, CA, CFA
Trevor O’Reilly, CFA

Nov 23 9am-12:30pm Marriott Inner Harbour, Victoria [A72030A_VI]
Nov 24 9am-12:30pm Van Conv Ctr West, Vancouver [A72030B_VA]
Fee $220 PD Passport Valid 1/2 Passport Day 3.5 CPD Hours
CPABC has rebranded the multitude of conference days we bring to you annually. Our new brand – Nexus – is intended to leverage the meaning of the word “connection/link”. Our Nexus days will be focused on helping you build connections to new knowledge, linkages to new themes, and creating environments where you can network and learn from your peers. Our Fall/Winter Nexus day lineup includes:

**PD Nexus: Public Practice Insights**  
Formerly Practitioners’ Potluck  
October 25, 2017 | Vancouver Convention Centre West

**PD Nexus: Financial Planning Insights**  
Formerly Personal Financial Planning Conference  
December 5, 2017 | Vancouver Convention Centre West

**PD Nexus: Business Insights**  
Formerly Members in Business & Industry PD Day  
December 6, 2017 | Vancouver Convention Centre West

**PD Nexus: Beyond Financial Reporting Insights**  
Formerly Beyond Financial Reporting Conference  
February 20, 2018 | Vancouver Convention Centre West
PD Nexus: Beyond Financial Reporting Insights
(formerly Beyond Financial Reporting Conference)
LEVEL General

Prerequisite
None

Overview
Our Beyond Financial Reporting Conference is geared specifically to help you develop your awareness and capabilities in aspects of your work that may be outside of your core responsibilities, such as HR, IT, change, and communications. As always, we will have tax and accounting sessions, and a variety of professional development topics that you may be managing “off the side of your desk”, all brought together to provide you with a fresh - and broader - perspective on professional development.

Who Should Attend
Professional accountants and other financial professionals who want to obtain additional knowledge and insights into topic areas that lie beyond their core responsibilities.

Content
The conference format day will include a keynote presentation in the morning, breakout sessions throughout the day, and a plenary session in the afternoon.

Comments from Past Attendees
“I thought this conference was one of the best that I have attended.”  “So impressed by the conference. It was tremendous.”  “Great topics. I found it very informative.”  “The day was worth investing the time.”

Conference Speakers
Our speakers are experts in their fields, and are highly regarded professionals in the business and academic community. A complete list of conference speakers and their biographies will be available on our website at pd.bccpa.ca, and in an upcoming edition of the PD Pathways newsletter.

Fee $475
PD Passport Valid 1 Passport Day 7 CPD Hours

PD Nexus: Business Insights
(formerly Members in Business & Industry PD Day)
LEVEL General

Prerequisite
None

Overview
In today’s business environment, it can be a challenge to keep on top of the rapid changes and developments. And yet, for businesses to survive and thrive their focus needs to be “future forward”. By attending this conference, you can pull ahead of the pack by staying informed of emerging trends and acquiring new knowledge and skills.

PD Nexus: Business Insights is designed to provide financial professionals with an efficient way of obtaining practical information to utilize in the workplace and inspiration for future growth.

Who Should Attend
Professional accountants and other financial professionals.

Content
The conference format day will include morning and afternoon plenary presentations, a choice of breakout sessions from two breakout streams throughout the day, and opportunities to network with other financial professionals.

Comments from Past Attendees
“I thought this conference was one of the best that I have attended.”  “So impressed by the conference. It was tremendous.”  “Great topics. I found it very informative.”  “The day was worth investing the time.”

Conference Speakers
Our speakers are experts in their fields, and are highly regarded professionals in the business and academic community. A complete list of conference speakers and their biographies will be available on our website at pd.bccpa.ca, and in an upcoming edition of the PD Pathways newsletter.

Fee $475
PD Passport Valid 1 Passport Day 7 CPD Hours
PD Nexus: Public Practice Insights
(formerly Practitioners’ Potluck)
LEVEL Introductory to Intermediate

Prerequisite
None

Overview
Now offered annually, this popular conference for CPABC members in public practice has been updated with new topics and a revised format. Practitioners will benefit from practical learning sessions that include both technical knowledge and practice management tips and advice. The conference format is designed to provide instruction in topical areas of importance to public practitioners, and to encourage discussion and the exchange of ideas.

The conference will be a great opportunity to update your technical knowledge and learn best practices to address some of the key changes and challenges in professional practice in BC today. Be prepared to learn, discuss, network with your peers, and enjoy this dynamic, interactive conference day.

Who Should Attend
All practitioners in public practice in BC would benefit from attending this conference, particularly sole practitioners and members of small to medium sized firms.

Content
The conference format day will include morning and afternoon plenary presentations and a choice of breakout presentations during the day, including two afternoon roundtables to share information and best practices on a topics relevant to you and your practice.

Comments from Past Attendees
“Overall good selection of topics.” “The pace and content and presenters were excellent.”

Conference Speakers
Our speakers are experts in their fields, and are highly regarded professionals in the public practice community. Senior staff from CPABC will also present updates on items of importance to practitioners. A complete list of conference speakers and their biographies will be available on our website, and in an upcoming edition of the PD Pathways newsletter.

Oct 25 8:30am-5pm Van Conv Ctr West, Vancouver [A77100A_VA]
Fee $475 PD Passport Valid 1 Passport Day 7 CPD Hours

PD Nexus: Financial Planning Insights
(formerly Personal Financial Planning Conference)
LEVEL General

Prerequisite
None

Overview
Whether you’re planning for your own financial future or you have clients who are looking to you for advice, this is one PD Nexus you don’t want to miss! The lineup includes well-respected speakers who are experts in their fields covering a variety of current and timely topics, from ethical investing to essential legal documents in any financial plan to financial analysis for retirement planning. The various sessions throughout the day are designed to help you understand and achieve your own and your clients’ personal financial plans.

Who Should Attend
Professional accountants and other financial professionals who want to obtain insights into the topic area of financial planning.

Content
The conference format day will include morning and afternoon plenary presentations and a choice of breakout sessions from two breakout streams throughout the day, and opportunities to network with other financial professionals.

Comments from Past Attendees
“This was one of the best courses I have attended over the last few years. All the speakers were excellent!” “Very much enjoyed the format with general topics and breakout sessions.”

Conference Speakers
Our speakers are experts in their fields, and are highly regarded professionals in the investment and professional communities. A complete list of conference speakers and their biographies will be available on our website at pd.bccpa.ca, and in an upcoming edition of the PD Pathways newsletter.

Dec 05 8:30am-5pm Van Conv Ctr West, Vancouver [T77200A_VA]
Fee $475 PD Passport Valid 1 Passport Day 7 CPD Hours
CPABC EXECUTIVE PROGRAMS
THE RIGHT FIT FOR YOU

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<th>PROGRAM</th>
<th>Description</th>
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<tr>
<td>THE CONTROLLER'S PROGRAM</td>
<td>Created with the aspiring and new Controller in mind.</td>
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<tr>
<td>The Controller's Operational Skills Program</td>
<td>Focuses on the core technical processes and procedures of the financial role.</td>
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<tr>
<td>The Controller's Management Program</td>
<td>Focuses on honing your personal and interpersonal effectiveness.</td>
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<td>THE CFO'S PROGRAM</td>
<td>Geared towards aspiring and new CFOs.</td>
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<tr>
<td>The CFO's Operational Skills Program</td>
<td>Focuses on the strategic technical competencies of the role.</td>
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<td>The CFO's Leadership Program</td>
<td>Focuses on developing the skills of an influential leader in your organization.</td>
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<td>CFO AS NAVIGATOR PROGRAM</td>
<td>Geared towards seasoned financial executives.</td>
</tr>
<tr>
<td>The CFO as Navigator Program</td>
<td>Is a stand-alone advanced program for more seasoned financial executives; it builds upon the foundational skills and concepts that add value and enhance the role within the organization.</td>
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The Controller's MANAGEMENT Program

As a Controller, you not only provide financial expertise in your organization, you provide leadership as a key member of the management team. Building on the foundation of your technical skills, your management and leadership skills will take you and your organization to the next level. The Controller's Management Program is designed to provide you with the theory, best practices, tools and skills to further sharpen your leadership and management skills. The program concentrates on four key leadership areas: Self-awareness and self-management; Organizational perspective and influence; Managing and leading others; Effective communication for a variety of contexts.

Who Should Attend
This program is for you if you are
• relatively new to a Controller or Financial Manager role
• aiming to move up to the Controller role from another position
• preparing to shift from a staff position or public practice into an industry management role
• looking to sharpen interpersonal and management skills

Special Features
• leadership assessments done prior to the program
• one-on-one coaching (on-site) – an opportunity to support the self-work with a professional Executive Coach to help establish personal and professional development goals

Faculty
Linda Lucas, CPA, CMA is Chief Executive Officer at Roper Greyell LLP, Employment + Labour Lawyers. Linda has twenty years of experience in all aspects of finance and operations, and has worked in many different industries across Canada, United Kingdom, Cayman Islands and the Bahamas. Linda's experience includes organizations experiencing significant growth, multiple locations & services, and diverse client bases. Her strategic focus and leadership skills will continue to enhance Roper Greyell's ability to lead and develop one of Canada's top boutique labour and employment firms.

Lesley-Ann Marriott, CEC, PCC is a Certified Executive Coach who holds the advanced credential of Professional Certified Coach. Lesley-Ann has over 25 years of leadership and management experience.

The Program
This is an in-residence program, and participants are encouraged to stay on-site. The program cost includes course materials and some meals. Accommodation is extra – please contact us for more information. The regular program fee is $3,150, but register at least two months prior to the offering date for an early bird discount of $300. Note: Executive Programs are PD Passport Invalid.

Upcoming Dates
October 11-14, 2017 | Westin Whistler Resort, Whistler
April 11-14, 2018 | Delta Grand Okanagan, Kelowna

The Controller's OPERATIONAL SKILLS Program

As a Controller, you are expected to be the financial expert in your organization. You are relied upon to produce, analyze and interpret the financial data that will be used by the executive team to make key financial decisions. To excel, you must continuously demonstrate leading edge knowledge and keen business acumen. The Controller's Operational Skills Program is designed to enhance your role on the management team by sharpening your skills in risk management and controls, ethical leadership, planning, budgeting and forecasting, performance measurement approaches and financial reporting. You will explore ways to maximize the effectiveness of your accounting department through staffing and structure, policies and procedures, and process and quality management. You will gain insights into performance enablers for success, with a focus on information management and human resources management, and an eye towards trends in Controllership.

Who Should Attend
Are you responsible for management and financial reporting? Do you want to build upon your operational skills and knowledge of Controllership? Do you want to gain more confidence and be more effective in your role? If you answered “yes”, and if you are either an aspiring Controller or an existing Controller, then this is the program for you.

Faculty
Mia Maki, BA, MBA, FCPA, FCMA, is faculty with the University of Victoria, Gustavson School of Business and Gill Graduate School, and is a consultant through Quimper Consulting Inc. Formerly Chief Financial Officer and Chief Operating Officer for a Victoria-based technology company, Mia has assisted in raising over $40 million in funds and in international initiatives including acquisitions (United States), strategic partnerships (Japan) and joint subsidiary creation (Europe).

The Program
This is an in-residence program, and participants are encouraged to stay on-site. The program cost includes course materials and some meals. Accommodation is extra – please contact us for more information. The regular program fee is $3,150, but register at least two months prior to the offering date for an early bird discount of $300. Note: Executive Programs are PD Passport Invalid.

Ethics Content
This seminar contains 4 hours of ethics content.

Upcoming Dates
October 15-18, 2017 | Westin Whistler Resort, Whistler
November 22-25, 2017 | Westin Bear Mountain, Victoria
April 15-18, 2018 | Delta Grand Okanagan, Kelowna
July 15-18, 2018 | Westin Whistler Resort, Whistler
The CFO’s LEADERSHIP Program

The role of the Chief Financial Officer (CFO) continues to evolve. Beyond technical expertise, today’s CFOs need to make strategic financial decisions in a changing dynamic environment. This necessitates inspired, authentic leaders capable of solving challenging problems as a valued member of the C-suite. From supporting strategic decision making through to strong financial stewardship, there is a need for the CFO to demonstrate expertise in a broad range of areas.

The CFO’s Leadership Program is an intensive and interactive program that blends best practices, case studies, group discussions and role-play to allow participants to advance their leadership skills to move from the technical aspects of being a finance professional, to being a strategic partner. This program concentrates on areas where CFOs have told us they feel they need the most help.

Who Should Attend
This program is for you if you
- direct, or wish to direct the finance and administration areas of your organization
- provide, or are seeking to position yourself as counsel to the CEO and the Board
- wish to expand your knowledge and develop your leadership skills as they apply to strategy execution and talent management in the finance and administration area
- want a unique opportunity to go beyond focusing on what you are doing as a leader to truly understand how you are being a leader

Faculty
Tammy Towill, MBA, FCPA, FCMA is a partner in the Cordura Group providing business and financial advisory services and related education and training programs to communities and organizations seeking growth or change. For over 20 years, Tammy has worked with private and public sector companies throughout North America and Europe.

Lesley-Ann Marriott, CEC, PCC is a Certified Executive Coach who holds the advanced credential of Professional Certified Coach. Lesley-Ann has over 25 years of leadership and management experience.

The Program
This is an in-residence program, and participants are encouraged to stay on-site. The program cost includes course materials and some meals. Accommodation is extra – please contact us for more information. The regular program fee is $3,250, but register at least two months prior to the offering date for an early bird discount of $300. Note: Executive Programs are PD Passport Invalid.

Upcoming Dates
November 15-18, 2017 | Westin Whistler Resort, Whistler
June 13-16, 2018 | Westin Bear Mountain, Victoria

The CFO’s OPERATIONAL SKILLS Program

As senior advisor to the CEO and the Board – the CFO has five distinct roles: business partner, scorekeeper, commentator, expert and custodian. These multiple functions mean that the CFO has to see both the forest and the trees, needs to understand the business and its numbers, as well as lead, develop and help execute the business strategy. This program delivers the core CFO competencies that organizations expect and demand. Get up to speed on corporate governance and risk management and the latest tools and application. Examine the relationship of strategy and risk-taking and help drive your organization’s mission and success.

Nail down the planning, budgeting and internal control competencies that facilitate efficient and effective operations. Explore the value-added CFO competencies in business valuation, business intelligence, M&A and intellectual property. Learn how to effectively communicate the core finance and operating results for internal and external stakeholders.

Who Should Attend
Do the CEO and the Board look to you for counsel and guidance? Do you currently direct, or wish to direct the finance and administration areas of your organization? Are you trying to improve governance, accountability and the control environment? Would you like to examine the state-of-the-art developments in strategy, risk management and financial reporting? If so, then this program was created with you in mind.

Faculty
Jeffrey Sherman, MBA, CIM, FCPA, FCA, has over 20 years experience as a Chief Financial Officer, primarily in the high tech, biotech and mineral exploration areas, with a large chartered bank in various senior capacities, and as a consultant in corporate finance. His areas of expertise include corporate governance, risk management, corporate finance, restructuring and start-up enterprises.

The Program
This is an in-residence program, and participants are encouraged to stay on-site. The program cost includes course materials and some meals. Accommodation is extra – please contact us for more information. The regular program fee is $3,250, but register at least two months prior to the offering date for an early bird discount of $300. Note: Executive Programs are PD Passport Invalid.

Ethics Content
This seminar contains 4 hours of ethics content.

Upcoming Dates
November 19-22, 2017 | Westin Whistler Resort, Whistler
June 17-20, 2018 | Westin Bear Mountain, Victoria
The CFO as Navigator
Steering the Enterprise towards Value Creating Growth

The 21st century CFO is hearing the new calling from the corporate boardroom - “Step out and go beyond the box”. The CFO as Navigator program is designed to provide you with a highly applied and interactive experience and will cover areas such as value creating growth, value metrics, best in class management reporting platform, enterprise dashboards, performance metrics and strategy maps, information management and business intelligence, corporate planning platform design and creation, talent management and incentive design. This program is designed to make you a complete CFO.

Who Should Attend
Do you feel that a broader knowledge base may augment your considerable finance/accounting knowledge? Are you interested in learning about new tools and methods to add value to your enterprise? Do you want to go beyond the stovepipe finance function? Do you have a desire to do more and be a complete CFO and lead a best in class finance function? If so, then this program is for you. This program is geared particularly towards those CFOs/Controllers in mid-market companies who are at the zenith of their career and are ready for the next challenge in their career.

Faculty
Dr. Vijay Jog is the Founder-President of Corporate Renaissance Group, a firm dedicated to driving better business management and performance. He has led CRG’s growth in areas of corporate dashboards, business intelligence, bridging the gap between technology, HR and finance, designing incentive systems and conceptualizing and creating innovative software applications that are used by thousands of organizations around the world. He is also the Chancellor Professor of Finance at the Sprott School of Business, Carleton University.

The Program
This is an in-residence program, and participants are encouraged to stay on-site. The program cost includes course materials and some meals. Accommodation is extra – please contact us for more information. The regular program fee is $3,250, but register at least two months prior to the offering date for an early bird discount of $300. Note: Executive Programs are PD Passport Invalid.

Upcoming Dates
September 20-23, 2017  |  Westin Whistler Resort, Whistler
May 23-26, 2018       |  Westin Whistler Resort, Whistler

Comments from Past Attendees

Controller’s Operational Skills Program
“Very useful program - helped me to understand better how my organization is structured and why, and identify areas/ opportunities for improvement.”

“Challenged me to consider the broader aspect of my job and to implement some new ideas.”

Controller’s Management Program
“The program provided valuable management training in the areas of coaching, leadership, change management, conflict management and managing people. This training will be essential to me as a leader in my workplace.”

“Great knowledge and networking tool. I thoroughly enjoyed the breadth of talent and backgrounds of my peers in the program. The knowledge and experience in the group was an invaluable working asset.”

CFO’s Operational Skills Program
“It was great to learn new ways to approach opportunities and challenges in the CFO role. Topics covered ranged from strategic to tactical and I look forward to implementing them to add value in my zone.”

“Excellent course to improve core competencies for any CFO or Finance Executive, and a great chance to interact in a wonderful setting.”

CFO’s Management Program
“A well-rounded program that covers a wide range of essentials needed for highly effective leadership. It was well presented and provided me with many takeaways. I enjoyed my time and highly recommend the course. Great presenters.”

“Both facilitators kept us moving through the large volume of information. The one-on-one coaching was invaluable and was a brilliant addition to the program.”

CFO as Navigator
“The course is such a wealth of knowledge. Illustrates just how much information is out there. Guides you to a point where you can dive in and get immersed.”

“This is an excellent course both for those new to the CFO position but also as a mechanism for experienced CFOs to assess whether they are paying attention to the right things.”
PD AudioWeb
Eligible for Verifiable CPD Hours!

PD AudioWeb are direct recordings from live PD seminars.

These recordings are available as downloadable MP3 audio files, along with any corresponding handout materials in PDF files, from our website.

These titles are eligible for Verifiable CPD Hours – in order to claim these hours as verifiable, you will be required to successfully complete a short quiz, also accessible via the website. Upon successful completion of the quiz, you will be able to print a certificate of completion.

How to get started
After you purchase your AudioWeb title(s), we will email you a web link where you can download the MP3 file to your own computer. You will also be able to download any available handouts or PowerPoint slides for that seminar in PDF. If the audio title is available, you will receive the email within one working day after your order is processed. After you have finished listening to the audio file, you can return to the webpage and complete the quiz.

• all new and updated AudioWeb titles will be available two weeks after the classroom seminar date – please take this into consideration before placing your order.

• most titles are recorded from Executive Breakfast sessions, and are eligible for 1.5 to 2 Verifiable CPD hours each – half-day sessions are eligible for 3.5 Verifiable CPD hours each – these hours are noted in brackets next to each title. The Estate Planning Series is eligible for 9.5 Verifiable CPD hours and comprises 10 sessions that were recorded from The Estate Planning Conference (Dec 2016).

• PD AudioWebs are eligible under the Personal and Flexi PD Passport programs. Each title costs 1/3 of a Passport Day, with the exception of The Estate Planning Series which costs 1 Passport Day.

PD AudioWeb Titles Available
Eligible CPD hours are indicated in brackets next to each title.

GENERAL MANAGEMENT TITLES

Cloud Computing
Dec 2016 (1.5)
The essentials of cloud-based computing for accounting in industry will be discussed: when to move your organization to the cloud; responsible transition from a paper-based to a cloud-based platform; security in the digital environment; best practices in digital file management; and cloud-based financial technology and integrations on the market.
Code: U75000MA_16 $75

Employment Standards Overview
Jun 2016 (3.5)
The purpose of this seminar is to review compliance with key provisions of the Employment Standards Act, including any recent updates, as well as commonly misunderstood and overlooked employment standards rules.
Code: U75001MA_16 $110

Ethics in the Real World
Dec 2016 (1.5)
This session will help you understand the four root causes of unethical behavior and eight steps to create an ethical business culture. You will also learn how to teach your team the basic tools of ethical decision-making and understand six approaches to making better ethical decisions. This sessions contains 1.5 hours of ethics content.
Code: U75003MA_16 $75

Handling Termination of Employment
Nov 2017 (2)
This session provides an overview of issues surrounding the termination of employment, and includes recent updates in the area.
Code: U75004MA_17 $75

Lenders, Banking, and Your Client
Dec 2016 (3.5)
This session will help you better understand what your lender wants, and in turn, how you can help your client or company better negotiate its borrowing facilities.
Code: U75005MA_16 $110

Maximixe Your Workforce:Bridging the Generational Divide
Dec 2016 (1.5)
This session dives into what you need to know to best enable today's workforce by helping you to: understand the drivers for four very different generations of team members interacting in today's workforce; build a culture that can accommodate the needs/expectations of each demographic group; and harness the strengths of each generational group to benefit the business, employees and customers.
Code: U75006MA_16 $75

Negotiating: Challenges & Pitfalls
Mar 2003 (2)
This session will look at some of the sharpest challenges faced by negotiators and mistakes we commonly make in response to them. It will provide some key learnings from negotiations research and experience to help you conduct more effective negotiations in challenging circumstances.
Code: U75007MA_03 $75
Planning for a Business
Nov 2016 (2)
Learn how to consider and challenge the drivers behind financial forecasts, and also explore how to quantify the non-financial aspects of the business; breakdown the linkages between strategy, mission and vision to increase overall effectiveness in all methods of planning; and create opportunities to enhance your knowledge and skills in both developing and formatting powerful business plans.
Code: U75100MA_16 $75

Reduce Your Exposure to Directors’ and Officers’ Liabilities
Dec 2008 (2)
This session will examine the obligations and pitfalls to which directors and officers are exposed, and will look at practical steps and procedures that should be implemented to avoid personal liability.
Code: U75109MA_08 $75

Retirement Planning for Financial Professionals
Jul 2017 (1.75)
This session will look at the changing conditions of older adulthood and new ways to approach financial planning. It will address common mistakes in personal strategies and areas to be particularly mindful about. Learn how to play to your strengths and still be alert to your own misconceptions so your later years can be secure, joyful and prosperous.
Code: U75115A_17 $75

Supercharge Your Business with IT
Jun 2017 (1.75)
This session will lead you through the process of transforming IT from disruptor to value creator. It will review some of the top applications and tools in areas such as communications and collaboration, task management, and personal productivity to transform your business using IT.
Code: U75114A_17 $75

Top Employment Issues Affecting Your Bottom Line
Dec 2017 (3.5)
This session will provide an overview of the top employment issues including recent developments in workplace law, focusing on those issues that materially impact the bottom line.
Code: U75110MA_17 $110

What is Your Happiness Practice
Jul 2015 (2)
Is it possible to develop strategies that help you sustain positive energy, deep engagement, and a sense of humour and lightness? If you have been on achievement autopilot driven by goals that keep you pressing forward, but not feeling excited and alive, this session will show you how to get more of the satisfaction you are craving.
Code: U75111MA_15 $75

What Leaders Know About Communication
Nov 2014 (2)
Leaders know that without effective communication skills, it is impossible to share a vision that will create a strategy that can support a team to create a successful outcome. In this session, you will learn more about improving your skill set as a master communicator. Stop wasting time and energy talking in circles – communicate like a leader instead.
Code: U75112MA_14 $75

Your People Strategy – Time for a Tune Up?
Oct 2016 (2)
You run a successful practice but are your people practices robust and in trend? Learn the latest strategies and tips for how to attract, hire, engage and retain the most critical resource, your people. Gain tips for: assessing and planning for additional people resources; strategies for recruiting in a social and modern world; orienting your new staff to increase engagement at the outset; growing and developing your staff in alignment with business needs; and more.
Code: U75113MA_16 $75

TAXATION TITLES

Basic Tax Compliance in Self-Employment and Home-Based Business
Feb 2018 (2)
You’re your own boss, but you’re stuck with all the paperwork too. What do you need to know to make sure you’re compliant with your tax obligations? This session will cover the fundamental tax compliance issues of setting up and running a self-employed small home business.
Code: U75101TA_18 $75

BC PST Refresher & Comparison with GST/HST
Nov 2017 (2)
This session is designed to provide a high level overview of basic British Columbia Provincial Sales Tax rules and to address differences between BC PST and Goods and Services Tax/Harmonized Sales Tax. It will help you recognize your (or your clients’) PST responsibilities and entitlements. It is designed to be broad in scope and will not focus on any particular industry.
Code: U75123TA_17 $75

Breaking Up is Hard to Do
Jun 2017 (3.5)
When a marriage or common-law relationship ends, dividing the family assets can be stressful and complicated. Learn how business and family assets are classified in family law and the role you can play in effectively advising both lawyers and clients.
Code: U75102TA_17 $110

Charitable Giving Update
Dec 2015 (1.75)
Charitable giving is a personal matter. It can be very rewarding to those who achieve their personal donation goals and at the same time provide tax and estate planning benefits to the donor. This session will examine the many tax changes to charitable giving from the past several years, and review the different charitable giving planning strategies.
Code: U75103TA_15 $75

Creative Use of Partnerships in Tax Planning
Jun 2017 (3.5)
This session will focus on the use of partnerships in creative tax planning, including some of the more common issues and pitfalls encountered by practitioners.
Code: U75104TA_17 $110

Employing Contractors and Contracting Employees: Sorting Out Tax and Legal Issues
Jul 2016 (2)
The session will distinguish between employment and independent contractor relationships and examine the liabilities and advantages of each type of relationship. In addition, the seminar will highlight some of the tax planning opportunities as well as areas of potential concern associated with these relationships.
Code: U75105TA_16 $75
Ethical Tax
Oct 2016 (1.5)
Tax is seldom black or white. In this session, case studies will be used to provoke discussion on ethical dilemmas confronting accountants related to tax matters. You will be challenged to consider how you would handle a variety of ethical tax scenarios and will develop your ability to recognize ethical tax issues as well as your confidence in handling ethical tax dilemmas. This sessions contains 1.5 hours of ethics content.
Code: U75106TA_16     $75

FATCA – Plain and Simple
Feb 2014 (2)
Starting June 30, 2014, all Canadian entities will have responsibilities under "Foreign Account Tax Compliance Act" (FATCA). This session is designed to help you understand the impact FATCA may have on your clients or your own enterprise. It will provide an overview of the FATCA rules, key responsibilities under the rules, and the risks of non-compliance.
Code: U75107TA_14     $75

GST/HST: Tips & Traps
Feb 2018 (2)
This session will serve as an introduction/refresher to common GST/HST tips and traps. It is a high level overview designed to make you aware of common mistakes and audit issues, and to help you better design the efficiency of your (your clients’) GST/HST function. It is designed to be broad in scope and will not focus on any particular industry.
Code: U75124TA_10     $75

International Employees – Cross Border Tax and Social Security
Dec 2016 (2)
International mobility is common place in our globalized economy. However, the tax implications for the individuals, and tax compliance obligations of employers, are not comparatively common knowledge. This session will cover the tax tips and traps of cross border employment for both in and out-bound arrangements to/from Canada.
Code: U75108TA_16     $75

Introduction to Portfolio & Investment Management Techniques
Dec 2016 (1.75)
This session will provide you with an understanding of basic portfolio and investment management techniques for use in your own investment portfolio. You will learn about the building blocks of portfolio and investment management used by professional advisors. You will come away with a greater understanding of how to manage your own portfolio, and/or develop a better benchmark against which to gauge your personal financial advisor.
Code: U75109TA_16     $75

Legal Considerations in Personal Planning for Death and Incapacity
Feb 2018 (2)
The Wills, Estates and Succession Act (WESA) came into force in BC on March 31, 2014, and resulted in major changes in practice and procedure in the probate and estate planning field. This session will provide an overview of WESA, how it relates to your practice and what you need to know so that you can more effectively assist your clients under WESA.
Code: U75110TA_18     $75

Planning for Disabled Taxpayers and Their Families
Nov 2016 (2)
An estimated 400,000 to 600,000 Canadians are "disabled". This seminar will provide practical information on Registered Disability Savings Plans and other tax advantaged programs available for disabled taxpayers, including the new qualified disability trust rules. It will also discuss how these programs interact with the provincial disability assistance scheme in BC.
Code: U75111TA_16     $75

Practical Transfer Pricing & Update on Latest Developments
Nov 2016 (2)
The objective of this session is two-fold; primarily to provide real-life, practical commentary and guidance for members in industry, as well as those assisting clients to implement transfer pricing policies, and secondarily, to provide a brief update on the latest developments affecting transfer pricing in Canada.
Code: U75122TA_16     $75

Probate Fee Avoidance Planning
Nov 2017 (2)
The session will review the fundamentals of when and why probate is required and what property is subject to the process. It will also examine the various strategies that can be employed to avoid probate fees. Each probate fee avoidance strategy will be discussed in the context of achieving other common estate planning goals.
Code: U75133TA_17     $75

Safe Income – A Comprehensive Review
Jul 2017 (2)
This session will provide a comprehensive review of the concepts of safe income, the relevant case law and a review and update on the CRA’s positions surrounding safe income. It will also provide some practical issues to consider when dealing with safe income.
Code: U75144TA_17     $75

SBD Multiplication – Closing the Loopholes & the Impact on CCPCs
Jul 2017 (2)
The 2016 Federal Budget put in place complicated new rules to prevent the multiplication of the small business deduction by owners of a business. The impact of these rules is more widespread than the budget document suggested and will add complexity to many corporate tax returns. This session will summarize these rules and discussion new ownership structures and other considerations for companies that are impacted by these rules.
Code: U75155TA_17     $75

Tax Changes to Estates & Trusts
Jul 2016 (2)
The objective of this session is to review the legislative changes to the taxation of estates and trusts, including loss of graduated rate taxation and non calendar year-end selection; taxation of deemed gains realized in alter ego, joint partner and spouse trusts; and rules to allow increased flexibility in the use of donation credits between a deceased individual and their estate – all of became effective as of January 1, 2016.
Code: U75166TA_16S$75
Tax in Troubled Times
Jun 2014 (2)
As a result of the recent economic times, many enterprises are facing financial difficulty and tax loss situations. This session is intended to review corporate tax issues in trouble times. It will provide an overview of debt forgiveness issues, strategies to preserve debt funded losses, loss utilization issues and strategies to utilize losses.
Code: U75117TA_14 $75

Tax Issues in Shutting Down a Corporation
Nov 2017 (3.5)
This session will focus on the many tax issues that arise – both compliance and planning related – when shutting down a corporation, and will primarily focus on private companies. It will deal with taxable and non-taxable amalgamations and windups, as well as corporate dissolutions. Common traps and planning opportunities will be discussed.
Code: U75118TA_17 $110

Tax Issues in Starting a Business
Dec 2017 (3.5)
This session focuses on the many tax issues that arise – both compliance and planning related – when starting a business. The session is primarily focused on private companies. It does not touch on provincial-specific regulations or non-tax issues that are relevant to private companies. Common traps and planning opportunities will be discussed.
Code: U75119TA_17 $110

To Be or Not To Be: The Executor – Powers, Obligations & Liabilities
Nov 2017 (2)
This session examines the stages of estate administration, from date of death through to distribution, final accounting and release.
Code: U75120TA_17 $75

U.S. Tax Considerations for Delinquent Filers Resident in Canada
Dec 2016 (2)
The objective of this session is to outline the U.S. tax issues and filing requirements for U.S. persons (U.S. citizens and green card holders) resident in Canada with an emphasis on delinquent filers. The U.S. expatriation provisions will also be covered.
Code: U75122TA_16 $75

The Estate Planning Series
Oct 2016 (9.5)
The Estate Planning Conference Day is a joint conference by The Society of Trust and Estate Practitioners (STEP) Vancouver and the CPABC, to be held in October 2016. We will have some recorded sessions available in PD AudioWeb format as “The Estate Planning Series”. By purchasing this package, you will receive the following recorded sessions:
Recent Developments in Family Law (1 hour)
Estate Planning: Surprise! Your Client has U.S. Citizenship/Property/Children (55 minutes)
New Section 55 & Estate Planning (55 minutes)
Planning for Families with Special Needs (55 minutes)
Charitable Giving (55 minutes)
Trust & Estate Law Update (55 minutes)
Tax Issues in Common Estate Planning Techniques (55 minutes)
Life Insurance Planning: An Update (55 minutes)
Living with the Three Circle Model-Family, Ownership & Enterprise (55 minutes)
Tax Rules for Trusts and Estates in 2016 (1 hour)
Code: U7520TA_16 $285
Interactive Online Seminars

We are pleased to continue to offer the following seminars converted into interactive on-line modules. Past participants feel that this convenient, economical and interactive seminar delivery is a perfect alternative for those having difficulty attending our seminars, or who want to experience a new and innovative way of learning.

What You Can Expect

Prior to the session commencement, you will be given password access to the online courseware via e-mail. You will find instructions on how to work through the session, all necessary seminar materials, as well as a range of interactive learning activities designed to make studying on the internet a rich and relevant experience. Each session will be offered in module format. Access to the expert (instructor) online will be available over the duration of the session, except for sessions that are indicated as “on-demand”.

How to Get Started

1. Ensure you have access to a computer with the minimum computer requirements (below), internet, and possess basic computer skills.
2. Submit your registration, payment, and an email address.
3. “Getting Started” instructions will be emailed to you (this is usually sent a few days before the start date).
4. Clicking on the link and then entering your ID and Password when prompted will enable you to access the course site.

Minimum Computer Requirements

The default format for use during your program will be Microsoft Word and Excel. The program will run best from a cable or higher connection. You will also need current Adobe Flash Plugin, current Adobe PDF Reader Plugin, and current Java Plugin.

Verifiable CPD Hours

Each title qualifies for verifiable CPD hours upon successful completion of the quizzes at the end of each module.

Available Titles: Specified Dates

ASPE: A Survey of the Standards
LEVEL Intermediate
This seminar will review ASPE, from Section 1000 to Section 3870, and the accompanying Accounting Guidelines. See page 32 for detailed description.
Oct 16-Dec 31 Code: A75000B_OL | Jan 15-Mar 16 Code: A75000C_OL
$440 2 Passport Days 14 CPD Hours

Audit: A Survey of Standards with Practical Application
LEVEL Intermediate
This seminar will provide participants with a solid foundation in the practical application of the CASs to auditing engagements. See page 26 for detailed description.
$440 2 Passport Days 14 CPD Hours

IFRS: A Survey of the Standards
LEVEL Intermediate
This seminar will provide participants with a solid introduction to the IFRSs incorporated as part of CPA Canada Handbook – Accounting – Part I. See page 35 for detailed description.
$440 2 Passport Days 14 CPD Hours

NFPOs: A Survey of the Standards
LEVEL Intermediate
This seminar will provide an overview of the accounting standards for NFPOs under Part III of the CPA Canada Handbook. See page 39 for detailed description.
$220 1 Passport Day 7 CPD Hours

Income Tax Planning Refresher: Corporate
LEVEL Intermediate
This is a refresher course for those who desire to update their knowledge in the various taxes and tax planning that impact the corporate taxpayer. See page 117 for detailed description.
Oct 16-Dec 31 Code: T75000B_OL | Jan 15-Mar 16 Code: T75000C_OL
$440 2 Passport Days 14 CPD Hours

Income Tax Planning Refresher: Personal
LEVEL Intermediate
This is a refresher course for those participants who desire to refresh their knowledge in personal tax, trusts and partnerships. See page 118 for detailed description.
Oct 16-Dec 31 Code: T75100B_OL | Jan 15-Mar 16 Code: T75100C_OL
$440 2 Passport Days 14 CPD Hours

Available Titles: On-Demand
(no access to instructor)

Accounting Update for Private Enterprises and Not-for-Profit Organizations
LEVEL Intermediate
This seminar will review recent revisions to Part II – Accounting Standards for Private Enterprises and Part III – Accounting Standards for Not-for-Profit Organizations.
On-demand Code: A75060B_OL $75 1/3 Passport Days 2 CPD Hours

IFRS: Update 2017
LEVEL Intermediate
This seminar will provide participants with a review of new and revised IFRS during the past year. See page 38 for detailed description.
On-demand Code: A75040B_OL $110 1/2 Passport Day 3.5 CPD Hours

Management Accounting Refresher
LEVEL Introductory
This seminar provides participants with an understanding of the variety of management accounting information available within an organization. See page 48 for detailed description.
On-demand Code: A75060B_OL $110 1/3 Passport Day 2 CPD Hours

Review Engagements under the Current Standards
LEVEL Introductory
This seminar provides practitioners with a refreshed skill set for completing review engagements. You will have a better understanding of what is required under professional standards for a review engagement, the risks associated with engagement where efficiencies can be gained in file preparation, and preparing for upcoming review engagements.
On-demand Code: A75050B_OL $110 1/2 Passport Day 3.5 CPD Hours
K2E Canada Inc
Technology-Focused Webinars

CPABC in partnership with K2E Canada Inc are pleased to present the following technology-focused webinars to our members. Participants who take these webinars will have the opportunity to learn from an award-winning team of instructors.

How to Get Started
1. Upon registration and payment, the participant will receive an email from K2 confirming their registration along with instructions on how to join the session.
2. To connect to the online training session, simply click on the designated link in the email message.
3. Audio options – you can either listen in through your computer’s audio system, or dial-in to the online training event using your phone. Please note these will not be toll-free calls.
4. Platform – K2 will use the GoToTraining solution from Citrix as the training platform. This solution works with virtually all computers.

Verifiable CPD Hours
Testing is required to complete a K2 online training course and earn CPD credits. However, at intervals during the presentation, you will need to respond to polling questions to confirm your attendance and active participation in the event. A minimum of four polling questions will be presented for each recommended CPD credit hour. You must answer at least 75% of these questions in order to receive full CPD credit for the program.

Upcoming Webinars
The following are some webinar titles scheduled for this upcoming fall and winter. Please go to our website at pd.bccpa.ca for course descriptions, dates, and price, as well as the most updated list of available titles. These webinars are also PD Passport valid – please refer to the course descriptions on the website for the number of passport days required, as sessions vary in length.

September 2017
Create Stunning Dashboards with Power BI Desktop
Excel Financial Reporting and Analysis
Information Security - A Practical Approach
Introduction to Excel Macros
Microsoft Office 2016 - Improving Productivity with New Features
Power Charting in Excel
Profiting with Excel's Best New Features
QuickBooks Online - Changing the Paradigm of Small Business Accounting
Reporting Tools for Productivity
Securing Your Data - Practical Tools for Protecting Information
Top PDF Features You Should Know
Windows 10 Tips and Tricks
Detecting and Preventing Spreadsheet Errors
Do It Yourself Business Intelligence
Excel Budgeting Techniques
Microsoft Outlook Tips, Tricks and Advanced Techniques
Power Up Your PivotTables
PowerPivot and Power View - Desktop Analytics in Excel

October 2017
Advanced Excel
Critical Tips for Avoiding Identity Theft
Excel Best Practices
Excel Dashboards and Visual Elements
Excel Essentials for the Busy Professional
Excel Tips, Tricks and Advanced Techniques for Accountants
Microsoft Access Fundamentals - Tables and Queries
Microsoft Office 2016 - Improving Productivity with New Features
Microsoft Outlook - Organizing the Inbox
PDF Forms - Retire the Typewriter
Profiting with Excel's Best New Features
Tech Tools and Gadgets for a More Efficient You!
Technology Update
Working Effectively from Anywhere

November 2017
Advanced Excel Functions and Formulas
Excel Essentials for the Busy Professional
Excel PivotTables for Accountants - Part II
Excel Techniques for Detecting and Preventing Fraud
Excel-Based Dashboards
Integrating Excel with Word and PowerPoint
Introduction to Excel Macros
Microsoft Outlook - Contacts, Calendars, and Meetings
PivotTables 101
Power Up PowerPoint
Top Excel Tips and Tricks

December 2017
Create Stunning Dashboards with Power BI Desktop
Dashboard Reporting Tools and Techniques
Detecting and Preventing Spreadsheet Errors
Do It Yourself Business Intelligence
Excel 2013/2016 - Best New Features for Accountants
Excel Best Practices
Excel Budgeting Techniques
Excel Data Combination and Consolidation
Excel Guru - Tips to Make Your Head Spin
Excel PivotTables for Accountants - Part I
Excel Tables - Database Technology Comes to Spreadsheets
Harness the Power of Array Formulas
Integrating Excel with Word and PowerPoint
Introduction to Excel Macros
Microsoft Office 2016 - Improving Productivity with New Features
Office 2016 or Office 365 - Make the Right Decision
Power Up Your PivotTables
Securing Your Data - Practical Tools for Protecting Information
Top Excel Tips and Tricks
Word Advanced Tips, Tricks, and Techniques

Registration Note
Please note that as login instructions and course reminders will be emailed to the registrant from K2E, it is necessary for CPABC to provide your name and email to K2E Canada Inc – these will be used solely for confirmations and reminders for the registration(s) only.
Corporate Finance Institute (CFI)

Archived Webinars

Corporate Finance Institute (CFI) courses are designed for finance professionals and industry practitioners who want to master the art of corporate finance. The courses move through three levels of mastery for anyone looking to be an expert in financial modeling, valuation, and financial analysis. Participants typically include professionals in entry to mid-level positions in financial planning & analysis (FP&A), corporate development, treasury, investor relations, and capital markets. The following archived webinars are available to CPABC members at a special price and are also PD Passport valid.

Available Titles

Math for Corporate Finance

LEVEL 1
This course demonstrates how a number of mathematical formulas can be used to conduct detailed analysis on a set of data and/or variables. Modules: discounted cash flows; bond pricing and yields; module 3 – key statistical skills; module 4 – covariance, correlation and regression.

$60 1/3 Passport Day 2 CPD Hours

Financial Analysis Fundamentals

LEVEL 1
This course demonstrates how you can perform a financial analysis on any organization using a wide variety ratios derived from its financial statements. Modules: analyzing the income statement; analyzing the balance sheet; funding the business; pyramid of ratios

$120 1/2 Passport Day 4 CPD Hours

Financial Modeling Fundamentals

LEVEL 1
This series provides tips and tricks for Excel model builders, gives advice on how to audit your financial models, demonstrates how to use better formulas, and shows you how to monitor and handle uncertainty using scenario planning. Modules: Excel tips and tricks; better formulas; catering for uncertainty; auditing a model.

$180 2/3 Passport Day 4 CPD Hours

Building a Financial Model in Excel

LEVEL 2
This series guides you through how to apply a structured approach to financial modeling in Excel. Modules: a structured approach to financial modeling; forecasting income statement and balance sheet items; debt and financing schedules; building a free cash flow forecast.

$250 1 Passport Day 4 CPD Hours

Business Valuation Fundamentals

LEVEL 2
This course provides participants with the skills needed to do a basic business valuation. Modules: valuation using equity multiples; valuation using enterprise value multiples; valuing a business using discounted cash flows; determining the cost of capital.

$180 2/3 Passport Day 4 CPD Hours

Rolling 12-Month Cash Flow Forecast

LEVEL 2
Learn to build a cash flow model from scratch complete with assumptions, financials, supporting schedules and charts. We will look at how to forecast revenues, operating expenses and changes in balance sheet items to arrive at monthly cash flow. From there we will assess the financial impact on the business, decide if capital needs to be raised, evaluate credit metrics, and create elegant charts to inform management.

$180 2/3 Passport Day 4 CPD Hours

Behavioral Finance Fundamentals

LEVEL 2
In this course, you will learn about the wide range of decision making biases and information processing errors that influence our financial decision making. Modules: decision making biases and errors; information processing errors; how decisions are impacted by others.

$90 1/3 Passport Day 2 CPD Hours

Excel Dashboards & Data Visualization

LEVEL 3
This in-depth course will teach you how to build a custom Excel dashboard using professional data visualization techniques. By the end of the course you will have a solid understanding of how to tell a story by combining data, charts, graphs, and other visuals.

$90 1/3 Passport Day 2 CPD Hours

Sensitivity Analysis for Financial Modeling

LEVEL 3
This advanced financial modeling course takes a deep dive into sensitivity analysis. By the end of this course you will have a thorough grasp of how to build a robust sensitivity analysis system into your financial model.

$90 1/3 Passport Day 2 CPD Hours

Financial Modeling Using VBA

LEVEL 3
This course provides participants with the skills needed to incorporate Visual Basic for Applications (VBA) into financial models. Modules: introduction to VBA for financial modeling in Excel; design, build and run VBA sub procedures; create customized Excel functions; branching, looping and procedure code.

$180 2/3 Passport Day 2 CPD Hours

Startup/eCommerce Financial Model and Valuation

LEVEL 3
Master the art of building a financial model and valuing an eCommerce Startup. In this course you will learn to build a startup financial model from scratch complete with assumptions, financials, valuation, and output charts. We will look at how much money this business has to raise based on its business plan and model out each year of cash flow.

$250 1 Passport Day 4 CPD Hours

Mining Financial Model & Valuation

LEVEL 3
Master the art of building a financial model for a mining asset, complete with assumptions, financials, valuation, sensitivity analysis, and output charts. In this course we work through a case study of a real mining asset by pulling information from the Feasibility Study, inputting it into Excel, building a forecast, and valuing the asset.

$250 1 Passport Day 4 CPD Hours

Advanced Excel Formulas

LEVEL 3
Learn the most advanced formulas, functions and types of financial analysis to be an Excel power user. This course builds on our free Excel Crash Course and is designed specifically for spreadsheet users who are already proficient and looking to take their skills to an advanced level. The main formulas and functions covered: INDEX and MATCH; IF with AND/OR; OFFSET combined with other functions; CHOOSE for creating scenarios; INDIRECT combined with other functions; XNPV and XIRR; CELL, COUNTA and MID functions combined together; PMT, IPMT and principal payment calculations.

$60 1/3 Passport Day 2 CPD Hours

Visit our website at pd.bccpa.ca for more details on the courses.
ProDio Audio Learning Inc

CPABC is pleased to announce an innovative pilot project with ProDio Audio Learning Inc. (ProDio), a Canadian Company based in BC, to take place in the Fall/Winter season. ProDio creates audio-only verifiable PD courses delivered via mobile application; a convenient and flexible way to complete your PD courses “on the go” via your smartphone or tablet, or listening via the web desktop version. ProDio offers high quality, fully produced audio-only courses that are engaging, concise and easy to listen to, testing your learning along the way. Course content includes expert interviews, interesting stories, sounds, case studies and media clips. Create your own unique learning experience in an audio-only environment that gives you freedom from your screen while you listen and learn - anytime, anywhere.

When purchasing ProDio courses through CPABC, you will be provided with a link to access your course via mobile app or web. Accessing your ProDio course on your smartphone will require you to download and install the ProDio mobile app which is available for free through the App Store and Google Play.

Product Availability

These products are available only between October 1, 2017 and January 31, 2018.

Available Titles

Lies, Alternative Facts and Professional Skepticism

LEVEL Intermediate

When you read a headline online that says “Insanity: The Word ‘Man’ Is Banned At Princeton University,” do you immediately think “That goes too far!”? Or is your first reaction “Really? That sounds like an author writing a sensational headline to generate traffic to their article.”? As professionals, our clients and the public in general count on us to be the “voice of reason” and to show a healthy amount of skepticism. In fact, professional skepticism is one of the key underlying competencies supporting our ability to meet our ethical requirements. In this session, we’ll examine and de-bunk common examples of ways to present questionable or misleading messages. We’ll talk about how to spot deceptions and out-of-context illustrations, and how to apply critical thinking to ask probing questions and sharpen our responses. We’ll also explore the International Ethics Standards Board for Accountants’ proposed broadening of professional skepticism and judgment guidance for professional accountants, and how skepticism is a key part of the judgment we need as professionals to meet our ethical obligations under the CPA Code of Professional Conduct. This seminar contains 2 hours of ethics content.

Leading Through Influence

LEVEL Introductory to Intermediate

In the words of author and business coach Ken Blanchard, “The key to successful leadership today is Influence, not Authority”. We talk to experts as we explore this concept of influence and why it is so important to long-term success in leadership. Content includes: What is influence and why is it important; emotional intelligence and influence; social management and the permission to influence; 5 influencing styles; push vs. pull leadership; and a practical model for influencing.

Conversations in the Boardroom

LEVEL General

Building a strong ethical culture doesn’t just happen – it requires purposeful attention to set and maintain a tone at the top that represents a genuine commitment to corporate and individual responsibility. This tone also needs to permeate throughout all levels of the organization and lead to confidence in making decisions that reflect ethical values. In this two-part session, we’ll explore decision-making in the boardroom and in the hallway, and look at ways to enhance an ethics-based culture no matter what your role is. We’ll be speaking with a range of seasoned business leaders who share their experiences in enhancing ethics throughout their organizations’ infrastructure.

Conversations in the Boardroom will examine issues facing those charged with governance, including: managing the tone at the top; the benefits of diversity in the boardroom; the threat of unconscious bias; and learning from the experience of others. Conversations in the hallway explores the challenges of building an ethics-based culture through day-to-day activities and includes: ethical leadership at all levels; the importance of the “mood in the middle”; making talk about ethics the norm; and promoting and rewarding ethical decisions. This seminar contains 2 hours of ethics content.

Planning Foundations

LEVEL Intermediate

We all know about planning, and that we should plan, but do we really understand “Why” and “How” to plan effectively. Using real-world examples, case-studies and discussions with experts, this 2-part audio course will provide an engaging and thought provoking look at why planning is so important and why most managers and leaders fail to plan effectively. Content includes: creating a pro-active planning culture that looks ahead; how planning should really work; creating a compelling vision for your business; strategy and strategic drift; why SWOT is seldom an effective planning tool; planning using Michael Porter’s 5 forces; the Strategic Accountability Reporting (STAR) framework for planning; and accountants as your best early warning system.

Planning Foundations
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ETHICS
ONLINE LEARNING
Ethics and Tax
Ethical Principles and the Accounting Profession: Code Decoded Ethics for the CFO Success Podcast Series: Ethics and Governance cpacanada.ca/EthicsPodcast

TECHNOLOGY
CERTIFICATE
Excel Certificate Program cpacanada.ca/ExcelCertificate

ONLINE LEARNING
Introduction to Cybersecurity for CPAs cpacanada.ca/IntroCybersecurity Success Podcast Series: IT and Innovation cpacanada.ca/ITPodcast

LEADERSHIP & MANAGEMENT CERTIFICATE
Emerging Leaders Certificate Program cpacanada.ca/EmergingLeaders

ONLINE LEARNING
Leading Organizations From a People Perspective cpacanada.ca/LeadingOrgs Success Podcast Series: Leadership and Performance Measurement cpacanada.ca/PMPodcast

NOT-FOR-PROFIT WORKSHOP

ONLINE LEARNING
Auditing Not-For-Profit Organizations cpacanada.ca/AuditNFPn
The Compliance Life Cycle: NFPs and Registered Charities cpacanada.ca/ComplianceLifeCycle

CONFERENCE
Not-For-Profit Executive Forum February 26-27, 2018 Toronto, ON or attend virtually cpacanada.ca/NFPForum

FINANCIAL REPORTING
CONFERENCES
The 2017 IFRS Conference – Americas November 1-3, 2017 | Toronto, ON cpacanada.ca/IFRSConference
Conference for the Oil and Gas Industry November 28-29, 2017 | Calgary, AB cpacanada.ca/OilGas
Conference for Audit Committees Nov 30-Dec 1, 2017 | Toronto, ON cpacanada.ca/CPAC

ONLINE LEARNING
Look Out, the Auditors Are Coming cpacanada.ca/AuditorsAreComing

PERFORMANCE MANAGEMENT CERTIFICATE
Certificate in Driving Organizational Profit and Performance cpacanada.ca/PROCert

ONLINE LEARNING
Executing Performance Through Strategy Mapping cpacanada.ca/StrategyMap
Effective Operational Planning and Budgeting cpacanada.ca/Budgeting
Using Cost Planning to Meet Profit Targets cpacanada.ca/CostPlanning
How to Ensure Financial Stability Through Analytical Decision Making cpacanada.ca/FinancialStability

INCOME TAX
IN-PERSON COURSES
In-Depth Tax Course Registration for Year 1 opens July 6, 2017 cpacanada.ca/INDepthTax
In-Depth International Tax September 16-20, 2017 | Niagara-on-the-Lake, ON cpacanada.ca/IIT
In-Depth Tax Director’s Course November 4-7, 2017 | Blue Mountain, ON cpacanada.ca/TaxDirectors
In-Depth Tax Issues for the Owner-Managed Business November 4-8, 2017 | Blue Mountain, ON cpacanada.ca/TIORMB
In-Depth Corporate Reorganizations November 11-15, 2017 | Saint-Sauveur, QC cpacanada.ca/CorporateReorg

ONLINE LEARNING

INCOME TAX
ONLINE LEARNING (CONT’D)

INDIRECT TAX
ONLINE LEARNING
GST/HST cpacanada.ca/GSTHST

SPECIALIZED GST/HST COURSES:
Cross-Border Transactions cpacanada.ca/CrossBorder
Public Sector Bodies cpacanada.ca/PublicSectorBodies
Real Property cpacanada.ca/RealProperty

CONFERENCE
Commodity Tax Symposium November 13-14, 2017 Toronto, ON or attend virtually cpacanada.ca/CTS

TRANSFER PRICING
IN-PERSON COURSE
In-Depth Transfer Pricing October 2-4, 2017 | Toronto, ON cpacanada.ca/TransferPricing2

ONLINE LEARNING
Transfer Pricing cpacanada.ca/TransferPricing

SPECIALTY PRACTICE AREAS
Offered in conjunction with AICPA

CREDENTIALS
Certified in Financial Forensics (CFF) cpacanada.ca/CFF
Certified Information Technology Professional (CITP) cpacanada.ca/CITP

CONFERENCE
AICPA Women’s Global Leadership Summit November 8-10, 2017 Chicago, IL or attend virtually
AICPA Doing Business in North America Conference November 8-10, 2017 Chicago, IL or attend virtually
AICPA Forensic and Valuation Services Conference November 13-15, 2017 Las Vegas, NV or attend virtually cpacanada.ca/AICPA

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We are proud to introduce our instructors for the Fall 2017/Winter 2018 PD Program. We thank these committed professionals for the time and talent they contribute to our seminars. If you, or someone you know, would be interested in developing or teaching a seminar, please contact:

Simone Leonard, CPA, CGA
Vice President, Education and Professional Development
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ASIF N. ABDULLA, JD is an associate at the Vancouver office of Thorsteinssons LLP, practicing in the area of domestic and international tax planning for individuals, trusts, corporations and other private enterprises. Asif’s practice is focused on advising individuals and businesses in respect of succession and estate planning, tax-driven corporate reorganizations, immigration/emigration tax planning, business structuring and cross-border tax planning. Asif acts for a number of clients who are in dispute with the CRA and provides advice in respect of applying under the Voluntary Disclosure Program.

BRUCE ACTON, FCMC, MBA. Bruce’s expertise includes business process redesign, strategic planning and performance measurement. He has won a number of awards with his clients for his consulting work. He brings a broad background consulting to not for profits, the private and public sector.

KAMAL BASRA, BSc, CFP, FMA, FCCI, brings an ability to evaluate and analyze concepts and data into language that her financial advisory clients can understand. As the co-founder of Sophia Financial Group and a Certified Financial Planner, Kamal is deeply committed to empowering investors with the knowledge and confidence they need to make appropriate and suitable decisions about their finances. As a member of several local and international organizations Kamal is known for her ability to evaluate and report on financial performance and risk management issues for sustainable delivery of not for profit programs.

LIETTE BATES-EMER, CPA, CA is a Senior Audit Manager with KPMG. Liette has significant experience in providing audit services to public sector and not-for-profit organizations, managing engagements both large and small in scale. She is a member of KPMG’s BC Public Sector/Not-for-Profit Network and KPMG’s National Not-for-profit Network. Her community involvement has included serving as Treasurer for the Victoria Women’s Transition House Society for 6 years and serving as a Community Advisor to the Victoria Foundation. She is currently the Treasurer for Habitat for Humanity Victoria.

KARINE BENZACAR, MBA, FCFA, FMOA, CFA is a seasoned industry professional with over 20 years of industry experience. After beginning her career in the finance departments of Avon Products and Kraft Foods, she held senior management positions at three major Canadian Banks – Royal Bank of Canada, Bank of Nova Scotia, and Bank of Montreal. Her career has spanned many functional areas including accounting, finance, capital markets, project management, re-engineering, and strategic management. She has performed consulting work, developed financial courses, and trained thousands of professionals from a wide variety of industries.

TARA BENHAM, FCFA, FCA is a tax partner with Hayes Stewart Littel & Company. Tara has been in public practice since 1993 and has specialized in corporate and personal tax matters since 1997. Her practice encompasses complex tax analysis, planning and compliance particularly for small and medium size enterprises. Much of her work is focused on structuring related to buying and selling businesses, estate and succession planning. She also has extensive experience with all financial aspects of matrimonial negotiations and settlements.

WARD BLATCH, CPA, CA is a partner with K2 Enterprises Canada. Since joining K2 Enterprises in 2005, he has provided consulting and training services throughout the United States and Canada. Ward also has his own practice in Nova Scotia providing accounting, business consulting, training, and information technology support and evaluations to small business.

LAIRD BRANHAM, CPA, CA, is a director of Branham & Company Chartered Accountants Ltd. Laird’s primary area of interest is tax planning for private corporations and their shareholders, including restructurings, mergers, dispositions, and acquisitions. He has previously authored and presented seminars for CPABC.

SHANE M. BROWN, LLB., is a partner of Thorsteinssons LLP. Shane’s practice focuses on domestic and international tax planning for individuals, trusts, corporations and charities, including estate planning, corporate reorganizations, divisive reorganizations, business structuring, property acquisitions and offshore and cross-border structures. Shane also advises non-residents, including new immigrants to Canada, and represents clients who have disputes with the CRA. Shane is a regular lecturer for the CPABC and lectures on various aspects of taxation law and has authored and co-authored papers and articles on a variety of tax planning matters.

GREGORY BUCK, CPA, CA, BCOMM, has been in public practice for 35 years specializing in owner managed and professional business. He has extensive experience in small to medium businesses from a practical standpoint. Greg has lectured extensively at UVF in the Business Computing and Business Administration departments and for accounting and work flow software companies. Greg has authored three textbooks in the business computing area and several articles and blog.

RHONDA CALDWELL is the founder of Caldwell Communications Inc., a Vancouver based management consulting and professional development company. As a business owner with over 20 years of corporate and entrepreneurial experience, Rhonda offers real world solutions that are immediately applicable. She has provided services to organizations across North America as a consultant, training designer, classroom facilitator and coach. She focuses on giving people the skills they need to enhance their personal and team performance, and strengthen their business relationships with colleagues and clients.

GREG CAMPEAU, B.COMM, is a learner and teacher of timeless truths that govern both personal and organizational effectiveness. Greg has delivered over 2900 presentations and workshops throughout North America, and for 15 years has instructed courses in the School of Business at BCIT. Greg’s broad and riveting appeal is rooted in his relevant, meaningful, thought-provoking and practical content that is always delivered in an interactive, humorous and inspirational style.

JAMES CABOBIANO is a partner at PwC’s Vancouver practice and leads PwC’s Indirect Tax Practice for Vancouver. Specializing in Canadian indirect taxes for over 25 years, James has expertise in the Goods and Services Tax/Harmonized Sales Tax, Quebec Sales Tax, and retail sales tax relating to cross-border transactions, technology companies, life sciences companies and public sector bodies. He has also been a regular part of the faculty team for the CPA Canada In-depth GST/HST Course, and co-developed and routinely co-presents CPA Canada’s Advanced GST/HST Course for Public Sector Bodies.

LOUIS CHANG, CPA, CA holds a TESOL English Teaching Diploma, and for over 20 years has taught English to adult professionals and students at various institutions including The English Language Institute at
UBC, the YMCA, Immigration Canada, Mosaic, and other Business Language schools throughout Vancouver. He has worked in public practice in the Vancouver office of Deloitte, and for over 30 years he has owned and operated a successful business. Louis believes that the ability to speak confidently and clearly is essential for success in the accounting profession.

KEVIN CHIENG, CPA, CA, is a Senior Manager in the Assurance practice of PwC with a focus on the mining industry. Kevin has experience providing a wide range of assurance services to organizations at all stages of development from junior exploration to multi-national producing companies reporting under U.S. GAAP and IFRS. Kevin has recently returned from a two year secondment with the PwC UK firm, where he worked Rio Tinto plc and other FTSE 100 companies.

IAN CHRISTIE has devoted his career to helping mid-level and senior-level professionals develop theirs. He's built deep experience in career transitions, career growth strategies and personal branding through 20+ years in roles that have included executive recruitment, leading the MBA career centre at Sauder UBC, as a writer, speaker and career consultant. His work with CPAs includes many CFO, VP/Director Finance, Controller and public practice leadership clients. He hosts numerous online courses and publishes a weekly newsletter.

MIKE COBURN, BA(HON), LL.B., is a partner with Fasken Martineau DuMoulin LLP and a member of the firm’s tax group. He has considerable experience in structuring and implementing tax-efficient corporate reorganizations for both private and public companies. Mike also frequently advises clients on inbound and outbound cross-border investments, acquisitions and disposition of assets and disputes with various taxing authorities.

BILL COX, FCFA, FCA has been with BDO Canada LLP for over 30 years, with 25 years as partner. He has worked exclusively in the public and not-for-profit sectors dealing with financial statements audits, as well as audits of government grants and other specialized audits. For the past 4 years he has been a member of the Public Sector Accounting Board.

RUSSELL CULLINGWORTH, MBA is the founder and CEO of ProDio Audio Learning and EQ Advantage Learning and Development Inc. Russell's courses focus on improving business performance through advanced interpersonal skills. Corporate clients include the Salvation Army, Great Little Box Co., Vancouver Film School, David Suzuki Foundation, Trevor Linden Fitness, and Scouts Canada. He has over 20 years' experience in financial management, and has held executive finance positions at CGA-Canada and Canuck Place Children's Hospice. Russell has an MBA from SFU and is an Accredited Insights Discovery Licensed Practitioner.

AARON DAVIES, CPA, CGA, EA, is a Senior Manager in the Global Employer Services practice at Deloitte. He specializes in global mobility and cross-border tax issues with a focus on cross-border tax planning, Canadian and U.S. tax return compliance, global payroll and global mobility program management for multi-national organizations relocating their employees within a Canadian and U.S. context.

JOHN DEMETRIO, CPA, CA, CPA (Illinois) is a manager in the Global Employer Services practice at Deloitte LLP in Vancouver. John has over 9 years of experience in cross-border tax issues with a focus on cross-border tax planning, Canadian and U.S. tax compliance and international assignment program management and coordination for large multinational organizations.

TAMMY DEWAR combines a Ph.D. in adult learning and a professional coaching certification with 20 years of practical leadership and team development experience. She is a “pracademic”, spending part of her time teaching at Royal Roads University in their Master’s and Executive Leadership programs and the other part of her time as a facilitator and coach helping organizations develop their leadership capacity. She provides engaging, creative and practical training programs, facilitates strategic planning and innovation processes, and coaches teams and executives.

ROBIN DIEHL, CPA, CA, CBV is a business valuator and a business analyst. Robin has vast experience presenting internal and external courses, including courses for undergraduates, professional designations and private firms. She has helped author various accounting courses and composed professional examination questions. Her areas of focus include financial accounting, financial reporting and assurance topics.

DWAYNE DUECK, CPA, CA joined Tenisci Piva LLP as a tax partner in January 2014. Dwayne specializes in tax and business advisory services. This encompasses business, corporate, personal, and trust taxation and related tax planning, retirement, estate and succession planning, the purchase and sale of a business, business mergers and amalgamations, taxation on emigration from and immigration to Canada, Canadian taxation of non-residents, and corporate reorganizations. He has been a member of the Canadian Tax Foundation for 14 years and has been a tutor and facilitator for CPA Canada’s In-Depth Tax program since 2006.

TIM DUHOLKE, FCFA, FCA, TEP practiced tax exclusively for over 35 years and retired from DLA Piper (Canada) LLP in 2017. While Tim’s practice covered a broad spectrum of tax areas and industries, a great deal of his work focused on real estate activities and advising private companies and high net worth families, especially on transition and succession issues.

SHARON EDWARDS has been teaching clients how to share their expertise confidently, with passion and influence, for 15 years. She is a presentation skills coach, facilitator, and writer who fosters innovation and creativity through great communication. The theme that runs through her work is clear: becoming a great communicator is the way to get the highest return on the investment you have made in yourself, and your career. Sharon can teach you the Power of Presence.

MICHAEL ELL, FCPA, FCGA, is a Public Practitioner and Consultant. Michael was the Primary Public Practice Reviewer for CGA-BC from 1999 to 2015, is an Associate of the CPA Canada Accounting Standards Board Private Enterprise Advisory Committee, and a member of the CPA Canada Practitioners Technical Advisory Board. He develops and facilitates courses on public practice issues, accounting standards, and the CPA Canada Handbook for the accounting profession. Besides providing services to small business clients, he focuses on providing monitoring, mentoring and standards consulting to accounting firms in BC and across Canada.

ALEX FARRELL, CPA, CA, is a Senior Manager in the Assurance practice of KPMG with a focus on high tech and public companies. Alex has experience in providing a wide range of assurance services including audits, regulatory filings, and accounting advisory services to companies in the tech sector. He has 8 years of industry experience in analyzing and providing advice in regards to revenue recognition issues within both early and late stage companies of the tech sector. Alex’s experience includes working with companies reporting under U.S. GAAP, ASPE and IFRS.

DEBORAH FOLKA, APR, FCPRS, LM is a communications consultant specializing in crisis communications and issues management for over 25 years. She is also a past Director of Communications at ICABC and CMABC.

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**LAURA FRIEDRICH, MSc, FCFA, FCA** is a principal of Friedrich & Friedrich Corp, a professional research, standards, and education consultancy firm. The firm has over 15 years experience conducting projects throughout North and South America, Asia, and Eastern Europe. Major projects focus on organizational structure, program construction, and evaluating, designing and advising on best practices in competency-based education and experience assessments. Laura has led more than 150 professional development sessions in a wide range of topic areas including governance, leadership, ethics, project management, curriculum and exam development, and IFRS and ISAs.

**LEE-LYNN GAN, CPA, CA** is a senior manager at KPMG, where she specializes in tax planning and consulting for Canadian corporations and their shareholders. KPMG's National Tax Group also relies on Lee-Lynn's technical expertise on a variety of Canadian tax issues. Lee-Lynn recently co-authored and presented a paper on recent tax cases of interest for the Canadian Tax Foundation's 2015 BC Tax Conference. She was a contributing author to Understanding Section 55 and Butterfly Reorganizations, 3rd Edition, and co-author of "Ending the Year Ending after the End of the Year" at the 2011 BC Tax Conference.

**ROB GILFOYLE** is an expert on the effect that business technology is having on working practices, and on what leaders in organizations have to do differently and more of, to leverage the opportunities that new technology provides. Rob has substantial practical experience of leading change initiatives in North America, Europe, and Africa, including Fortune 500 companies. He regularly provides highly-rated PD seminars on change leadership to CPAs in BC, Alberta, and Saskatchewan. All of Rob's presentations are highly interactive and feature very usable leadership tools and techniques.

**RANDEL HAY, CPA, CA, FCA** is a Partner at Deloitte LLP. He is a leader in the Global R&D and Government Incentives practice. Joanne is based in Vancouver and manages SR&ED engagements in all industries, focusing on manufacturing and processing and software claims. She has 30 years of experience in tax and is recognized as a national expert on the topic of R&D, innovation and productivity.

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**BRAD HALL, CPA, CA, CBV** is a Senior Manager with Grant Thornton in Kelowna, BC. Since joining Grant Thornton in 2006 he has practiced in Ontario, B.C, and Australia in the Assurance and Corporate Finance service lines. Brad practices full-time in Grant Thornton’s Business Valuation group and serves the Interior B.C. region focusing on owner-managed business across a broad spectrum of industries. Brad is experienced in delivering presentations internally and externally, as well as being involved in the education process with BCCPA, the ICABC, and the CICBV.

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**RANDALL A HAY, CPA, CA, MBA, FCA** "unretired" recently to assist small firm practitioners in the Lower Mainland. Randall advises their family owned enterprise clients on Canadian corporate tax planning matters - corporate reorganizations, succession and estate planning - including calculating share value for tax planning purposes. Randall was formerly a senior Regional Tax partner with a national CA firm sitting on both of the firm’s Tax Executive and Tax Initiatives Planning committees. Randall was also an instructor of various tax courses at UVF in the BBA degree program for over 18 years.

**CHARLOTTE HOGGARD, CPA, CMA, CGA, CIT** is President of T. Charlotte Hoggard Inc, Vancouver Island, and has been dealing with sales tax issues, including GST, since 1990. Her involvement started with CRA and in 1999 she left to continue helping clients with the sales tax in public practice. She assists clients with the various implications of sales tax, including GST, HST and PST, both on an advisory and practical basis, such as representing them to CRA. Charlotte has been a member of the board of various non-profit and charitable organizations.

**MARGARET HOPE, M.Ed.,** has been providing education programs for accounting professionals since 1988. She has a Masters Degree in Education, is an Internationally Accredited Professional Speaker – one of fewer than 85 speakers ever accredited worldwide, and the author of You’re Speaking – But Are You Connecting? Margaret is an Adjunct Professor at SFU, teaches at several other Canadian universities and for a variety of business and association clients. In addition to public
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TAMARA HUNTER, LL.B., is a member of DLA Piper’s litigation group. She practises in the areas of freedom of information and privacy law, administrative law and professional regulation law. She acts for a variety of professional regulatory bodies on matters involving registration, professional disciplinary proceedings and related litigation, representing both private sector and public sector organizations. Tamara has been named by the Office of the Information and Privacy Commissioner for British Columbia as a qualified lawyer approved to act on its behalf in matters relating to privacy protection law, administrative law and access to information law.

CHRIS IRELAND, B.COM, CPA, CA, TEP, is Senior Vice-President, Planning Services with responsibility for PPI Advisory’s national planning services team which provides advanced professional expertise and support in financial, estate and succession planning. He joined PPI in 2003 with over 20 years of experience in tax, estate and trust planning including several years as a Tax Partner in the Vancouver office of an international accounting firm. Chris has taught CPA Canada’s specialized tax course, “Advanced Tax Issues for the Owner Managed Business” and has written extensively in the area of tax planning and wealth preservation.

DR. SHAWN IRELAND, M.S.C., MA, ED.D, is the lead consultant and managing director of HRCgroup, inc. Dr. Ireland’s areas of subject matter expertise include action-learning initiatives in support of leading strategic change, management of virtual teams, project leadership, fostering critical thinking, communications, and managing human behaviour. He has worked extensively with international Fortune 500 companies. His book publications include “IFRAME: A Manager's Guide to Critically Balanced Thinking” with his co-author Lorne Kelton, and “Virtual Teams - Seven Steps to Successful Virtual Teamwork”. He has written numerous articles for professional journals and publications.

PETER JACKSON, CPA, CA, is a Senior Manager with KPMG LLP in Vancouver and specializes in servicing Canadian and United States public and private companies. He also works in their Advisory group and has extensive knowledge of IFRS, PSAB, ASPE and US GAAP and securities rules and regulations.

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ALEEM JINNAH, CPA, CA, CBV is a sell-side M&A advisor with Deloitte Corporate Finance Inc. As part of Deloitte’s Corporate Finance team, Aleem provides business owners and corporate directors with M&A advisory services focused on business divestitures. Aleem assists in the negotiation of transaction price and terms, provides vendor due diligence, and markets businesses to qualified financial and strategic buyers. Aleem’s background includes due diligence for acquisitions, business valuations, and audit and assurance.

DR. VIJAY JOG is the Founder-President of Corporate Renaissance Group, a firm dedicated to driving better business management and performance. He has led CRG’s growth in areas of corporate dashboards, business intelligence, bridging the gap between technology, HR and finance, designing incentive systems and conceptualizing and creating innovative software applications that are used by thousands of organizations around the world. He is also the Chancellor Professor of Finance at the Sprott School of Business, Carleton University and has many awards and recognition for his research and teaching.

DUNCAN KENT, BA, MA, has been a professional technical writer and trainer for more than four decades. Duncan Kent & Associates Ltd. has completed hundreds of documentation projects for a wide array of clients in almost every industry and for most levels of government. He is a founding member and past President of the Canada West Coast chapter of the Society for Technical Communication. For 30 years, Duncan also taught technical writing at Simon Fraser University, and for 7 years (2010-2016) taught business writing at UBC’s Sauder School of Business.

ED KROFT, Q.C., CPA (Hon.), is a partner of Blake Cassels & Graydon LLP. Ed resolves tax disputes and conducts tax litigation. He is recognized as a top tax advisor in international guides and directories. Ed was the recipient of Canadian Tax Foundation’s first annual Lifetime Contribution Award and was also awarded the Queen Elizabeth II Diamond Jubilee Medal to recognize contributions to the Canadian Tax Foundation. He is also the recipient of the 2006 CICA Award for Excellence in Income Tax Practice and Education for outstanding contribution to the profession and the Canadian tax community.

KEN LALOGE, CPA, CA, of Crowe MacKay LLP in Kelowna, is an incorporated tax partner, providing tax and business consulting services to a wide range of businesses, primarily CPAs in public practice and owner-managers including advice on business purchases, sales, corporate structuring, succession, trusts, tax appeals and tax planning. Ken has frequently presented CPABC and CPA Canada Tax Courses, the National Conference on Income Taxes, and currently serves on both the Council of the Association of Professional Engineers and Geoscientists of BC and the CPA Canada Small & Medium Practitioners Tax Committee.

DENISE LAMMI, CPA, CA has been professionally involved with income tax matters for over 25 years. She specializes in Canadian income taxation with an emphasis on all matters relevant to owner-manager businesses. She lectures extensively on income tax matters while authoring and mentoring numerous taxation related professional development courses and seminars.

ELVIN LAW, CPA, CGA is a Tax Manager and provides Canadian personal and corporate tax services to a wide variety of clients but focuses on technology, health & wellness, retail, and owner-managed businesses. His reach is in providing strategic tax planning, while helping businesses and start-ups in Kelowna (and beyond) experience growth and profits.

BENITA LOUGHLIN, CPA, CA, is a Tax Partner in KPMG LLP’s Global Mobility Services group. Benita practices in the area of tax planning and compliance for individuals, estates and trusts in a US and cross-border context. She advises individuals on both sides of the border on tax matters related to their residence, compensation including equity compensation, investments, retirement plans, estates, trusts, gifts
and expatriation. Benita has authored and taught several courses for CPABC, and is a frequent speaker on cross-border tax planning topics.

**LINDA LUCAS, CPA, CMA** is Chief Executive Officer at Roper Greyell LLP. Employment + Labour Lawyers. Linda has twenty years of experience in all aspects of finance and operations, and has worked in many different industries across Canada, United Kingdom, Cayman Islands and the Bahamas. Linda’s experience includes organizations experiencing significant growth, multiple locations & services, and diverse client bases. Her strategic focus and leadership skills will continue to enhance Roper Greyell’s ability to lead and develop and one of Canada’s top boutique labour and employment firms.

**HAYLEY MASCHEK** is a Sole Practitioner of Roper Greyell LLP. She has expertise in Corporate, Business, Corporate, and Securities Law, and provides monitoring, EQCR and other services to practitioners. Hayley also works with privately owned businesses, assisting clients with trust and estate planning and tax-efficient charitable gifting. Hayley is a practising member of the Law Society of British Columbia. She is also a member of the Canadian Tax Foundation and the Canadian Bar Association.

**DIANE E. MCDONALD, CPA, CA** is a sole practitioner and has been in public practice for over 30 years, providing consulting, monitoring and professional practice services throughout B.C. Diane assists companies and practitioners with Canadian and SEC financial reporting obligations and provides accounting and financial reporting consultation services on the application of IFRS, ASPE, ASNIPO and U.S. GAAP. She develops and provides professional development for preparers of financial statements, their auditors or accountants and provides monitoring, EQCR and other services to practitioners.

**CODY MCMULLIN, CPA, CA, CFA** is an Associate Investment Counsellor, based in Victoria. Cody works with high net worth individuals, families, businesses, foundations and trusts to build customized discretionary portfolio management solutions designed to give his clients’ peace of mind so they can focus on what is most important to them. Before moving to the investment industry, Cody worked at one of Canada’s largest national accounting firms providing assurance services to public and private corporations in the insurance and investment management industries.

**LESLEY-ANN MARRIOTT, PCC, CEC** holds the advanced credential of Professional Executive Coach. As a former executive, she developed her skills in the competitive world of the big box retail business at the senior leadership table. She has invested thousands of hours coaching senior leaders and teams, many of whom are professional accountants. Described as “edgy and fun”, her sessions are highly interactive and entertaining. Lesley-Ann is Principal at Marriott Group Management, Associate Faculty at Royal Roads University – Executive Coaching Program, Faculty for CPAs Executive Leadership Program and Senior Associate of Personal Strengths Canada – Core Strengths.

**LESLY ANN MARRIOTT, PCC, CEC** holds the advanced credential of Professional Executive Coach. As a former executive, she developed her skills in the competitive world of the big box retail business at the senior leadership table. She has invested thousands of hours coaching senior leaders and teams, many of whom are professional accountants. Described as “edgy and fun”, her sessions are highly interactive and entertaining. Lesley-Ann is Principal at Marriott Group Management, Associate Faculty at Royal Roads University – Executive Coaching Program, Faculty for CPAs Executive Leadership Program and Senior Associate of Personal Strengths Canada – Core Strengths.

**GAVIN MARSHALL, BA (Hons), LL.B.** is focused on providing strategic human resources and employment advice to clients. He has a broad range of knowledge in the areas of employment and labour law, wrongful dismissal and contract disputes, enforcement of restrictive covenants, labour relations law and picketing issues. Gavin is an active member of HRMA and a frequent speaker in legal education for various professional organizations. He is the author of the BC Employment Standards Act: Quick Reference, and has been recognized as a leading employment and labour lawyer in Who’s Who Legal, 2016.

**KEITH MARTIN, CPA, CA, MBA** obtained his professional designation in 1990 and practiced in the area of Recovery and Insolvency Services until 1998. Keith moved to industry as Chief Financial Officer of a growing contracting firm, where his time and efforts were equally applied to all aspects of the business, including HR, strategic planning and operations. In January 2011, Keith established H+M Advisors, a business advisory practice focusing on providing critical business planning and system development for entrepreneurs and their growing companies. Keith’s style of presentation is well received by all participants.

**ROGER MERKOSKY, CPA, CA** is a Principal of a consulting firm and a Professor with the University of Victoria Gustavson School of Business, with over 20 years of teaching experience. She has worked in Finance and Accounting since 1986 and has experience in a wide variety of industries, including audio technology, airlines and aviation, not-for-profit, public accounting, marine transportation, fisheries monitoring, gaming and other technology arenas. She has worked for both private and public companies, has participated in raising over $50M in funds, and has experience in international initiatives.

**THE MARQUEE GROUP** is the leading Canadian provider of financial modeling training programs at financial institutions, corporations, universities and professional societies. Since 2002, The Marquee Group has provided financial professionals with the tools they need to understand and master critical areas of financial modeling, valuation and analysis. The firm’s partners are Ian Schnoor, Tim Benson, Dave Thomas and Jon Zelman. They have led courses in Canada, the United States, the United Kingdom, Australia and Mexico. They each have significant experience working in capital markets and a passion for teaching.

**LESLEY-ANN MARRIOTT, PCC, CEC** holds the advanced credential of Professional Executive Coach. As a former executive, she developed her skills in the competitive world of the big box retail business at the senior leadership table. She has invested thousands of hours coaching senior leaders and teams, many of whom are professional accountants. Described as “edgy and fun”, her sessions are highly interactive and entertaining. Lesley-Ann is Principal at Marriott Group Management, Associate Faculty at Royal Roads University – Executive Coaching Program, Faculty for CPAs Executive Leadership Program and Senior Associate of Personal Strengths Canada – Core Strengths.

**GAVIN MARSHALL, BA (Hons), LL.B.** is focused on providing strategic human resources and employment advice to clients. He has a broad range of knowledge in the areas of employment and labour law, wrongful dismissal and contract disputes, enforcement of restrictive covenants, labour relations law and picketing issues. Gavin is an active member of HRMA and a frequent speaker in legal education for various professional organizations. He is the author of the BC Employment Standards Act: Quick Reference, and has been recognized as a leading employment and labour lawyer in Who’s Who Legal, 2016.

**KEITH MARTIN, CPA, CA, MBA** obtained his professional designation in 1990 and practiced in the area of Recovery and Insolvency Services until 1998. Keith moved to industry as Chief Financial Officer of a growing contracting firm, where his time and efforts were equally applied to all aspects of the business, including HR, strategic planning and operations. In January 2011, Keith established H+M Advisors, a business advisory practice focusing on providing critical business planning and system development for entrepreneurs and their growing companies. Keith’s style of presentation is well received by all participants.

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SEMINAR LEADERS

CHRISTINE MUCKLE, JD, is a lawyer at Legacy Tax + Trust Lawyers where she practices in the area of estate planning, trust and estate administration, and related tax matters, with a focus on cross border U.S.-Canada planning. Christine also advises U.S. citizens and green card holders with respect to U.S. expatriation tax rules and U.S. tax compliance issues. Christine has completed Parts I, II and III of the CPA Canada In-Depth Tax Course.

DR. JIM MURRAY is CEO of optimal solutions international, a firm dedicated to helping people and organizations achieve their full potential. Jim has created and taught courses for CPABC since 1982. He holds four degrees, is the architect of several advanced executive development programs for four provincial CPA bodies, has published three best-selling books and provided strategic counsel to over 600 organizations. He has been nationally honoured by the university community and his courses formally recognized for "excellence in innovation and design.

ROBERT MURRAY has spoken professionally to audiences in over 25 countries around the world on creating Customer Centric Cultures, Strategy, Transformation and Leadership. He is the Amazon Number 1 Best Selling Author of the critically acclaimed books on leadership, strategy and innovation. He is a founding member of FinEx Group, his clients include a full range of organizations across all industries in North America and South America.

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GUYNASMYTH, Ph.D., is a dynamic, informed, and thought-provoking trainer and speaker. His lively and interactive workshops and presentations help participants to understand and work with the art and science of excellent leadership. Guy’s focus reflects his comprehensive understanding of human development and organizational systems. A combination of neuroscience, complexity theory, and psychology underscores his highly accessible and relevant presentations. Guy works with both public and private sector clients and practices globally. He is a faculty member for graduate programs at Royal Roads University and the University of Victoria.

BRIDGET NOONAN, CPA, CA is an assurance partner at and co-founder of Clearline Consulting. Bridget was with a mid-size accounting firm for 12 years in the audit and assurance practice, while managing internal training and firm development. She moved into a professional standards adviser role at CPA BC where she supported and assisted practitioners. Bridget now focuses on the provision of assurance services to private and not-for-profit organizations, and consulting services to small and mid-size firms in the areas of regulatory and standards compliance, post-practice inspection requirements, monitoring, in-house training and efficiency projects.

SHANE ONUFRECHUK, FCFA, FCA, is a Partner, Tax at KPMG LLP. Shane’s focus is the firm is in the area of Canadian Corporate Tax with an emphasis on PPP project finance structuring, corporate reorganizations, acquisitions and providing tax advisory services to other professionals. Shane speaks at CPABC PD events, plays an active role in CPABC professional development, and was involved in teaching and course development for the CPA Western School of Business as well as the Sauder School of Business.

TREVOR O’REILLY, CFA, is an Investment Counsellor with RBC PH&N Investment Counsel, where he manages discretionary investment portfolios for high net worth individuals, families, businesses, and not-for-profit organizations. He has been in the investment industry since 2007, most recently at PH&N Investment Management as an Institutional Portfolio Manager working with pension plans, university endowments and not-for-profit organizations, focusing on equity and balanced investment portfolios. Trevor holds a Bachelor of Commerce in Entrepreneurship from Royal Roads University, the Chartered Financial Analyst designation, and is a member of the CFA Institute and CFA Society Vancouver.

MASSOOD OROOMCHI specializes in the design and implementation of internal control programs, best practices for corporate governance, enterprise-wide risk assessment, and finance process optimization including accelerated close and spreadsheet controls. He has developed a comprehensive top-down, risk-based Internal Control Solution that can easily be customized to any size firm. He provides customized on-site training in governance, risk and controls for all forms of organizations resulting in significant savings in training costs. As a founding member of FinEx Group, his clients include a full range of organizations across all industries in North America and South America.

RON OSBORNE, CPA, CA, has nearly 40 years experience in public practice including over 25 years dealing specifically with commodity taxation matters. He has developed and taught numerous GST/HST & PST courses. His practice is focused on the provision of GST/HST and sales tax advice to other practitioners and their clients. Ron is also a member of the CPABC Taxation Forum.

MARK OSTRY, CPA, CGA, has worked in public practice since 1983. Early in 2002 Mark established a sole proprietorship in Westbank. He has experience in all levels of public practice, largely serving small-to-medium-sized enterprises. Mark has presented a variety of professional development courses over the years, including practice management, ethics and taxation.

JIM C. OTAR, CFP, BASC, MENG, is a certified financial planner, financial writer, market technician and a professional engineer. He is the author of several books, the latest one is "Unveiling the Retirement Myth - Advanced Retirement Planning based on Market History". His articles are published in various magazines in Canada, U.S. and Australia. He won the prestigious CFP-Board Award in 2001 and 2002 for his articles, the first Canadian to win such a prestigious award.

JOHN PAGE CPA, CA directed all aspects of the Ethics program at TELUS Corporation for over 11 years. He led policy development, initiated training programs and the hot line, and reported to the Board of Directors and to external stakeholders. He has broad experience of applying ethical principles to organizational leadership, financial and risk management, and not for profit Board governance. He is currently an executive and organizational coach and a graduate of the UBC Certificate in Organizational Coaching.

MARK PATTERSON, CPA, CA, is a Partner in the Assurance practice of PwC Vancouver and has been with the firm for over 17 years. Mark’s practice is focused on the mining sector. He has extensive experience working with public companies in the industry at all stages of development from junior exploration to major international mining companies. Mark’s experience includes working with companies reporting under U.S. GAAP and IFRS and those undertaking significant acquisition, debt and equity financing transactions.

PAM PENNER has extensive experience working in the field of conflict resolution as a mediator, facilitator, coach and trainer. In private practice since 1998, and as a member of the instructional team at the Justice Institute of B.C., she specializes in helping individuals develop their communication and conflict resolution skills. As a coach, she works with individuals to manage the conflict within, tap into their resourcefulness, and achieve personal goals.
SCOTT POWELL, CPA, CA is a Chartered Professional Accountant and a UK Chartered Accountant. Scott is an Adjunct Professor with Simon Fraser University’s Business School and is President of MDA Training. He has written and delivered finance workshops around the world for numerous corporate and banking clients. Scott holds an honours degree in Politics/Economics from Trent University and a master’s degree in Economics from Cambridge University.

MARY POWER, CPA, CA, is principal of M.V. Power Inc., and has over 30 years of experience exclusively in taxation. She has published papers in taxation, has spoken at the BC Tax Conference and has been teaching taxation courses since 1982.

STEPHEN PRIDDLE, CPA, CA, CMA is Vice-President, Finance and CFO of SureWx Inc. Stephen worked with KPMG, before working for several different companies prior to joining SureWx. He has gained a wide range of financial reporting, treasury management, mergers & acquisition and other experience. Stephen leads seminars for controllers and CFOs across Canada, has taught in professional and university programs and is a prolific author of published case studies. He advises a number of businesses and not-for-profit organizations, and sits on the Board of SureWx.

PAM PRIOR, CPA, CA, TEP is a Partner with KPMG Enterprise™. Pam has been practicing tax with KPMG since 1990. Pam’s areas of focus include assisting private company clients with their estate and will planning, establishment of family trusts and tax-efficient charitable gifting. She also assists not-for-profits and charities with their tax filings, charitable receipting issues and structuring planned gifts. She has spoken and written papers on various tax matters for the BC Tax Foundation, STEP, PBLI as well as CPA Canada and BC.

KEN PULIS, FCPA, FCMA, is the president of Excelguru Consulting Inc, a company dedicated to leveraging over 20 years of corporate accounting and IT experience to help users get the most out of Microsoft Excel and Power BI. Ken has been an active participant in many Web forums since 2002, and hosts his own website, blog and free help forums. In recognition of his online community contributions, Microsoft has awarded Ken the prestigious Microsoft MVP award every year since 2006.

ERIN RAO, CPA, CA, is a consultant, specializing in IFRS, principal of Quality Questions, and teaches financial accounting at the University of British Columbia. Erin has developed and presented IFRS courses, and authored many finance and accounting course materials and business cases. In addition, Erin provides financial reporting and technical accounting consulting to organizations. Prior to this, Erin was a Vice President at ABN AMRO Bank NV in Amsterdam, the Netherlands where she was a project manager on a global team responsible for implementing IFRS.

TAMMY ROBERTSON, MA, has over 25 years of experience working with CPAs from BC to NL, providing leadership and personal development seminars and keynotes at conferences and training days. As a life and leadership coach to leaders both in industry and public practice, author and professional speaker, Tammy inspires and challenges you to step into your true potential. Tammy believes that the essence of our challenge today is captured in one simple message, Get Your Heart in the Game™ - be resilient, be confident, step up, tune in and have faith!

WENDY ROYLE, CPA, CA instructs ethics courses for professional accountants, and has taught audit courses, the Branch Managers Qualifying Course for securities licensing through the Canadian Bankers Institute, and was the Canadian facilitator for the North American Securities Administrators annual Investment Advisor Auditor training in the U.S. for three years. Wendy has spent her career in regulatory roles, primarily in securities as Chief Examiner at the BCSC, VP Pacific of the Mutual Fund Dealers Association, and Senior Director Regulatory Affairs at ICABC.

BENJAMIN SALOPEK, B.Comm (Hons) is Vice President in the Vancouver Corporate Finance group at Deloitte. He specializes in the delivery of strategic advice to clients engaging in financings, acquisitions, mergers, divestitures and restructurings. Benjamin has extensive experience advising across a wide spectrum of sectors. Prior to joining Deloitte, Benjamin worked at a leading Canadian private equity firm with offices in Toronto and Vancouver. He also previously worked in the global investment banking division (IBD) of RBC Capital Markets. Benjamin obtained his B.Comm, Honours, from Sauder School of Business at the University of British Columbia.

BRIAN SANDERS, CPA, CA, is a Partner with Crowe MacKay LLP’s tax group in Kelowna. Brian provides tax services, including assistance with purchase and sale of businesses, corporate reorganizations, and corporate and personal tax planning to a wide range of businesses and professionals with a concentration on owner-managed business. He is an active member of the community and is involved in service and charitable organizations.

JOEL SHAPIRO, Ph.D., is an international coach, facilitator, and leadership educator specializing in employee engagement, change, coaching, collaborative practice, and organizational culture. Joel has educated thousands of leaders around the world, and is passionate about making employees part of the solution, building authentic community at work, and aligning culture with strategy. Prior to founding Advanture Consulting, Joel helped save his third generation family business in an extreme turnaround situation; earned a Ph.D. with Distinction in Philosophy; and was a member of the Canadian National Freestyle Ski Team.

JEFFREY D. SHERMAN, MBA, CIM, FCPA, FCA (Ontario), is chief financial officer of Atrium Mortgage Investment Corporation (TSX: AI) and has over 20 years experience as a corporate director and executive in high tech, biotechnology/medical, financial services, and business services. He is a popular presenter, a frequent course director and course author for many organizations, and presents executive development programs and one-day seminars for many provincial Chartered Professional Accountants bodies across Canada. He has written over twenty books including Strategy and Planning Toolkit for Small and Medium Businesses (published by CPA Canada).

TERRY SMALL, B.Ed., M.A., is a master teacher and Canada’s leading learning skills specialist. He is the author of the Brain Bulletin with over 30,000 subscribers worldwide. Terry has presented on the brain for over 33 years to organizations around the world. His knowledge, warmth, humour and dynamic presentation style have made him a much sought-after speaker at workshops and conferences. Terry often appears on TV, radio, and in the press. He recently appeared on BCTV, Global, CKNW and Student Success. His presentations are practical and based on the latest brain science.

GRANT T. SMITH, CPA, CA is a senior partner at Clearline, a CPA practice with offices in Vancouver, Surrey and North Vancouver. Prior to starting with Clearline Grant earned experience at both mid-size and large accounting firms in Vancouver. His primary efforts at Clearline are three fold: working for clarity with the firm staff to develop insightful thinking practitioners; leading professionals and entrepreneurs to implement strategy that make their journey meaningful and successful; and supporting TSX Venture companies to provide clear and meaningful IFRS reporting with confidence.
A.G. (SANDY) STEDMAN, CPA, CA, has been a partner with Schibli Stedman King in Victoria since 1996. Prior to joining SSK, Sandy’s career included, internal audit, controllship, and a range of public practice experience. He has been a course author and instructor for the ICABC/CPABC and other provincial professional accounting bodies since 2002. His practice includes accounting and tax advice for professionals, owner managed business, high net worth individuals, and groups of privately held companies.

MIKE STUBBING, CPA, CA, CFP, TEP is a tax partner with Grant Thornton LLP in Victoria. His practice focuses on providing tax advice to owner-managed businesses.

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BRIAN SZABO, CPA, CA, is a Partner with KPMG LLP focused on providing auditing and advisory services to public sector organizations including municipalities, colleges and universities, health authorities and school boards, as well as numerous not-for-profit organizations. He also provides auditing services to private companies, primarily in the real estate sector. Brian is a member of the CPABC PD Advisory Committee for Accounting and Audit and the Not-for-Profit Advisory Committee to the Accounting Standards Board. He is also involved in KPMG’s in-house training program and is Director and Executive Committee Member of the North Vancouver Chamber of Commerce.

FRED TANG, CPA, CA, CBV, is an experienced valuation and financial advisory professional providing services in the practice areas of business and securities valuations, M&A and divestitures, transaction support, due diligence services and litigation support. He is qualified as an expert witness and has provided expert testimony in the Supreme Court of British Columbia. Fred provides his advisory services to clients in his role as a Senior Manager, Financial Advisory Services at BDO Canada LLP and is based in its Vancouver office.

NATHAN A. TASH, CPA, CFA, has worked in public practice for over 15 years and is a partner at Tash Pearson & Associates in North Vancouver. Nathan has extensive experience in providing a wide range of accounting, tax, business advisory and compliance services to owner-managed businesses, professional corporations and individuals throughout Canada. Nathan has been a CPABC public practice/Practice Management course instructor for over 5 years. Nathan is also an active member (Steering Committee) of the CPABC Small Firm Forum and the Accounting and Assurance PD Advisory Group Committee.

ANDREW TAYLOR, CPA, CA, is principal of Andrew C. Taylor Inc, Chartered Professional Accountant, a Richmond based CPA firm practising exclusively in the area of taxation. He specializes in corporate reorganizations, purchase and sale of businesses and estate planning and has been a frequent lecturer and instructor for ICABC and CPABC for many years.

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TRACY THEENES, MA, CFP, FCSL, FIDS, is Financial Advisor and co-founder of Sophia Financial Group, Raymond James. Prior to that, Tracy worked as a financial consultant with Smith Barney, a US brokerage firm and after returning to Canada was an advisor with a large bank owned investment firm. She has an M.A. in Counselling Psychology and is a Certified Financial Planner, insurance licensed and a Fellow of the Canadian Securities Institute. Tracy was recently awarded the International Alliance of Women Global 100 Award for her work in empowering women through education.

DAVID C. THOMPSON, B.COM., LL.B., TEP, is a partner with Thorsteinssons LLP, Tax Lawyers. He has practiced exclusively in taxation matters since 1985, and is a registered trust and estate practitioner certified by the Society of Trust and Estate Practitioners. He was a governor of the Canadian Tax Foundation. Dave is noted as a leading Canadian tax lawyer based on peer-review ratings in Lexpert and in Martindale-Hubbell. He is noted as a leading Canadian tax lawyer and a leading Canadian trust and estate lawyer based on peer-review ratings in The Best Lawyers in Canada.

TAMMY TOWILL, MBA, FCPA, FCMA is a partner in the Cordura Group and faculty with Capilano University, providing business and financial advisory services and related education and training programs to communities and organizations seeking growth or change. For over 20 years, Tammy has worked with private and public sector companies throughout North America and Europe, providing education, training and facilitating in the areas of leadership, strategy, business planning and curriculum development and implementation. She has served on and worked with several boards in Canada and the U.S.

DAVID TRAHAIR, CPA, CA, is a financial trainer, national best-selling author and CPA Magazine columnist. His books include Smoke and Mirrors, Enough Bull, Crushing Debt, Cash Cows, Pigs and Jackpots and his latest The Procrastinator’s Guide to Retirement. Canadians appreciate the fact that his views are totally independent because he does not sell any financial products. He currently operates his own personal finance training firm and offers seminars on his books to organizations including CPA provincial institutes in B.C., Alberta, Saskatchewan, Manitoba, Nova Scotia, Newfoundland, Ontario and Bermuda.

BON TRATHEN, CPA, CA, is a senior associate with MDA Training Inc. She has over 20 years of industry and finance experience helping business leaders understand the financial impacts of their decisions. She is an enthusiastic public speaker and has significant experience teaching for a professional audience within the energy sector. Prior to joining MDA Training, Bon ran a finance initiative education program within a large energy company that included both technical and leadership skills. Bon also holds a Bachelor of Commerce (Honours) from the University of Guelph.

SHAWN TRYON, LL.B., practices tax law at Thorsteinssons LLP in Vancouver. Shawn’s practice focuses on tax planning for individuals, trusts and corporations in both domestic and international matters, including: estate planning, corporate reorganizations and business structuring. Shawn also deals extensively with tax litigation matters from the audit stage through to the appeal stage. Shawn received a BA in 2000 from SFU, an LLB in 2004 from UBC and was called to the British Columbia Bar in 2005. Shawn is a member of the Canadian Tax Foundation and the Canadian Bar Association.

NCT SANGARAKIS is Principal at Kwela Leadership & Talent Management. Nct’s extensive human resources expertise includes strategic planning, design and delivery of leadership and management development programs, design and implementation of performance management...
systems, implementing self-directed teams, and facilitating team building sessions. Nic also has experience in operations management and has implemented total quality management systems and business process re-engineering. Nic has an honours degree in Industrial Psychology, and a Masters degree in Operations Management from the University of Cape Town, South Africa.

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Garrett Wasny, MA, CMC, CITP/FTIP, is an award-winning Internet speaker, author, professional development technologist and former management consultant for Price Waterhouse. He’s published three books, written hundreds of articles and columns on Internet strategy, and delivered more than 1,000 seminars and webinars to CPAs and accounting organizations worldwide on how to thrive online using the latest search, productivity, mobile and social tools.

Marion Williams, a Senior Associate with K2 Enterprises Canada since 2009, provides consulting and training services throughout Canada. With a background in the insurance industry, Marion earned the FLMI designation with a specialty in Information Systems. As the owner of a computer consulting company in Ontario for over twenty years, Marion develops custom databases for a variety of business sectors, using Access, Excel and VBA. In addition, Marion specializes in training all the Microsoft Office products at an advanced level.

Jonathan Wong, CPA, CA is a Senior Manager in KPMG’s Financial Services audit practice in Vancouver. He has more than 9 years of experience of providing audit, accounting and advisory services in the financial services industry with clients in the credit union and banking industry segment. Jonathan is a Financial Instruments and Derivatives Specialist with vast experience with derivatives, hedging, securitization and financial instruments accounting. He was significantly involved in assisting financial services clients adopt the IAS 39 Financial Instruments on transition to IFRS and more recently with transition to IFRS 9.

Alex Wray has over 25 years of experience as a trusted advisor, coach and facilitator of top teams and leaders throughout North America, and globally from Singapore to Switzerland. Alex has a passion to connect the science of habit change with the real-world context of performance. Central to his approach is the work of ground-breaking Harvard University Professors Bob Kegan and Lisa Lahey, and the phenomenon they describe as the Immunity to Change™. Alex has completed their highest level of certification.

Jonathan Wright, JD established Wright Legal, a tax, trusts and business law firm, in July of 2015. Prior to establishing Wright Legal, Jonathan worked in the tax department of a large Vancouver firm. He received both his J.D. and his undergraduate degree from the University of British Columbia, and was called to the bar in 2013. Jonathan has completed all three Parts of the CPA In-Depth Tax Course and is a member of the Canadian Tax Foundation, the Law Society of British Columbia and the Canadian Bar Association.

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Name: ____________________________

Company: ____________________________

Address: ____________________________

Country: ____________________________

City: ____________________________

Province: ____________________________

Postal Code: ____________________________

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Dear Members,

Welcome to our Fall 2017/Winter 2018 PD Program.

CPABC’s Professional Development Team is excited to present another lineup of courses and programs that cover a wide variety of technical and enabling topics to meet the needs of our diverse membership. Our Fall 2017/Winter 2018 Program offers close to 220 different seminar titles in total, with sessions held across 13 cities in the province. Along with 27 new titles, we are also introducing two new partners in online learning - Corporate Finance Institute and ProDio Academy - whose lineup of web-based seminars will grow our inventory of online offerings.

An exciting development for us beginning this fall is the rebranding of our PD Conference Days to PD Nexus. Now a staple in CPABC’s PD program, our conference days have been consistently well attended and rate for being able to deliver a variety of topics in a concise, timely, and convenient format. Our new brand – PD Nexus – is intended to leverage the meaning of the word “connection”. The Nexus days will be focused on helping members build connections to new knowledge and linkages to new themes, and creating environments where they can network and learn from their peers. Our upcoming lineup of PD Nexus includes:

- Public Practice Insights (formerly Practitioners’ Potluck) – page 140
- Financial Planning Insights – page 140
- Business Insights (formerly Members in Business & Industry PD Day) - page 139
- Beyond Financial Reporting Insights – page 139

We also continue to provide courses that help members meet their ethics requirements, and have introduced new 4-hour ethics titles into our inventory. Please see page 5 for courses that contain ethics content, and page 24 for information on CPD reporting requirements.

Remember to take advantage of our PD Passports to maximize your savings (see page 21), and register early to ensure your spot in courses that you are interested in attending.

We hope you will find courses that are beneficial and of interest to you in our upcoming program, and we thank you for choosing CPABC’s PD Program as your source for professional development.

Your CPABC PD Team.

PD SEMINAR TERMS & CONDITIONS

REGISTRATION AND TESTS: To register, complete and return the registration form with payment to the CPABC PD Department. Payment of seminar fees are due at the time of registration, as we do not invoice for seminar registrations. Cheques should be made payable to CPABC. We also accept Visa and Mastercard, but please DO NOT include your credit card information in any email correspondence. All registrations are subject to GST regardless of employer or employee status.

CONFIRMATION NOTICES: A confirmation notice will be emailed to the registrant within 1 business day upon receipt of registration. Online registrations should generate a confirmation immediately after the transaction was processed successfully. If you do not receive your confirmation prior to the course date, please contact the PD Department. The confirmation notice is provided as a courtesy – all assessments apply whether or not a registrant receives a confirmation notice.

SEMINAR LOCATIONS AND DATES: Seminar locations and dates are subject to change. Every effort is made to ensure that current information is available. Please check the PD website at pd.cpabc.ca for the latest information on the status of seminars.

SEMINAR REGISTRATION CANCELLATIONS, TRANSFERS & REFUNDS: All cancellations and/or transfers must be received in writing. Telephone notifications will not be accepted. Cancellations/transfers received at least 10 calendar days prior to the seminar date will result in a full refund. Cancellations/transfers received less than 10 calendar days but more than 2 full business days prior to the seminar date are subject to an administration fee of $50 for full and half-day seminars, or $25 for executive breakfast and other 2-hour seminars. Registrants who do not show up for a seminar, and/or who do not notify CPABC PD in writing at least 2 full business days prior to the seminar date (statutory holidays are not considered business days) will be assessed the full cost of the seminar. There will be no refunds or credits in this case. For free PD seminars a ‘no-show’ fee will apply. Substitution of attendees is permitted up to and including the day of the seminar (with the exception of Personal Passport registrations, where substitutions of attendees are not permissible under any circumstances).

Special terms and conditions apply to CPABC Executive Programs. Please refer to respective program policies on our website.

SEMINAR CANCELLATIONS BY CPABC: CPABC PD may have to postpone or cancel seminars due to insufficient enrolment, in which case our liability will be limited to a refund of the registration fee. In the case of a PD Passport registration, our liability will be limited to restoring the PD Passport day used to register for the seminar – under no circumstances will the PD Passport fee itself be refunded, credited, or carried forward. Registrants will be notified by email one week prior to the seminar date if it is cancelled. Members are urged to register early to ensure adequate enrolment.

SEMINAR LATE SUBSTITUTION: In the event of a last minute scheduling problem, we reserve the right to substitute a fully qualified speaker who is not listed in the course description.

MEALS: Unless otherwise stated, lunch and coffee breaks are provided at full-day seminars, breakfast is provided only at executive breakfast seminars, and only coffee breaks (not lunch) are provided for half-day seminars. If you have allergies or special meal considerations, please let us know at the time of registration.

CASH LIST: CPABC may distribute cashlists with your name and organization name at the seminar. Should you wish to opt-out, you must email pdreg@cpabc.ca at least one week prior to the course date.

PHOTOGRAPHY: CPABC may occasionally audio record sessions or take photographs at seminars. Recordings and images may be edited and distributed in educational and promotional products.

WEB-BASED SEMINAR TERMS & CONDITIONS

The registration fees for web-based seminars are payable at the time of registration. CPABC reserves the right to cancel seminars with insufficient enrolment. In such cases, a full refund will be made. Once a registrant receives their Login ID and Password to the web-based seminar, no refunds or substitutions will be granted.

PD PASSPORT TERMS & CONDITIONS

GENERAL CONDITIONS APPLYING TO ALL PD PASSPORTS

All 2017-2018 PD Passports are valid on CPABC PD passport valid seminars offered by CPABC between January 1, 2017 to August 31, 2018. They cannot be used to register for seminars or order products beyond the expiry date. Any unused portions of the PD Passports cannot be refunded, credited, or carried forward.

PD Passports may not be used until payment is received in full, and may not be used retroactively for courses or products taken (or ordered) prior to their purchase. No further discount programs may be used in conjunction with the PD Passports.

The PD Passport program is valid for CPABC PD sponsored seminars only. Some CPABC PD programs (e.g. CPABC Executive Programs) are passport invalid. The PD Passport is also invalid towards CPABC conferences that are not organized under the PD Program.

TRANSFERABILITY: Personal PD Passport – not transferable; only the holder can attend seminars using their Personal Passport. Flexi PD Passport – this is the only type of PD passport that is fully transferable.

FLEXI PD PASSPORT – OFFICIAL CONTACT PERSON

For Flexi Passports, you must designate an individual as your official passport contact person. This individual, and no other, will be authorized to receive information and the passport usage, including registration details made under that passport. Individuals who register for seminars using the Flexi PD Passport are providing consent to share that registration information with the official passport contact person of that Flexi PD Passport.

SEMINAR CANCELLATIONS (Applies to all PD Passports)

All cancellations or transfers of registration under PD Passports must be received in writing. Telephone notifications will not be accepted. Cancellations/transfers received at least 10 calendar days prior to the seminar date will not result in a penalty. Cancellations/transfers received less than 10 calendar days but more than 2 full business days prior to the seminar date are subject to an administration fee of $50 for full and half-day seminars, or $25 for executive breakfasts and other 2-hour seminars. The portion of the PD Passport used to register for the seminar will be restored. If the cancellation fee is not paid, the PD Passport portion will be forfeited instead.

Registrants who do not show up for a seminar, and/or who do not notify CPABC PD in writing at least 2 full business days prior to the seminar date (statutory holidays are not considered business days) will be assessed the full PD Passport portion of the seminar. There will be no transfers, credits, or carry-forwards – the portion of the PD Passport used to register for the seminar will be forfeited.

PD PASSPORT REFUNDS

There will be no refunds issued for PD Passports once your order has been processed. Please ensure that you evaluate and understand the type and terms of the PD Passport you are purchasing. Refunds will not be provided for unused passport days.
Professional Development
We can help you go places

2017/2018

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