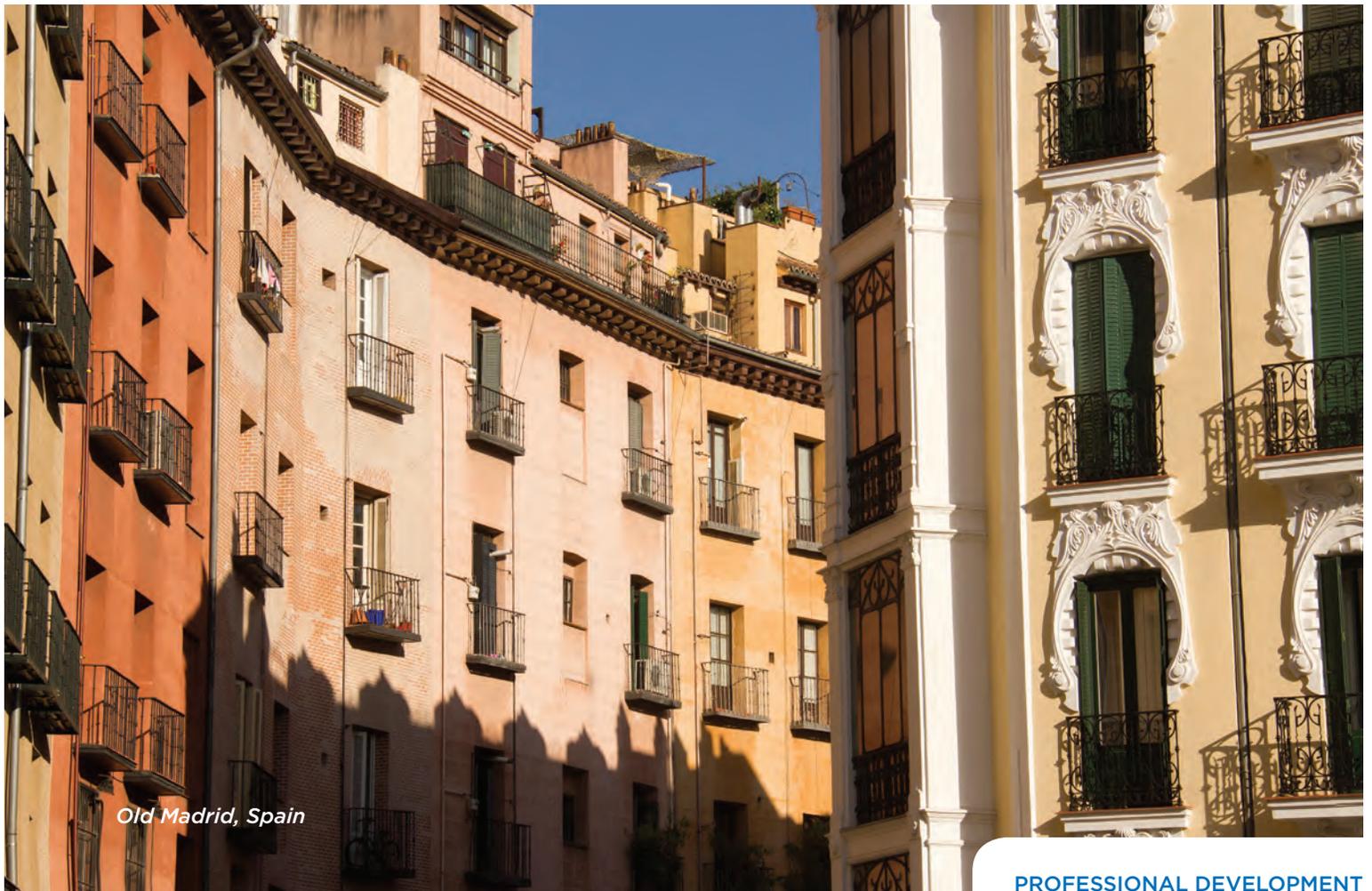


# PD Pathways

We can help you go places

February/March 2018

Winter 2018 PD Highlights  
Upcoming Executive Programs



*Old Madrid, Spain*

## It's time to start your PD planning

It's only the beginning of the year, but there's never really a bad time to start planning your PD for the year. Professional development is after all about you – enhancing your knowledge and skills to expand your professional capacity, and to add value to your organization. And CPABC's PD Program wants to continue being a quality resource for members to obtain both their professional and personal development.

This issue of PD Pathways will focus on upcoming seminars in February and March, as well as highlight our suite of Executive Programs. Our popular *Controller's Program* and *CFO's Programs* are all coming up in April and May. Summer and Fall offerings of these programs tend to sell out quickly, so if you were not successful in registering for them in previous years, now would be a good time to do so.

If you have any questions on PD, email us at [pdreg@bccpa.ca](mailto:pdreg@bccpa.ca) or visit: [pd.bccpa.ca](http://pd.bccpa.ca).

*Coming this fall - October 5, 2018 | Vancouver Convention Ctr*  
**SRED Symposium**



Come join your fellow SRED practitioners and CRA representatives to learn and discuss key topics and recent developments in Scientific Research and Development claims.

Registration will open in July, but if you would like to be placed on a priority list – email [pdreg@bccpa.ca](mailto:pdreg@bccpa.ca) with the subject title SRED Symposium Priority List, include your name and preferred email address in the body of the email, and we will email you when more information becomes available in a few months.



## PD Pathways February/March 2018

### 3-13

Highlights from the PD Program  
February/March

### 14-15

Calendar listing of PD seminars  
February 1 to March 29

### 16-18

Executive Programs

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Web-Based PD Courses

You can choose to unsubscribe from receiving hardcopy PD publications – simply log in to member services online and select your preferences there.

## Visit our website

Our complete Winter 2018 program can be found on our website at [pd.bccpa.ca](http://pd.bccpa.ca).

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## PD HIGHLIGHTS: FEBRUARY/MARCH 2018

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### Audit & Assurance

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#### **Audit: A Survey of Standards with Practical Application**

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. (2 days)

*Feb 22-23 | Vancouver*

#### **Audit Engagements: File Review**

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. (1/2 day)

*Feb 9 | Vancouver*

#### **Common Documentation Issues with Review Engagements**

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. (2 hours)

*Feb 9 | Vancouver*

#### **Review Engagements: Introduction to the New Standard**

This half-day seminar is designed to provide a review of the application of the new Canadian Standard on Review Engagements (CSRE) 2400, Engagements to Review Historical Financial Statements, which is effective for periods ending on or after December 14, 2017. Each stage of the review engagement will be considered, from planning to issuance of the practitioner's report, including a high-level examination of changes relative to the former standards. Practical tools will be used to illustrate examples of documentation, included some insight into the updated Canadian Professional Engagement Manual guidance for review engagements. (1/2 day)

*Feb 26 | Vancouver*

#### **Review Engagements: Practical Application of CSRE 2400**

A new standard on review engagements will come into effect for reviews of financial statements and financial information for periods ending on or after December 14, 2017. This professional development seminar is essential to experienced practitioners who are already aware of the requirements of the new standard CSRE 2400 and the differences from the requirements of the current standard. It is recommended that participants have good awareness of the new standard, or attended *Review Engagements: Introduction to the New Standard* before enrolling in this program. (1 day)

*Feb 15 | Vancouver*

*Feb 21 | Richmond*

*Feb 22 | Surrey*

#### **Review Engagements: File Review**

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. The seminar is designed for experienced professionals interested in improving their review skills. (1/2 day)

*Feb 7 | Surrey*

*Feb 26 | Vancouver*



## PD Highlights

### Financial Reporting

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#### **ASPE: Disclosure and Presentation - From Standards to Words**

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. (1 day)

*Feb 19 | Vancouver*

#### **ASPE: Related Party Transactions – How Do You Measure Up?**

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). (1 day)

*Feb 7 | Vancouver*

#### **IFRS: Disclosure and Presentation - From Standards to Words**

This seminar provides participants with an overview of Part I – International Financial Reporting Standards related to the preparation of all the statements and related note disclosure for all areas, with an emphasis on quality presentation and disclosure. 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. (2 days)

*Feb 20-21 | Vancouver*

#### **IFRS: Financial Instruments**

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. The course will provide participants with the necessary knowledge of the standard to apply it to their own financial instrument fact situation. (1 day)

*Mar 16 | Vancouver*

#### **IFRS: Leases**

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. (1 day)

*Mar 6 | Vancouver*

#### **IFRS: Revenue Recognition Standard**

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. (1 day)

*Feb 23 | Vancouver*

#### **IFRS: Update 2017**

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. (1/2 day)

*Feb 14 | Vancouver*

### Management Accounting & Financial Management

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#### **Activity-Based Costing and Management & Activity-Based Budgeting as a Strategic Weapon**

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. (1 day)

*Mar 8 | Vancouver*

#### **Advanced Financial Statement Analysis**

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 situations in which to use straightforward financial ratio analysis and will also address adjustments which must be made to statements prior to the use of ratios so that the financial analysis techniques are applied effectively. (1 day)

*Feb 15 | Vancouver*

*Feb 16 | Kelowna*

## PD Highlights

### Controllership – A ‘Partner’ for Business

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). (2 days)

*Feb 22-23 | Vancouver*

### Documenting Your Organization’s Financial Processes

This seminar is designed to teach participants how to document their financial work processes and prepare detailed task-based procedures manuals. It will focus on documenting an organization’s financial processes including AP, AR, asset management, treasury, accounting, cash management, accruals, journal entries, and payroll processes. (1 day)

*Mar 16 | Vancouver*

### Effective Financial Analysis for Business Decisions: Small Businesses

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. 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. (1 day)

*Mar 9 | Vancouver*

### Powerful Financial Analysis

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. 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. (1 day)

*Feb 14 | Abbotsford*

### Practical Tips for Controllers & CFOs

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. (1 day)

*Feb 26 | Kelowna*

*Feb 27 | Vancouver*

*Feb 28 | Victoria*

### Process Improvement and Mapping

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. This is a hands-on course. Participants are required to bring a laptop with Microsoft Visio installed to the class. (1 day)

*March 6 | Victoria*

*March 14 | Vancouver*

## Finance

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### Budgeting & Financial Management: Beyond Traditional Budgeting

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. (1 day)

*Feb 22 | Vancouver*

### Budgeting & Financial Management: Understanding Budgeting Variance Analysis & Forecasting

This seminar enables participants to understand and use financial information, adopt a disciplined approach to managing budgets, and communicate with financial specialists. Participants will learn the principles of financial management and how to apply them when making decisions that may affect financial performance. Participants will also be able to understand the context within which a budget must be managed in order to meet corporate reporting requirements, and to understand the responsibilities in managing a budget. (1 day)

*Feb 21 | Vancouver*

*Mar 8 | Victoria*

### Business Valuations: The Basics

This 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. (1 day)

*Feb 26 | Vancouver*

## PD Highlights

### Information & Business Technology

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#### Advanced Data Magic with Excel Paperless

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. This is NOT a hands-on seminar. It will focus on Excel for Windows and is not intended for Excel for macOS. (1 day)

Feb 26 | Vancouver

Mar 14 | Victoria

#### Advanced PivotTables, Including PowerPivot Paperless

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. This is NOT a hands-on seminar. It will focus on Excel for Windows and is not intended for Excel for macOS. (1/2 day)

Feb 21 | Surrey

#### An End to Manual Effort in Excel: Power Query Hands-on | Laptop required

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. 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. This is a hands-on seminar. Please bring a laptop with one of the following programs: Excel 2010 and the free Power Query download; Excel 2013 and the free Power Query download; or Excel 2016 (Power Query is built in to the product). (1 day)

Feb 20 | Vancouver

#### Cloud Computing Paperless

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. (1 day)

Feb 19 | Vancouver

Feb 22 | Victoria

#### Creating Vibrant Dashboards Hands-on | Laptop required

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. This is a hands-on seminar. Please bring a laptop with Excel 2007 or higher. (1 day)

Feb 21 | Vancouver

#### Excel: Beyond the Basics (formerly Excel Advanced) Paperless d

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. It covers advanced Excel topics found in Excel 2007 through Excel 2016. 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. (1 day)

Feb 27 | Vancouver

#### Excel: Specific Skills for Budgeting, Planning and Forecasting Hands-on | Laptop Required

This workshop will help you apply specific skills in Excel to improve budgeting, planning and forecasting in your business. You will work with the many Excel features such as data consolidation for budgets, securing workbooks, forecasting and charting techniques for presentation of budgets. This is a hands-on seminar. Sessions marked "Lab" will provide desktop computers with the current Excel program installed. Sessions NOT marked "Lab" will require attendees to bring their own laptop with Excel 2007 or higher installed.

Feb 16 | Surrey

#### Excel: Specific Skills for Creating Custom Solutions with Macros (formerly Excel Macros Hands-on) Hands-on | Lab

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. This session will take place in a computer lab setting where desktop computers with the current Excel program installed will be provided.

Feb 2 | Vancouver (Lab)

## PD Highlights

### Excel: The Next Level of Skills Hands-on | Lab or Classroom

Discover the best features and functions in Excel to make your accounting and finance tasks easier, faster and more accurate. This 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 is a hands-on seminar. This session will take place in a computer lab setting where desktop computers with the current Excel program installed will be provided.

Feb 23 | Vancouver (Lab)

### Excel Boot Camp Hands-on | Laptop required | Paperless

By using accounting-centric examples, this intensive 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, 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. This is a hands-on seminar. Please bring a laptop with Excel 2007 or higher. (2 days)

Mar 15-16 | Vancouver

### Excel Dashboards Paperless

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. 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. (1/2 day)

Mar 12 | Vancouver

### Excel Financial Models and Analysis Hands-on | Lab

Financial models are mathematical models where variables are linked together to perform calculations. Excel provides an outstanding toolset for creating such financial models. This workshop will provide you with the skills to build financial models for use in decision-making, analysis and forecasting. This is a hands-on seminar. This session will take place in a computer lab setting where desktop computers with the current Excel program installed will be provided.

Mar 9 | Vancouver (Lab)

### Excel Macros Demystified Paperless

This 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. This is NOT a hands-on seminar. It will focus on Excel for Windows and is not intended for Excel for macOS. (1/2 day)

Mar 12 | Vancouver

### Excel Tables and Data Models: Efficiently Managing, Analyzing & Reporting Your Data Paperless

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. (1 day)

Feb 28 | Vancouver

### Excel Tips, Tricks and Techniques for Accountants Paperless

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. 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 be taught in Excel 2016, but reference will be made to the differences between Excel 2016 and Excel 2013, 2010, and 2007. It will focus on Excel for Windows and is not intended for Excel for macOS. (1 day)

Mar 13 | Victoria

### Financial Model: Mining Financial Modeling – Understanding and Analyzing a Mining Company Hands-on | Laptop required

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. This is a hands-on seminar. Please bring a laptop with Windows-based Excel (any version) installed. The seminar is not intended for macOS-based Excel. (1 day)

Mar 22 | Vancouver

## PD Highlights

### Googling is Not Enough: The Best Search Tools You Aren't Using (But Should!) Paperless

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. (1 day)

Mar 14 | Vancouver

### Managing Financial Data With Excel Hands-on | Laptop required

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. This is a hands-on seminar. Please bring a laptop with Windows-based Excel (any version) installed. The seminar is not intended for macOS-based Excel. (1 day)

Mar 20 | Vancouver

### Modeling Business Cash Flows in Excel Hands-on | Laptop required

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. 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. (1/2 day)

Mar 20 | Vancouver

### Paperless Office Paperless

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. This is NOT a hands-on seminar. (1 day)

Feb 20 | Vancouver

### Tech Tools and Gadgets for a More Efficient You Paperless

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. (1/2 day)

Feb 23 | Victoria

### Technology Update Paperless

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. (1/2 day)

Feb 21 | Surrey

Feb 23 | Victoria

## Communication

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### Clear Thinking/Clear Speaking

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. 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. (1 day)

Mar 6 | Vancouver

### Communicating with Influence

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. 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. (1 day)

Feb 19 | Vancouver

### Sharpening Your Business Writing Skills

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. (1 day)

Mar 13 | Vancouver

## PD Highlights

### **The Art of Negotiating...with anyone (formerly The Art of Negotiating...with anyone Parts 1 & 2)**

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. 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. (2 days)

Mar 27-28 | Vancouver

## Problem Solving & Decision Making

### **The Essentials of Project Management**

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 make in supporting 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. (1 day)

Mar 14 | Vancouver

## Professional Behaviour & Ethics

### **Business Ethics - It Starts With You**

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. This course contains 4 hours of ethics content. (1/2 day)

Feb 7 | Richmond

Feb 20 | Abbotsford

Mar 22 | Vancouver

### **Corporate Governance and Ethics**

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. This course contains 3 hours of ethics content. (1 day)

Feb 20 | Vancouver

### **Ethical Principles and the Accounting Profession: CPABC Code Decoded**

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. It builds on your competence in interpreting and applying the CPABC Code of Professional Conduct, and centers on active participation. This course contains 4 hours of ethics content. (1/2 day)

Feb 2 | Surrey

Feb 6 | Victoria

Feb 8 | Vancouver

Mar 2 | Vancouver

Mar 13 | Coquitlam

Mar 14 | Vancouver

### **Shades of Grey - Ethics in the Workplace**

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. This course contains 4 hours of ethics content. (1/2 day)

Feb 28 | Vancouver

Mar 15 | Vancouver

### **Understanding and Embracing Ethics in the Workplace**

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. This course contains 4 hours of ethics content. (1/2 day)

Mar 8 | Vancouver

## Self Management

### **Coach Yourself First**

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. (1 day)

Mar 7 | Vancouver

### **Critical Thinking and Self Reflection**

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. (1 day)

Mar 15 | Vancouver

## PD Highlights

### Influence and Assertiveness

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. (1 day)

Feb 21 | Vancouver

### Triple Your Reading Speed

Do you have enough time to read? Are you tired of feeling overwhelmed? 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! (1 day)

Feb 15 | Victoria

## Teamwork & Leadership

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### Building High Performance Teams

Focused, engaged and highly committed employees represent your biggest expense but the greatest opportunity for achieving sustainable competitive advantage. Yet research 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! (1 day)

Mar 29 | Vancouver

### Empowering and Engaging Others

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. (1 day)

Feb 8 | Vancouver

### Enhancing Your Leadership Impact

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. (1 day)

Mar 21 | Vancouver

Mar 22 | Surrey

### Facilitation Skills

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. (1 day)

Feb 7 | Vancouver

### Leadership and Coaching

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. (1 day)

Nov 23 | Vancouver

Nov 28 | Surrey

### Managing Change and Transformation

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. (1 day)

Feb 27 | Vancouver

### Wiring Your Brain for High Impact Leadership

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. (1 day)

Feb 7 | Vancouver

## PD Highlights

### Strategy Management Certificate Program

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#### **SMCP: 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. (1 day)

*Mar 22 | Vancouver*

#### **SMCP: Risk Management & 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. (1 day)

*Feb 20 | Victoria*

*Mar 23 | Vancouver (full)*

#### **SMCP: Change Management**

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. (1 day)

*Feb 5 | Victoria*

*Feb 15 | Vancouver (full)*

#### **SMCP: Team Development**

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. (1 day)

*Feb 16 | Vancouver (full)*

### Taxation

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#### **Basic Tax Compliance in Self-Employment & Home-Based Business**

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. (2 hrs)

*Feb 8 | Vancouver*

#### **Everyday Income Tax Issues for the General Practitioner**

This seminar deals with income tax issues that general practitioners encounter everyday. 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, suggestions and planning will be emphasized. (1 day)

*Feb 6 | Vancouver*

#### **GST/HST: Beyond the Basics**

The application of GST/HST is often far more complex than practitioners or businesses appreciate. 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. (1 day)

*Feb 13 | Vancouver*

#### **GST/HST: Tips and Traps**

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. (2 hrs)

*Feb 7 | Vancouver*

#### **Income Tax Issues Dealing with Real Estate**

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. (1 day)

*Feb 13 | Vancouver*

## PD Highlights

### Income Tax Planning Refresher for Corporate Tax

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. Participants may wish to consider attending Tax Returns: Corporate prior to taking this seminar, or should have equivalent experience in corporate tax matters. (2 days)

Mar 15-16 | Vancouver

### Income Tax Update 2017

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. (1 day)

Feb 22 | Vancouver

### Legal Considerations in Personal Planning for Death and Incapacity

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. (2 hrs)

Feb 21 | Vancouver

### Tax Returns: Corporate

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. (1 day)

Feb 20 | Vancouver

### Tax Returns: Personal

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. (1 day)

Feb 9 | Vancouver

### Taxation of Employee Benefits

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. (1/2 day)

Feb 8 | Victoria

## Wealth Management

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### Enough Bull: How to Retire Well Without the Stock Market

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 has proven one thing: traditional retirement planning advice is way too risky. Trusting the stock market is like gambling with a family's future. But how does one plan for retirement without the possibility of losing up to 50 per cent of their investment value within a matter of months? The simple truth is that it is possible to retire financially well using guaranteed, safe fixed-income products like GICs that can never decline in value combined with government defined benefit pension plans including CPP and OAS. This course will detail the non-traditional view to money management that many investment advisors don't want to talk about. (1 day)

Feb 15 | Abbotsford

### Money, Mindfulness and Power

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. (1/2 day)

Mar 13 | Vancouver

## PD Highlights

### **Smoke & Mirrors: Financial Myths that will Ruin Your Retirement Dreams**

There is a lot of confusion when it comes 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 adviser. But what if those answers are wrong? The problem is that much of the common advice is from people with a conflict of interest. Many are simply trying to sell financial products that make them money... at the client’s expense. This course is designed to cut through the sales pitches and get to the simple truth. (1 day)

*Feb 16 | Vancouver*

*Mar 16 | Victoria*

### **The Psychology of Money**

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. (1/2 day)

*Feb 13 | Vancouver*

### **The Simplest Personal Strategy Ever: Cash Cows, Pigs and Jackpots**

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 going to send many people to the poor house. That’s because 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. (1 day)

*Mar 15 | Surrey*

Please note that these are only some of our offerings in February and March. For the full schedule, visit our website at [pd.bccpa.ca](http://pd.bccpa.ca).



## PD CALENDAR: February 1 – March 29, 2018

**Note: Schedule is current at time of printing. Check our website at [pd.bccpa.ca](http://pd.bccpa.ca) for the most up-to-date course status, including cancelled or sold-out offerings.**

### VANCOUVER

1-Feb	Review Engagements - Introduction to the New Standard	22-Feb	Controllership - A 'Partner' for Business
1-Feb	Gateway to Membership: Welcome to the Pros	22-Feb	Income Tax Update 2017
2-Feb	Excel: Specific Skills Creating Custom Solutions with Macros	23-Feb	IFRS: Revenue Recognition Standard
6-Feb	Everyday Income Tax Issues for the General Practitioner	23-Feb	Compilation Engagements (public practice license req.)
7-Feb	ASPE: Related Party Transactions - How Do You Measure Up?	23-Feb	Excel: The Next Level of Skills
7-Feb	Wiring Your Brain for High Impact Leadership	26-Feb	Review Engagements - Introduction to the New Standard
7-Feb	GST/HST: Tips and Traps	26-Feb	Review Engagements: File Review
8-Feb	Ethical Principles and the Accounting Profession	26-Feb	Business Valuations: The Basics
8-Feb	Empowering and Engaging Others	26-Feb	Advanced Data Magic with Excel
8-Feb	Basic Tax Compliance in Self-Employment & Home-Based Bus.	27-Feb	Practical Tips for Controllers & CFOs
8-Feb	Taxation of Employee Benefits	27-Feb	Excel: Beyond the Basics
9-Feb	Common Documentation Issues with Review Engagements	27-Feb	Facilitation Skills
9-Feb	Audit Engagements: File Review	27-Feb	Managing Change and Transformation
9-Feb	Tax Returns: Personal	28-Feb	Excel Tables and Data Models: Efficiently Managing Your Data
13-Feb	The Psychology of Money	28-Feb	Shades of Grey - Ethics in the Workplace
13-Feb	ASPE: A Survey of the Standards (public practice license req.)	2-Mar	Ethical Principles and the Accounting Profession
13-Feb	Executive Compensation	6-Mar	IFRS: Leases
13-Feb	GST/HST: Beyond the Basics	6-Mar	Clear Thinking/Clear Speaking
13-Feb	Income Tax Issues Dealing with Real Estate	7-Mar	Coach Yourself First
14-Feb	IFRS: Update 2017	8-Mar	Activity-Based Costing & Mgmt and Activity-Based Budgeting
15-Feb	Review Engagements: Practical Application	8-Mar	Understanding and Embracing Ethics in the Workplace
15-Feb	Advanced Financial Statement Analysis	9-Mar	Corporate Treasury Management
15-Feb	Advisory Services and FOPI (public practice license req.)	9-Mar	Effective Fin. Analysis for Business Decisions: Small Bus.
15-Feb	Strategic Mgmt Certificate - Change Management	9-Mar	Excel Financial Models and Analysis
16-Feb	Law Society, Real Estate Council & Other Specified Procedure	12-Mar	Excel Dashboards
16-Feb	Smoke & Mirrors: Financial Myths that will Ruin Retirement	12-Mar	Excel Macros Demystified
16-Feb	Compilation Engagements (public practice license req.)	13-Mar	Money, Mindfulness and Power
16-Feb	Strategic Mgmt Certificate - Team Development	13-Mar	Sharpening Your Business Writing Skills
17-Feb	Review Engagements: Practical Application (public practice license req.)	14-Mar	Process Improvement and Mapping
19-Feb	ASPE: Disclosure & Presentation - From Standards to Words	14-Mar	Google is Not Enough: The Best Search Tools You Aren't Using
19-Feb	Starting a Successful CPA Practice (public practice license req.)	14-Mar	Ethical Principles and the Accounting Profession
19-Feb	Cloud Computing	14-Mar	The Essentials of Project Management
19-Feb	Communicating with Influence	14-Mar	Leadership and Coaching
20-Feb	IFRS: Disclosure & Presentation - From Standards to Words	15-Mar	Excel Boot Camp
20-Feb	An End to Manual Effort in Excel: Power Query	15-Mar	Shades of Grey - Ethics in the Workplace
20-Feb	Paperless Office	15-Mar	Critical Thinking and Self Reflection
20-Feb	Corporate Governance and Ethics	15-Mar	Income Tax Planning Refresher for Corporate Tax
20-Feb	Tax Returns: Corporate	16-Mar	IFRS: Financial Instruments
21-Feb	Budgeting & Financial Mgmt: Understanding Budgeting Variance	16-Mar	Documenting Your Organization's Financial Processes
21-Feb	Creating Vibrant Dashboards	20-Mar	Modeling Business Cash Flows in Excel
21-Feb	Influence and Assertiveness	20-Mar	Managing Financial Data With Excel
21-Feb	Legal Considerations in Personal Planning for Death	21-Mar	Building a Financial Model of a Company
22-Feb	Budgeting & Financial Mgmt: Beyond Traditional Budgeting	21-Mar	Enhancing Your Leadership Impact
22-Feb	Audit: A Survey of Standards with Practical Application	22-Mar	Financial Model: Mining Financial Modeling
		22-Mar	Business Ethics - It Starts With You
		22-Mar	Strategic Mgmt Certificate - Strategic Planning
		23-Mar	Strategic Mgmt Certificate - Risk Management & Governance
		27-Mar	The Art of Negotiating... with anyone
		29-Mar	Building High Performance Teams

## PD Calendar

### ABBOTSFORD

- 14-Feb Powerful Financial Analysis
- 15-Feb Enough Bull: How to Retire Well Without the Stock Market
- 20-Feb Business Ethics - It Starts With You
- 20-Feb Business Ethics - It Starts With You

### COQUITLAM

- 13-Mar Ethical Principles and the Accounting Profession

### KELOWNA

- 16-Feb Advanced Financial Statement Analysis
- 26-Feb Practical Tips for Controllers & CFOs

### RICHMOND

- 7-Feb Business Ethics - It Starts With You
- 21-Feb Review Engagements: Practical Application
- 2-Mar Ethical Principles and the Accounting Profession

### SURREY

- 2-Feb Ethical Principles and the Accounting Profession
- 7-Feb Review Engagements: File Review
- 16-Feb Excel: Specific Skills for Budgeting, Planning & Forecasting
- 21-Feb Advanced PivotTables, Including PowerPivot
- 21-Feb Technology Update
- 22-Feb Review Engagements: Practical Application
- 15-Mar The Simplest Personal Strategy Ever
- 21-Mar Leadership and Coaching
- 22-Mar Enhancing Your Leadership Impact

### VICTORIA

- 5-Feb SMCP - Change Management
- 6-Feb Ethical Principles and the Accounting Profession
- 15-Feb Triple Your Reading Speed
- 20-Feb SMCP - Risk Management & Governance
- 21-Feb Controller's Operational Skills Program
- 22-Feb Cloud Computing
- 23-Feb Tech Tools and Gadgets for a More Efficient You
- 23-Feb Technology Update
- 28-Feb Practical Tips for Controllers & CFOs
- 6-Mar Process Improvement and Mapping
- 8-Mar Budgeting & Financial Mgmt: Understanding Budgeting Variance
- 13-Mar Excel Tips, Tricks and Techniques for Accountants
- 14-Mar Advanced Data Magic with Excel
- 16-Mar Smoke & Mirrors: Financial Myths that will Ruin Retirement

To register

web | [pd.bccpa.ca](http://pd.bccpa.ca)  
email | [pdreg@bccpa.ca](mailto:pdreg@bccpa.ca)  
phone | 604 872.7222



# Executive Programs

## CPABC PD Executive Programs

Navigating the complex environment in which you conduct business can be challenging; we're here to help you rise to that challenge. CPABC Executive Programs are multi-day, interactive, in-residence programs. The format is conducive to achieving greater depth in your learning - experienced facilitators will guide you through the learning curriculum, and you will reflect on learning outcomes to develop actionable plans for yourself and your organization. You will also benefit from peer sharing and building a professional network. Joining our suite of established programs this year is *Enterprise Risk Management Fundamentals*.

<b>THE CONTROLLER'S PROGRAM</b> Created with the aspiring and new Controller in mind.	<b>THE CFO'S PROGRAM</b> Geared towards aspiring and new CFOs.	<b>CFO AS NAVIGATOR PROGRAM</b> Geared towards seasoned financial executives.	<b>ENTERPRISE RISK MGMT FUNDAMENTALS</b> For financial professionals seeking specific knowledge in the area.
<i>The Controller's Operational Skills Program</i> focuses on the core technical processes and procedures of the financial role.	<i>The CFO's Operational Skills Program</i> focuses on the strategic technical competencies of the role.	<i>The CFO as Navigator Program</i> 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.	<i>Enterprise Risk Management Fundamentals</i> is a stand-alone program created for financial professionals who want to learn the fundamentals and best practices of risk management to enhance their role and add value to their organization.
<i>The Controller's Management Program</i> focuses on honing your personal and interpersonal effectiveness.	<i>The CFO's Leadership Program</i> focuses on developing the skills of an influential leader in your organization.		

## Upcoming Dates

### Controller's Operational Skills Program

February 21-24, 2018 | Westin Bear Mountain, Victoria  
April 15-18, 2018 | Grand Okanagan Resort, Kelowna  
July 15-18, 2018 | Westin Whistler Resort, Whistler  
September 16-19, 2018 | Delta Whistler Village, Whistler  
November 14-17, 2018 | Westin Bear Mountain, Victoria

### CFO's Operational Skills Program

April 15-18, 2018 | Westin Whistler Resort, Whistler  
June 17-20, 2018 | Westin Bear Mountain, Victoria  
September 23-26, 2018 | Westin Whistler Resort, Whistler

### CFO as Navigator

May 23-26, 2018 | Westin Whistler Resort, Whistler  
October 10-13, 2018 | Westin Whistler Resort, Whistler

### Controller's Management Program

April 11-14, 2018 | Grand Okanagan Resort, Kelowna  
July 18-21, 2018 | Westin Whistler Resort, Whistler  
November 18-21, 2018 | Westin Bear Mountain, Victoria

### CFO's Leadership Program

April 22-25, 2018 | Westin Whistler Resort, Whistler  
June 13-16, 2018 | Westin Bear Mountain, Victoria  
September 19-22, 2018 | Delta Whistler Village, Whistler

### Enterprise Risk Management Fundamentals

October 14-17, 2018 | Delta Whistler Village, Whistler

For more information on these programs, please visit [pd.bccpa.ca/pd-in-depth](http://pd.bccpa.ca/pd-in-depth)

## Executive Programs

### The Controller's Operational Skills Program

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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 Controllershship.

#### Who Should Attend

Are you responsible for management and financial reporting? Do you want to build upon your operational skills and knowledge of Controllershship? 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.

Approximately half of the total program time is allocated to group activity and discussion to build a high level of engagement, sharing of participants' ideas and general networking.

### The Controller's Management Program

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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. It 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 course 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 your interpersonal and management skills

#### Special Features

- Leadership assessments will be completed as pre-work to help frame your role and who you are
- One-on-one session with professional Executive Coach provided on-site

### The CFO's Operational Skills Program

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Reporting to the CEO or President, the Chief Financial Officer is the top job that leads, initiates, and manages the financial decision-making process within the organization. This program delivers core CFO operational competencies that organizations expect and demand. Examine the relationship of strategy and risk-taking and help drive your organization's mission and success. Nail down the strategy, planning, budgeting and internal control competencies to facilitate efficient and effective operations. Learn how to effectively communicate metrics and operating results for internal and external stakeholders.

#### Who Should Attend

Do you currently direct, or wish to direct the finance and administration areas of your organization? Do the CEO and the Board look to you for counsel and guidance? 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.

### The CFO's Leadership Program

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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 and become a strategic partner. This program concentrates on areas where CFOs have told us they feel they need the most help:

- Leveraging strategy to get results
- Communicating and persuading others
- Leading & influencing across all stakeholders
- Leading culture and change

#### Who Should Attend

This course 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

#### Special Features

- Leadership assessments will be completed as pre-work to help frame your role and who you are
- One-on-one session with professional Executive Coach provided on-site

## Executive Programs

### The CFO as Navigator Program

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The 21st century CFO is hearing the new calling from the corporate boardroom - “step out and go beyond the box”. Long gone are the days when the CFO was primarily focused on the traditional box of command and control, financial and management reporting.

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 midmarket companies who are at the zenith of their career and are ready for the next challenge in their career.

#### New Program!

### Enterprise Risk Management Fundamentals

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In our increasingly complex environment, it is critical that Finance professionals understand and embrace Risk Management as a key discipline. This three-day, seven module program has been designed to help Finance leaders prepare for, and quickly react to evolving business threats and opportunities. By understanding and properly managing risk, businesses can thrive, create value and achieve a competitive advantage.

Learning outcomes participants can expect:

- Understand how Enterprise Risk Management enhances Corporate Governance and aligns with business strategy and corporate culture.
- Develop the ability to identify and assess the various risks that may have a critical impact on business, and choose the optimal risk mitigation strategies.
- Develop successful strategies for reporting on risks for Senior Management and Boards.
- Learn and properly apply key Risk Management tools, including Risk and Control Assessments and Key Risk Indicators.

#### Who Should Attend

The program will be of great benefit to financial professionals with a few years of experience, who want to learn the fundamentals and best practices of risk management in order to either further their career, or add value to their organization.

It is especially valuable for those financial professionals in organizations and industries where Risk Management is gaining critical importance.

## Executive Program Certificates

**The CPABC Controllership Program Certificate** is a two-component program designed to provide you with the foundation for success. The Controller’s Management Program will focus on management soft skills, while The Controller’s Operational Skills Program will focus on core technical and operational skills. Note that these programs can be completed in any order as they focus on separate and distinct skills.

**The CPABC CFO Program Certificate** is a two-component program designed to provide you with the foundation for success. The CFO’s Leadership Program will focus on management and leadership skills, while The CFO’s Operational Skills Program will focus on core technical and operational skills. Note that these programs can be completed in any order as they focus on separate and distinct skills.

**The CFO as Navigator Program** is a stand-alone program, and attendees will receive a certificate upon completion.

**The Enterprise Risk Management Fundamentals Program** is a stand-alone program, and attendees will receive a certificate upon completion.

## Web-Based Learning

Upcoming PD – online and with verifiable CPD opportunities

### PD AudioWeb

#### Description

Direct audio recordings from live CPABC PD seminars, available as downloadable MP3 audio files along with corresponding handout materials in PDF.

#### A sample of titles (check website for availability)

BC PST Refresher & Comparison with GST/HST  
Breaking Up is Hard to Do  
Cloud Computing  
Creative Use of Partnerships in Tax Planning  
Employment Standards Overview  
Ethical Tax  
Ethics in the Real World  
GST/HST: Tips and Traps  
Handling Termination of Employment  
International Employees – Cross Border Tax  
Lenders, Banking & Your Client  
Maximize Your Workforce: Bridging the Generational Divide  
Negotiating: Challenges & Pitfalls  
Planning for a Business  
Practical Transfer Pricing & Update on Latest Developments  
Probate Fee Avoidance Planning  
Retirement Planning for Financial Professionals  
Safe Income – A Comprehensive Review  
SBD Multiplication – Closing the Loopholes  
Supercharge Your Business with IT  
Tax Issues in Shutting Down a Corporation  
Tax Issues in Starting a Business  
To Be or Not To Be: The Executor  
Top Employment Issues Affecting Your Bottom Line

### ProDio Audio Learning

#### Description

Audio only PD courses delivered via a mobile app available through the App Store and Google Play. Course link will enable access to the course on your smartphone or tablet, or listening via the web desktop version.

#### Available titles

Lies, Alternative Facts and Professional Skepticism  
Leading Through Influence  
Conversations in the Boardroom, Conversations in the Hallway  
Planning Foundations

For the full inventory of web-based PD seminars and detailed descriptions, visit our website at [pd.bccpa.ca](http://pd.bccpa.ca), or email [pdreg@bccpa.ca](mailto:pdreg@bccpa.ca) if you have any questions.

### Corporate Finance Institute (CFI)

#### Description

Archived webinars designed for financial professionals and industry practitioners who want to master the art of corporate finance. The following webinars are available to CPABC members at a special price.

#### Available titles

Math for Corporate Finance  
Financial Analysis Fundamentals  
Financial Modeling Fundamentals  
Building a Financial Model in Excel  
Business Valuation Fundamentals  
Rolling 12-Month Cash Flow Forecast  
Behavioural Financial Fundamentals  
Excel Dashboards and Data Visualization  
Sensitivity Analysis for Financial Modeling  
Financial Modeling Using VBA  
Startup/eCommerce Financial Model and Valuation  
Mining Financial Model & Valuation  
Advanced Excel Formulas

### K2E Canada Inc

#### Description

Live technology-focused webinars delivered through the GoToTraining solution from Citrix as the training platform (works with virtually all computers).

#### A sample of titles (check website for dates & times)

Creating Stunning Dashboards with Power BI Desktop  
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 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  
Power Up Your PivotTables  
Securing Your Data – Practical Tools for Protecting Information  
Top Excel Tips and Tricks

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## A look ahead to spring and summer

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### **Spring/Summer 2018 PD Catalogue**

Watch for the Spring/Summer 2018 PD Catalogue at the end of March. The complete schedule of titles and dates will also be available on our website at [pd.bccpa.ca](http://pd.bccpa.ca) by the middle to end of March. Our Spring/Summer program includes seminars and conferences between May and August.

### **PD Nexus (formerly PD Conference Days)**

We will unveil our lineup of PD Nexus conferences soon. Check our website in late February for conference titles, selection of plenary and breakout presentations, and speakers.

### **PD Passports**

Just a reminder that the 2017-2018 PD Passports will expire at the end of August. These passports cannot be used to register for courses with dates past August 31, 2018. The 2018-2019 PD Passports will go on sale in July, and these can be used to register for courses dated September 1, 2018 through to August 31, 2019.