CHARTERED PROFESSIONAL ACCOUNTANTS BRITISH COLUMBIA

# PD Pathways

## We can help you go places

October/November 2017

Public Practice Insights
Financial Planning Insights
Business Insights
Local Government Accounting & Auditing Workshop
Upcoming Seminars

*Dunluce Castle, County Antrim, Northern Ireland*

PROFESSIONAL DEVELOPMENT

Professional Development **pathways**

October/November 2017

## Welcome to Fall PD 2017

A new PD season begins! CPABC's Professional Development team is excited to unveil another lineup of courses and programs that cover a wide variety of technical and soft-skills topics to meet the needs of our diverse membership, and we hope members continue to find us a reliable and quality source for professional development.

One new development this fall is the rebranding of our popular PD Conference Days to *PD Nexus*. The new brand is intended to leverage the meaning of the "nexus" – a connection which links a series of ideas. Now a staple in our PD program, these conference-format courses will continue to deliver a variety of topics in a concise and convenient manner. Here are the upcoming *PD Nexus* days to watch for:

- Public Practice Insights (formerly Practitioners' Potluck) – October 25, 2017
- Financial Planning Insights (formerly Personal Financial Planning Conference) – December 5, 2017
- Business Insights (formerly Members in Business & Industry PD Day) – December 6, 2017
- Beyond Financial Reporting Insights – February 20, 2018

We have also partnered with *K2E Canada*, *Corporate Finance Institute*, and *ProDio Audio Learning* to bring new titles into our growing inventory of online offerings.

The demand for our Executive Programs – The Controller's Program, The CFO's Program, and the CFO as Navigator Program – continues to grow, and we have now added additional sessions to our program, to be held in Whistler, Kelowna, and Victoria. Watch for the Executive Program flyer coming soon, check our website, or email us for future dates and locations.

If you have any questions on PD, email us at **pdreg@bccpa.ca** or visit: **pd.bccpa.ca.**

## PD Passports 2017-2018

It's not too late to purchase a PD Passport for the 2017-18 PD year. Our PD Passports now are now valid from *September 1, 2017 to August 31, 2018.*
**Personal PD Passport - $1,650 for 6 days of PD (non-transferable)**
**Flexi PD Passport - $2,050 for 6 days of PD (full transferable)**
See page 28 for more information.

## PD Pathways

**October/November 2017**



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 Fall 2017/Winter 2018 PD schedule is available on our website at pd.bccpa.ca.

# VANCOUVER PD WEEK

## November 20-25, 2017
**Vancouver Convention Centre, West Building**

### Monday · November 20
Risk on a One Lane Highway
An Introduction to Strategy Driven Budgeting
ASPE: Related Party Transactions – How Do You Measure Up?
Catching Up: 5 Years of Income Tax Developments
Fraud Risk Management Principles & Practices
Income Tax Update 2017
NFPOs: A Survey of the Standards (Private Sector)
Audit Engagements: File Review
IFRS: Disclosure & Presentation – From Standards to Words (2 days)

### Tuesday · November 21
Advanced Tax Planning Strategies
ASPE: A Comparison to IFRS
Becoming a High Performance Team Member
Coach Yourself First
Creative Thinking for Accountants
Documenting Your Organization's Financial Processes
Project Management: Tips & Traps

### Wednesday · November 22
Understanding and Embracing Ethics in the Workplace
Assurance & Professional Practice Update
Managing Change and Transformation
Powerful Financial Analysis
Tax Planning for Private Enterprises on Business Succession
Quality Control Manual for Public Practitioners – CSQC 1
When it Hits the Fan: A Primer in Crisis Communication Mgmt

### Thursday · November 23
Life-Interest Trusts as Will Substitutes
Public Company Reporting: Annual Update
Audit: Applying Audit Standards to a Small Entity
Business English for Professionals
Managing My People
Scientific Research & Experimental Development Tax Credits
Tax Returns: Personal

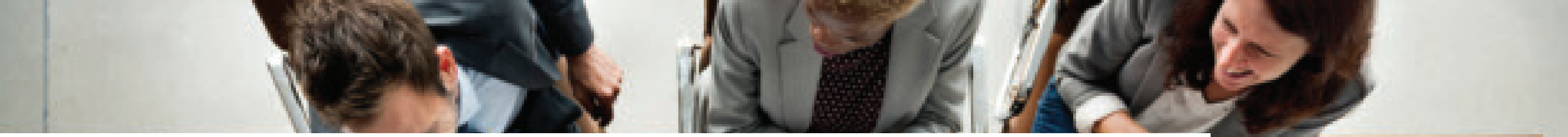
### Friday · November 24
Wealth Management Tools and Practices
Balancing Your Wheels
Business Valuations: Beyond the Basics
Due Diligence for Acquisitions
GST/HST: Preparing for an Audit
IFRS: Leases
Purchase & Sale of a Business: Income Tax & Related Issues
Section 85: Transfer of Property

### Saturday · November 25
Ethical Principles and the Accounting Profession

The December 11-16 Vancouver PD Week will be featured in the November/December edition of PD Pathways. Details can be found on the PD website at **pd.bccpa.ca**.

**In addition to Vancouver, we will be holding PD Weeks in the following cities:**

Kelowna: October 23-27 | Coast Capri
Parksville: October 30-November 3 | Quality Bayside
Victoria: November 6-10 | Victoria Conference Centre
Victoria: November 27-Deecmber 1 | Victoria Conference Centre
Surrey: December 4-8 | Sheraton Guildford



# Local Government Accounting & Auditing Workshop

November 16-17, 2017 · Coast Coal Harbour Hotel, Vancouver

## CPABC & GFOABC

**Joint Conference**

This workshop, offered in conjunction with the *Government Finance Officers Association of BC*, will provide a forum for practitioners and auditors to discuss the issues facing local governments.

Practices within the Local Government sector are ever-evolving, and increasing expectations of accountability are changing the way audits are performed. The workshop will allow practitioners and auditors to get up-to-date on practices, discuss issues, and exchange ideas. It will provide participants knowledge of the latest rules and how they interact with each other. It will also offer the opportunity for participants to meet with some of those involved in standard setting.

This workshop is designed for local government finance officers, staff who prepare financial statements, and auditors of local government entities. It will be of interest to senior finance officers who are not involved in accounting on a day-to-day basis, but who need to know the issues.

**November 16-17, 2017**
**Coast Coal Harbour Hotel**

Course Fee: $785
CPD Hours: 14
PD Passport Valid: 2 days

A special rate as well as a block of rooms have been arranged at the Coast Coal Harbour Hotel. The cut-off date is October 30, 2017. Please refer to pd.bccpa.ca for details on the rate and to register.

## WORKSHOP SPEAKERS

*Erik Berg, CPA, CMA*

Erik is KPMG Advisory Partner, Risk Consulting and National Leader of Emerging Technology Sector.

*Bill Cox, FCPA, FCA*

Bill has been with BDO Canada LLP for over 30 years, with over 20 years as a partner. He has worked exclusively in the public and not-for-profit sectors.

*Sandra Hamilton*

Sandra is a strategic procurement advisor, speaker and holds Canada's first Social MBA.

*Joseph Hickey*

Joe is a Director at PwC in their Vancouver Office.

*Karen Lindsay*

Karen joined the City of Nanaimo over 15 years ago and has been the Emergency Program Manager since 2008.

*Michelle Mason, CPA, CGA*

Michelle is the Financial Officer for the Village of Cumberland.

*Laura Mercer, CPA, CGA*

Laura is Manager of Accounting Services with the City of Nanaimo.

*Mario Pirrodi, CPA, CA, CIA*

Mario is a partner with BDO Kamloops, and brings assurance and related services that he has accumulated since 2001.

*Kristine Simpson, CPA, CA*

Kristine is a partner in the public sector group of BDO Canada LLP, Vancouver Office.

*Jason Stevenson, CPA, CMA*

KPMG Director, Risk Consulting and Western Canada Leader of Cybersecurity Sector.

*Cliff Trollope*

Cliff is a Partner in MNP's Enterprise Risk Services group and leads MNP's National Business Resilience Practice.

*Cory Vanderhorst, CPA, CA*

Kristine is a partner in the public sector group of BDO Canada LLP, Vancouver Office.

*Dave Warren, CPA, CA*

Dave is a Principal of the Public Sector Accounting Board (PSAB) of Canada.

## LOCAL GOVERNMENT ACCOUNTING & AUDITING - AGENDA

### Day 1

*7:30-8:30AM Registration & Continental Breakfast*

| | |
|---|---|
| 8:30-8:45AM | **Welcome & Introductory Remarks** |
| 8:30-8:45AM | **Local Government's Role in Providing Clean Drinking Water**<br>*Auditor General for Local Government* |

*10:15-10:30AM Refreshment Break*

| | |
|---|---|
| 8:30-8:45AM | **PSAB Update Plus**<br>*Dave Warren* |

*12:05-1:15PM Lunch*

| | |
|---|---|
| 1:15-2:15PM | **Mobility and Smart Cities**<br>*Joseph Hickey* |
| 2:15-3:00PM | **PSAB Employee Benefits Project – There May Be Unintended Consequences**<br>*Mario Pirrodi* |

*3:00-3:30PM Refreshment Break*

| | |
|---|---|
| 3:30-4:30PM | **Miscellany of Accounting & Auditing Issues**<br>*Local Government Accountants & Auditors* |

*4:30-5:30PM Reception & No-Host Bar*

### Day 2

*7:30-8:30AM Registration & Continental Breakfast*

| | |
|---|---|
| 8:30-8:45AM | **Introduction to Day 2** |
| 8:45-9:45AM | **Ethics in Government – Not an Oxymoron**<br>*Kristine Simpson* |
| 9:45-10:45AM | **Business Continuity Planning – Key to Managing Risks and Building Resilient Communities**<br>*Cliffe Trollop and City of Nanaimo* |

*10:45-11:00AM Refreshment Break*

| | |
|---|---|
| 11:00AM-12:00PM | **Emerging Technology Risks – Are You Prepared?**<br>*Jason Stevenson & Erik Berg* |

*12:05-1:15PM Lunch*

| | |
|---|---|
| 1:15-2:00PM | **Strategic Procurement – A New Approach to Sustainable Economic Development**<br>*Sandra Hamilton & City of Cumberland* |
| 1:15-2:00PM | **Municipal Lean Programs**<br>*To be confirmed* |

*2:45-3:00PM Refreshment Break*

| | |
|---|---|
| 3:00-3:45PM | **Panel Discussion (topic to be confirmed)**<br>*Local Government Practitioners and Auditors* |
| 3:45-4:30PM | **PSAB Conceptual Framework and New Financial Reporting Model – Will Financial Statements Become More Understandable**<br>*Bill Cox* |

# PD NEXUS: Public Practice Insights

October 25, 2017 · Vancouver Convention Centre, West Building

Now offered annually, this popular conference, formerly known as *Practitioners' Potluck*, 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 for you 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 *PD Nexus* day.

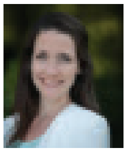
This conference is designed for practitioners in public practice in BC, particularly sole practitioners and members of small to medium-sized firms.

**October 25, 2017**
**Vancouver Convention Centre**

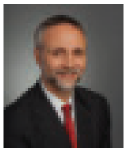
Course Fee: $475
CPD Hours: 7
PD Passport Valid: 1 day

To register, please go to our website at **pd.bccpa.ca/conferences** or email us at **pdreg@bccpca.ca.**

## CONFERENCE SPEAKERS

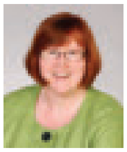


*Corinne Impey* is Founder of Six Words Communication Corp., and is a versatile, action-oriented communication specialist. She has worked with accounting firms, large corporations and non-profits to solve communication challenges, build brands and drive business results. Corinne holds a journalism degree from Carleton University and a Masters of Professional Communication degree from Ryerson University. In 2015, Corinne received a Gold Quill Excellence Award from the International Association of Business Communicators for her work in change communication.

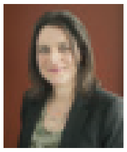


*Ed Kroft, Q.C., CPA(Hon)* is a partner in the firm of Blake Cassels & Graydon LLP where he leads the tax controversy and litigation group. He appears before all levels of court, including Supreme Court of Canada, Federal Court of Appeal, Federal Court and Tax Court of Canada, and acts for clients in transfer pricing disputes. Honours and awards include the 2006 CICA Award for Excellence in Income Tax Practice and Education; the Queen Elizabeth II Diamond Jubilee Medal for his significant contributions of work for the Canadian Tax Foundation (CTF) in 2012 and a CTF Lifetime Achievement Award in 2016.

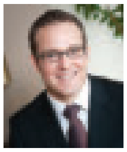
*Stella Leung, CPA, CA* is the Professional Standards Advisor at CPABC. She assists members in public practice and industry with ethical and technical questions as well as practice management and other professional issues.



*Diane 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 and U.S. GAAP.



*Bridget Noonan, CPA, CA* began her career with a mid-size accounting firm and spent 12 years as a leader in the audit and assurance practice, while managing internal training and firm development. Bridget continued to support and assist practitioners and members as a professional standards adviser at CPABC. Bridget is the co-founder of Clearline Consulting dedicated to providing consulting services to small and mid-size public practice firms.



*Shane Onufrehuk, FCPA, FCA* is a Partner, Tax at KPMG LLP. Shane's focus in 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 PD, and had been involved in teaching and course development for the CPA Western School of Business and Sauder School of Business.

*Sharon Perry, CPA, CA* is the Growth Advocate of Sharon Perry Inc. She has established herself as a leader in developing a strong brand and a thriving practice. Before founding her firm in 2011, Sharon worked with EPR, Grant Thornton, and Blue Fish Group. Sharon is deeply committed to her community and has served in a variety of ways, including the Eagle Ridge Hospital Foundation, Tri-Cities Chamber of Commerce, and Operation Red Nose. In addition to being voted as "Favourite Accountant" for several years by readers of *Tri-City News*, Sharon was a finalist for Small Business of the Year in 2014 and awarded an Early Achievement Award by CPABC in 2016.

*Grant Smith, CPA, CA* is a senior partner at Clearline CPA. 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.

## PD NEXUS: PUBLIC PRACTICE INSIGHTS - AGENDA

**8:30-8:35AM**
**Welcome & Introduction**

Welcome and introductory remarks from *Simone Leonard, VP, Education & Professional Development*, CPABC.

**8:35-10:05AM**
**Plenary Session**

### Breaking All The Rules!

*Sharon Perry*

Your 'practitioner' title doesn't need to define you. Starting as a sole practitioner of a home-based business, Sharon grew her business through diligence and using creative tactics that showcased her approach. Hear how Sharon took a step back from the day-to-day, created multiple roles for herself and watched her business thrive. She is an accountant by trade, and through intelligent decisions and passion has earned the title 'successful entrepreneur' as well. Find out how Sharon broke the rules to become Growth Advocate of her own firm.

*10:05-10:25AM Refreshment Break*

**10:25AM-12:05PM**
**Breakout Sessions**

### Tax in the Current Time Zone

*Ed Kroft & Shane Onufrechuk*

Do you find it hard to keep up to date in the ever changing world of tax cases, new CRA policies and initiatives, as well as legislation? It seems that no matter how much we read, something always seems to slip between the cracks, and yet our clients need us to stay current. This presentation will analyze topical court cases, the recently proposed government reforms and their potential impact on private corporation owners, and other government pronouncements in an attempt to fill in those holes and provide you with insights to stay on top of the hot tax topics of the day.

### Leveraging Your Professional Network

*Bridget Noonan*

Whatever you believe the future of the 'generalist' in public practice is, it is undebatable that we all need a professional network. As standards and requirements increase in complexity, acknowledging that there are limits to what you can do on your own is nothing more than good practice risk management. Small practitioners will have to make a choice: supplement your own skills or limit the services you provide. This session will provide you with examples and insights of how small practitioners have continued to provide the full range of services they always have – just not alone.

*12:05-1:15PM Lunch*

**1:15-1:45PM**
**Plenary Session**

### CPABC Member Services Public Practice Update

*Stella Leung*

There are rules in our Code of Professional Conduct that affect practitioners in the life cycle of a public practice, yet not all members know the extent of these rules and requirements. Stella Leung from Member Services will outline some key rules that you should know in the various stages of your practice: starting, operating, expanding and winding down. She will also include information on the various services available to practitioners from the Member Services Department of CPABC.

**1:45-3:25PM**
**Breakout Sessions**

### Navigating ASPE

*Diane McDonald*

Do you know where to look to answer your ASPE questions? Finding where & how to look is sometimes more difficult than the accounting question itself. This session will help you navigate ASPE, Knotia, and highlight other tools which can assist you in answering ASPE questions. It will also address common ASPE deficiencies and how to remedy within financial statements. Topics to be addressed include: CPABC practice inspection findings on the application of ASPE; Private Enterprise Advisory Committee activities; CPA Canada and Financial Reporting & Assurance Standards Canada websites.

### More than Bean Counters – Branding and Marketing Your CPA Firm

*Corinne Impey & Grant Smith*

When done right, branding, marketing and communication initiatives can greatly impact your success. Regardless of your accounting firms' size, what you communicate differentiates your firm from others and builds a foundation of trust with your clients. This session, co-presented by a communications specialist and a public practitioner, will explore branding considerations for small firms, as well as online marketing strategies including website design, email marketing and the use of social media to reach and engage both prospective and current clients.

*3:25-3:45PM Refreshment Break*

**3:45-5:00PM**
**Roundtable Discusions**

Attendees will participate in two small roundtable groups. Each roundtable will discuss a particular topic for 30 minutes, in a discussion led by a moderator. This is an opportunity to discuss and exchange ideas, solve problems, and learn from your peers. Come prepared to share, learn and be inspired with new ideas and solutions for your practice. Possible roundtable topics: IT in practice management; Billings and collections; Succession planning; Partnership or other sharing arrangements; Online and cloud computing; Workflow management; HR and staffing; Buying a practice vs. buying a client block; Emergency preparedness, disaster recovery; Client management; and Networking. Registrants will be contacted prior to the conference to select 4 topics of interest, and will be assigned to 2 roundtables based on your choices.

# PD NEXUS: Financial Planning Insights

December 5, 2017 · Vancouver Convention Centre, West Building

Whether you're planning for your own financial future or you have clients who are looking to you for advice, this *PD Nexus*, formerly known as *Personal Financial Planning Conference*, is one you don't want to miss!

Our 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.

The conference is designed for professional accountants and other financial professionals who want to obtain insights into the topic area of financial planning.

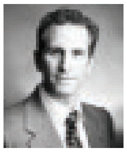
The conference format day will include morning and afternoon plenary presentations and a choice of breakout sessions from two streams throughout the day, and opportunities to network with other financial professionals.

**December 5, 2017**
**Vancouver Convention Centre**

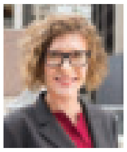
Course Fee: $475
CPD Hours: 7
PD Passport Valid: 1 day

To register, please go to our website at **pd.bccpa.ca/conferences** or email us at **pdreg@bccpca.ca.**

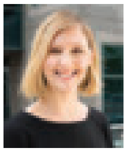
## CONFERENCE SPEAKERS



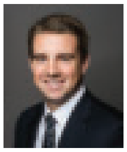
*Stav Adler, CIM, CIWM, FCSI, CPCA* is a retirement analyst and portfolio manager with PI Financial Corp. He specializes in financial analysis for retirement and quantitative investment management. Stav has extensive experience back-testing and stress testing retirement plans to determine their probability of success and providing adjustments and solutions when appropriate.



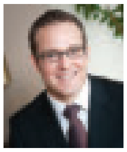
*Andrea Frisby, TEP,* Legacy Tax + Trust Lawyers, focuses her practice on assisting clients with estate and trust planning and administration. She prepares wills, trust documents, powers of attorney and representation agreements for clients, and also provides legal advice on estate and trust administration. Andrea has authored numerous papers in the areas of wills, estate, trusts and capacity issues and is a frequent speaker on these topics.



*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.



*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, with experience as an Institutional Portfolio Manager working with pension plans, university endowments and not-for-profit organizations, focusing on equity and balanced investments portfolios.



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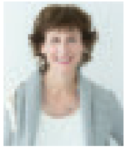
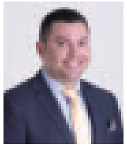


*Tracy Theemes, MA, CFP, FCSI, FDS* is Financial Advisor and co-founder of Sophia Financial Group, Raymond James. Prior to that, Tracy worked as a financial consultant with Smith Barney, a US brokerage firm and as an advisor with a large Canadian bank owned investment firm. She has an M.A. in Counselling 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.



*Chadwick Walker, B.Sc., B.Ed., CIM* is an Investment Advisor with Odlum Brown Limited. In addition to his investment industry accreditations, Chadwick holds a Bachelor of Science in Applied Physics from Simon Fraser University, and a Bachelor of Education from the University of British Columbia. His consultative, scientific approach to investing provides his clients with a clear understanding of their financial situation, so they can be confident and excited about their investment decisions.

### Breakout Panelists

**Jamie Bonham, B.Sc.,** Manager of Corporate Engagement with NEI Investments
**Ian Robertson, CFA, MBA, MA,** Board Member of the Responsible Investment Association and Vice President, Director, Portfolio Manager with Odlum Brown Limited
**Dominique Ramirez,** Director, Corporate Affairs & Corporate Social Responsibility with Goldcorp

## PD NEXUS: FINANCIAL PLANNING INSIGHTS - AGENDA

**88:30-8:35AM**
**Welcome & Introduction**

Welcome and introductory remarks from *Nicola McLaren, Program Director, Professional Development*, CPABC.

**8:35-10:15AM**
**Plenary Session**

### The Psychology of Investing

*Tracy Theemes*

For decades controversy has raged in the world of behaviour and finance. Historically it was assumed that we approach our investing decisions with rationality but recent research has proven that emotions and behavioural biases, both conscious and unconscious are more at work than ever imagined. In this engaging and dynamic workshop we will address the empirical findings on investor behaviour and dig deeper into the thought processes at work in our own investing and financial lives.

*10:15-10:35AM Refreshment Break*

**10:35AM-12:15PM**
**Breakout Sessions**

### Corporate Tax Planning for Private Enterprises

*Shane Onufrehuk*

On July 18, 2017 the Canadian federal Department of Finance issued a paper outlying proposed tax changes that could have significant impacts on the tax planning approaches used by Canadian controlled private corporations (CCPCs) going forward. These legislative changes are now going through a consultative period that ends on October 2, 2017. This seminar will provide an overview of those proposed changes as well as any new directions the government might consider in light of the consultative feedback. Members who service private corporations or who work for CCPCs will have interest in this session.

### The Essential Legal Documents of any Successful Financial Plan

*Christine Muckle & Andrea Frisby*

Learn the "building block" legal documents that are crucial for every financial plan. While many understand a Will is needed, for most clients this is just the beginning. A well-thought-out and comprehensive plan may also consider trusts, marriage/cohabitation agreements, co-ownership agreements, shareholder agreements, and beneficiary designations, to name a few. In addition, incapacity planning documents such as powers of attorney and Representation Agreements are equally important. We will explore these legal documents (and more), and just how they can be used to create a successful financial plan.

*12:15-1:20PM Lunch*

**1:15-1:45PM**
**Plenary Session**

### Ethical Based Investing – Panel Discussion

*Moderator: Chadwick Walker*

*Panelists: Jamie Bonham, Ian Robertson, Dominique Ramirez*

Assembling a successful investment portfolio doesn't necessarily mean setting aside your social values. Unlike many traditional approaches, an ethical investment strategy examines more than just a company's bottom line and takes environmental, social and governance (ESG) factors into consideration. Your investment choices can make a difference in the business world. As the focus of individual investors and professionals shifts beyond financial returns, investment firms are taking note. Join Chadwick Walker and a panel of industry experts for an interactive discussion on ethical-based investing. This session contains 1.5 hours of ethics content.

*3:00-3:20PM Refreshment Break*

**3:20-5:00PM**
**Breakout Sessions**

### Planning Priorities at Different Life Stages

*Trevor O'Reilly*

This seminar will provide an overview of investment planning priorities at different life stages leading up to retirement. It will cover the various investment goals and objectives at different life stages and the best investment vehicles, accounts (i.e. TFSA, RESP, RRSP, etc.) and other financial planning tools to use at each stage. You will come away with a greater understanding of what should be considered at each point in life to set yourself up for financial success now and in retirement.

### Financial Analysis for Retirement Planning

*Stav Adler*

We are living in unprecedented times. With longer life spans, chronic illnesses such as Alzheimer's disease, and changes in family dynamics, the economic reality of retirement has become increasingly difficult to predict and manage. Conventional retirement models underestimate the resources necessary for a financially secure retirement. This session will explore new techniques that back-test and stress test retirement plans to provide a clear picture of a person's sustainable withdrawal rate and their ability to withstand a wide range of adverse events and conditions.

# PD NEXUS: Business Insights

December 6, 2017 · Vancouver Convention Centre, West Building

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, formerly known as *Members in Business & Industry PD Day*, 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.

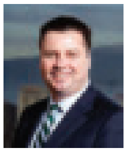
The conference format day will include morning and afternoon plenary sessions, a choice of breakout sessions from two streams throughout the day, and opportunities to network with other financial professionals.

**December 6, 2017**
**Vancouver Convention Centre**

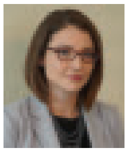
Course Fee: $475
CPD Hours: 7
PD Passport Valid: 1 day

To register, please go to our website at **pd.bccpa.ca/conferences** or email us at **pdreg@bccpca.ca.**

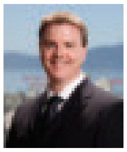
## CONFERENCE SPEAKERS



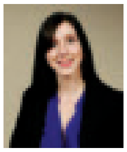
*Kevin Eck, P.Eng., MBA* is a Partner in the Business Tax Incentives Practice and the Western Canadian Practice Leader at Ernst & Young. He provides technical expertise to mining, forestry, manufacturing, technology, biotech and oil & gas clients in helping with SR&ED and other incentives claims. Kevin also acts as EY's SR&ED Mining Industry Leader in Canada and consults with companies in Western Canada on greenhouse gas verification requirements and offset reduction credit programs.



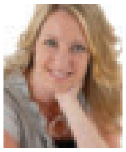
*Lauren Florko,* is a Ph.D. Candidate at Saint Mary's University in Industrial/Organizational Psychology and an HR Consultant based out of Vancouver, British Columbia. She specializes in talent management and for over ten years has worked for various public, private, for-profit, and non-for-profit organizations, both at a local and global level.



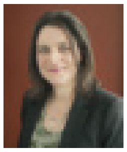
*Rod Hynes, CPA, CA* is a senior manager with 15 years of experience at Ernst & Young in both the Assurance practice and the Business Tax Incentives practice. Rod has over 10 years of experience in preparing and defending SR&ED claims in financial services, mining, pulp and paper, manufacturing, technology and telecommunications, energy sectors, and automotive. Rod has also worked on Capital Asset Reviews, Digital Media Tax credits, Capital investment tax credits and other incentives claims.



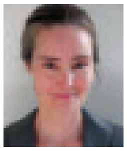
*Sarah Keyes, CPA, CA* is a Principal at CPA Canada. In this role, she leads research efforts addressing sustainability issues and how they relate to organizational decision-making, reporting and corporate governance. She is a subject matter expert in climate change with a deep understanding of the interconnections between climate change and business strategy, risk and performance. Prior to CPA Canada, Sarah worked as an auditor in Mining & Extractives at PricewaterhouseCoopers and as an energy consultant at MNP.



*Sarah Morton* an entrepreneur and tech industry veteran, has been a leader in providing technology solutions to Canada's small and medium businesses since 1995. She was CEO of Cloud8 (formerly Backbone Systems and Networks Corp., which she launched 11 years ago), where she enabled businesses to virtually share servers and resources– or, stated simply, to use "the cloud." In addition, she was the founder of a managed IT service organization and a co-location data facility. Sarah is an Entrepreneur in Residence with the Women's Enterprise Centre of BC and lends her subject matter expertise to Accelerate Okanagan.



*Bridget Noonan, CPA, CA*, a Partner at Clearline CPA, primarily focuses on the provision of assurance services to private and not-for-profit organizations. Bridget is passionate about education and helping the organizations' members, committees, and directors understand accounting and auditing processes. Bridget was with a mid-size firm in Vancouver for 12 years prior to co-founding Clearline CPA, which provides consulting services to CPA firms in all matters related to compliance with professional and regulatory requirements.



*Christie Stephenson* is the Executive Director of the Peter P. Dhillon Centre for Business Ethics at the UBC Sauder School of Business. Prior to joining UBC Sauder in 2016, she spent more than 15 years at leading socially responsible investment firms including Sustainalytics and NEI Investments. She currently serves as a corporate reporting judge for CPA Canada and a governance committee member at BlueShore Financial.

**Breakout Panelists**

**David Crawford, CPA, CMA,** Vice President at Vancouver Region Board of Trade
**Bob Elton, FCPA, FCA,** Executive-in-Residence at Vancity

## PD NEXUS: BUSINESS INSIGHTS - AGENDA

**8:30-8:35AM**
**Welcome & Introduction**

Welcome and introductory remarks from *Simone Leonard, VP, Education & Professional Development*, CPABC.

**8:35-10:15AM**
**Plenary Session**

### Sustainability – A Business Issue

*Moderator: Sarah Keyes*

*Panelists: David Crawford, Bob Elton*

This session will explore sustainability issues and their intersection with business. It is increasingly recognized that social and environmental sustainability issues can have real impacts on businesses' financial performance, especially in the long-term. As an emerging issue for the accounting profession, CPA Canada will provide an overview of its sustainability initiatives, including showcasing the role CPAs can play as change leaders in their organizations. This session will explore real-life examples of how accountants are getting involved in identifying and managing risks and opportunities created by social and environmental issues. This session contains 1.5 hours of ethics content.

*10:15-10:35AM Refreshment Break*

**10:35AM-12:15PM**
**Breakout Sessions**

### Is the Engagement Provided by Your External CPA the Best Fit for Your Needs

*Bridget Noonan*

With all the discussion around the value of an audit and the cost of assurance, it is important for entities to have the information they need to ask for the service that best fits those needs. When third parties, such as a bank, require assurance from an external CPA this does not need to be limited to a review engagement or an audit. Perhaps compliance with a covenant or one specific area of the financial information is most important. This session will provide you with a high-level understanding of the various services an external CPA can provide, along with the scope of the engagements and the cost drivers. This information will allow you to open the dialogue with third parties or your service providers.

### Understanding Big Data

*Lauren Florko*

In an era of fake news, alternative facts, and post-truth, it has become more and more frustrating to find out what is really going on in our world. This session aims to provide basic tips to help participants find and understand source material including statistics. This session also aims to provide participants with a basic understanding of what to look and ask for when presented with big data in the workplace.

*12:15-1:20PM Lunch*

**1:20-3:00PM**
**Plenary Session**

### Rising Expectations of Corporate Reporting: Navigating the Landscape of Non-Financial Disclosure

*Christie Stephenson*

Environmental, social and governance (ESG) issues discussed in the morning plenary are impacting corporate reporting and disclosure. In the past this information has been found in corporate social responsibly reports, not traditionally produced by accountants nor in accordance with accounting standards. However, there are shifts toward non-financial reporting being integrated in more traditional corporate disclosure as national and international initiatives gain traction. It is therefore critical for accountants to understand the shifting landscape of ESG reporting and contemplate what role they should play in the disclosure of non-financial information to investors and other stakeholders including regulators, suppliers and customers. This session will introduce you to ESG frameworks and standards, to enable you to better understand the information reported by organizations and how to use that information in making informed decisions.

*3:00-3:20PM Refreshment Break*

**3:20-5:00PM**
**Breakout Sessions**

### Cash Savings Opportunities in a Fast Paced World

*Kevin Eck & Rod Hynes*

With the speed of business change and the uncertainty in today's markets, it is imperative for companies to save cash wherever they can. There are many incentive and tax credit programs available for companies to take advantage of. Knowing what these incentives are, how to access them and when to access them can give companies an advantage in generating cash savings. This session will review incentives and tax credits that are available, some of which you may have heard of and a few you may not have. Knowledge of what incentives/credits are out there is important, and timing is key.

### Fostering Innovation and Entrepreneurial Thinking

*Sarah Morton*

Entrepreneurial thinking is a strategic advantage for organizations in our fast-paced, rapidly changing world. Encouraging a culture of innovation and entrepreneurial thinking can advance an organizations growth, and enable them to anticipate or effectively react to market changes. This session will focus on how to foster that culture, while leveraging data and information to create a modern and adaptive business environment that leads to organizational success.

# PD HIGHLIGHTS: OCTOBER/NOVEMBER 2017

## Audit & Assurance

### Assurance & Professional Practice Update

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. (1/2 day)

*Oct 24 | Kamloops*
*Oct 26 | Vancouver*
*Oct 31 | Kelowna*
*Nov 3 | Nanaimo*
*Nov 7 | Prince George*
*Nov 8 | Coquitlam*
*Nov 16 | Abbotsford*
*Nov 17 | Victoria*
*Nov 22 | Vancouver*
*Nov 24 | Surrey*

### Audit: Applying Audit Standards to a Small Entity

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. (1 day)

*Oct 30 | Kelowna*
*Nov 15 | Kamloops*
*Nov 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)

*Nov 20 | Vancouver*
*Nov 30 | Coquitlam*
*Dec 11 | Surrey*

### Compilation Engagements: Experienced Practitioners

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. (1/2 day)

*Oct 24 | Abbotsford*
*Oct 24 | Vancouver*
*Oct 24 | Kamloops*
*Nov 3 | Nanaimo*
*Nov 8 | Kelowna*
*Nov 15 | Victoria*
*Nov 17 | Richmond*
*Nov 24 | Surrey*
*Dec 15 } Vancouver*

### Fraud Risk Management Principles & Practices – An Integrated Approach

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. (1 day)

*Nov 20 | Vancouver*
*Dec 1 | Victoria*
*Dec 6 | Surrey*

### Law Society, Real Estate Council and Other Specified Procedures Reports

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. (1/2 day)

*Nov 3 | Vancouver*

### Quality Control Manual for Public Practitioners – Canadian Standards of Quality Control ("CSQC 1")

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"). 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. (1/2 day)

*Nov 22 | Vancouver*

### Review Engagements: Practical Application

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. (1 day)

*Oct 23 | Kamloops*
*Oct 27 | Vancouver*
*Oct 30 | Surrey*
*Nov 2 | Parksville*
*Nov 3 | Abbotsford*
*Nov 6 | Prince George*
*Nov 7 | Kelowna*
*Nov 16 | Richmond*
*Nov 28 | Victoria*
*Dec 4 | Vancouver*

**Please note that these are only some of our offerings in October and November. For the full schedule, visit our website at pd.bccpa.ca.**

## Financial Reporting

### ASPE: A Survey of the Standards

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. (2 days)

*Nov 6-7 | Surrey* *Nov 27-28 | Vancouver*
*Nov 14-15 | Kelowna* *Dec 7-8 | Victoria*

### 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)

*Oct 17 | Prince George* *Dec 1 | Surrey*
*No 10 | Abbotsford* *Dec 12 | Vancouver*

### ASPE: In the Real Estate Industry

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. You will also learn about the disclosure requirements of ASPE and other issues specific to the real estate industry. (1 day)

*Oct 23 | Vancouver* *Nov 16 | Victoria*

### 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)

*Oct 27 | Vancouver* *Nov 8 | Coquitlam*
*Oct 31 | Kelowna* *Nov 17 | Victoria*
*Nov 7 | Surrey*

### 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)

*Nov 3 | Surrey* *Nov 24 | Vancouver*

### IFRS: Mineral Resource Exploration & Mining Industry Basics

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. Content will include: exploration for an evaluation of mineral resources; development stage companies; production stage companies; closure; financial activities; and financial statement presentation, reporting and disclosure. (1 day)

*Nov 10 | Vancouver*

### NFPOs: A Survey of the Standards (Private Sector)

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. (1 day)

*Nov 20 | Vancouver*

### NFPOs: Disclosure and Presentation - From Standards to Words

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, and others, such as; contingencies, commitments, subsequent events, related party transactions, etc. (1 day)

*Nov 14 | Kamloops* *Nov 29 | Vancouver*

### Non-Profit Organizations and Registered Charities: Accounting and Taxation Issues

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. (1 day)

*Oct 25 | Kelowna* *Dec 6 | Vancouver*

### PSAB: The Basics

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. (1 day)

*Oct 27 | Vancouver*
*Dec 8 | Surrey*
*Nov 27 | Victoria*

### PSAB: Beyond the Basics

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. (1 day)

*Nov 30 | Vancouver*
*Dec 6 | Victoria*

### Public Company Reporting: Annual Update

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. 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! (1/2 day)

*Nov 23 | Vancouver*

## Management Accounting & Financial Management

### 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. Finally, it will highlight other measures which must be taken into account to arrive at a detailed assessment of a company's financial health. (1 day)

*Nov 20 | Victoria*
*Nov 23 | Surrey*

### 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. 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. (1 day)

*Nov 3 | Prince George*
*Nov 21 | Vancouver*
*Nov 14 | Victoria*
*Dec 5 | Surrey*

### 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)

*Nov 22 | Vancouver*
*Dec 11 | Prince George*
*Nov 24 | Kamloops*
*Dec 13 | Coquitlam*

### 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)

*Nov 14 | Prince George*
*Nov 16 | Vancouver*
*Nov 15 | Surrey*
*Nov 17 | Kamloops*

### 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. (1 day)

*Oct 24 | Vancouver*
*Nov 16 | Surrey*

## Finance

### 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)

*Nov 7 | Vancouver*
*Nov 23 | Kelowna*
*Nov 14 | Surrey*
*Nov 28 | Prince George*
*Nov 15 | Abbotsford*
*Dec 5 | Victoria*

# PD Highlights

### 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)

*Oct 19 | Vancouver*
*Nov 1 | Surrey*
*Dec 7 | Vancouver*
*Dec 12 | Coquitlam*

### 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)

*Oct 26 | Coquitlam*
*Oct 26 | Kelowna*
*Oct 31 | Parksville*
*Nov 6 | Victoria*
*Nov 9 | Vancouver*
*Nov 17 | Prince George*
*Nov 21 | Surrey*
*Nov 28 | Abbotsford*

### Business Valuations: Beyond the Basics

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. (1 day)

*Oct 27 | Kelowna*
*Nov 24 | Vancouver*
*Dec 7 | Kamloops*
*Dec 13 | Victoria*

### Corporate Finance

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. (1 day)

*Oct 23 | Surrey*
*Nov 3 | Vancouver*
*Nov 9 | Victoria*
*Nov 21 | Kelowna*

### Financing Strategies

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 dive 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. (1 day)

*Nov 8 | Vancouver*

## Information & Business Technology

### 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: 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)

*Oct 24 | Victoria*
*Nov 8 | Vancouver*

### Building a Financial Model of a Company Hands-on | Laptop required

This 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. This is a hands-on seminar. Please bring a laptop with Excel (any version) installed. (1 day)

*Nov 15 | Vancouver*

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

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

*Nov 9 | Vancouver*
*Nov 10 | Surrey*
*Dec 5 | Kelowna*

### Excel: Beyond the Basics Paperless | Not Hands-on | Laptop optional

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. (1 day)

*Nov 3 | Kelowna*

### Excel: Integrating and Preparing Budgets & Forecasts Paperless | Not Hands-on | Laptop optional

Are your budgeting and forecasting processes working as well for you as they should? 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. (1 day)

*Nov 1 | Vancouver*

## PD Highlights

### Excel: Specific Skills for Budgeting, Planning and Forecasting Hands-on | Lab or Classroom

If you need help to improve budgeting, planning and forecasting processes in your business, this 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. 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. (1 day)

*Oct 20 | Abbotsford* *Oct 24 | Vancouver (Lab)*

### Excel: Specific Skills for Creating Custom Solutions with Macros 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. 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. This is a hands-on seminar. Lab sessions will provide desktop computers with the current Excel program installed. (1 day)

*Nov 3 | Vancouver (Lab)*

### 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. 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. (1 day)

*Oct 19 | Surrey* *Nov 8 | Vancouver (Lab)*
*Oct 27 | Coquitlam* *Dec 6 | Prince George*
*Oct 30 | Kamloops*

### Excel PivotTables Hands-on | Lab or Classroom

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. 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. (1 day)

*Nov 1 | Vancouver (Lab)* *Nov 29 | Kelowna*
*Nov 27 | Victoria*

### Excel Tables and Data Models: Efficiently Managing, Analyzing & Reporting Your Data Paperless | Not Hands-on | Laptop optional

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)

*Nov 2 | Surrey* *Nov 30 | Vancouver*

### Excel Tips, Tricks and Techniques for Accountants Paperless | Not Hands-on | Laptop optional

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. (1 day)

*Oct 31 | Vancouver*

### Financial Model: Merger Modeling Hands-on | Laptop required

This 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. 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. This is a hands-on course. Please bring a laptop with Excel (any version) installed. (1 day)

*Nov 16 | Vancouver*

### Financial Modeling in Excel Hands-on | Laptop required

This 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. This is a hands-on course. Please bring a laptop with Excel (any version) installed. (1 day)

*Oct 24 | Vancouver* *Nov 21 | Coquitlam*

### Google is Not Enough: The Best Search Tools You Aren't Using (But Should!) Paperless | Not Hands-on | Laptop optional

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." (1 day)

*Oct 26 | Vancouver*

### LinkedIn Best Practices for Mid-Level & Senior-Level Finance & Accounting Professionals

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. 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. (2 hours)

*Nov 15 | 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 hands-on seminar will utilize assignments and handouts throughout the day. Please bring a laptop with Excel (any version) installed. (1 day)

*Nov 14 | Vancouver*

### Modeling Project Finance: Real Estate Hands-on | Laptop required

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 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. This is a hands-on seminar. Please bring a laptop with Excel (any version) installed. (1 day)

*Oct 31 | Vancouver*

### Rapid Dashboard Development with Power BI Desktop Hands-on | Laptop required

In 2015, 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. This is a hands-on seminar. Please bring a laptop running the free, and *most recent*, version of Power BI desktop. (1 day)

*Oct 25 | Victoria* *Dec 12 | Vancouver*

## Communication

### Becoming a Skilled Negotiator

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. (1 day)

*Oct 25 | Surrey* *Nov 22 | Kelowna*
*Nov 10 | Victoria* *Nov 27 | Vancouver*

### Clear Thinking/Clear Speaking

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. 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)

*Nov 16 | Victoria* *Dec 12 | Vancouver*

### Communicating Effectively Under Pressure

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. (1 day)

*Oct 20 | Victoria* *Nov 9 | Vancouver*
*Oct 27 | Surrey* *Dec 15 | Vancouver*

### Communicating with Influence

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)

*Oct 23 | Kelowna* *Nov 14 | Vancouver*
*Nov 10 | Victoria* *Nov 15 | Surrey*

### Conflict: Changing Viewpoints & Influencing Behaviors

While most people shy away from conflict, properly handled, it can be a wonderful opportunity for creativity, change, growth and mutual profit improvement. 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, T*he Game of Life: Turning Conflict into Cooperation.* (1 day)

*Oct 24 | 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)

*Nov 8 | Vancouver* *Dec 13 | Vancouver*
*Nov 15 | Victoria*

### When it Hits the Fan: A Primer in Crisis Communications Management

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 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.' (1/2 day)

*Nov 22 | Vancouver*

## Problem Solving & Decision Making

### Project Management: Tips & Traps

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; and learn PM best practices and what works for you (1 day)

*Nov 21 | Vancouver*

### Thinking Beyond the Box

Each of us has a mental model of how we think the world works. 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. This course may change your life. We all have the potential to think differently, provided we first rid ourselves of the blind spots that prevent us from achieving our full potential. (1 day)

*Oct 25-26 | 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)

*Oct 17 | Vancouver*
*Oct 19 | Nanaimo*
*Oct 25 | Kelowna*
*Nov 9 | Kamloops*
*Nov 16 | Prince George*
*Nov 28 | Vancouver*
*Nov 30 | Victoria*
*Dec 5 | Coquitlam*

### 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)

*Oct 13 | Abbotsford*
*Oct 17 | Courtenay*
*Oct 18 | Parksville*
*Oct 19 | Surrey*
*Oct 20 | Coquitlam*
*Oct 20 | Vancouver*
*Oct 26 | Richmond*
*Oct 27 | Burnaby*
*Oct 27 | Victoria*
*Nov 7 | Vancouver*
*Nov 10 | Coquitlam*
*Nov 25 | Vancouver*
*Nov 29 | Surrey*
*Dec 5 | Kelowna*
*Dec 8 | Burnaby*
*Dec 8 | Richmond*
*Dec 8 | Vancouver*
*Dec 16 | 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)

*Nov 1 | Vancouver*
*Nov 7 | Abbotsford*
*Nov 8 | Surrey*
*Nov 15 |Vancouver*
*Nov 24 | Victoria*
*Dec 5 | 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)

*Oct 26 | Vancouver*
*Nov 22 | Vancouver*
*Dec 14 | Vancouver*

## Self Management

### Brain Focus: The Power of Full Engagement

The way we're working isn't working. With vast amounts of information pouring in 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. It is packed with tips, stories, and strategies to help your information management skills. (1/2 day)

*Oct 25 | Vancouver*
*Nov 8 | Abbotsford*
*Nov 21 | Kelowna*

### 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 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)

*Oct 26 | Vancouver* *Nov 15 | Prince George*

### Personal Effectiveness: Self Awareness and Balanced Thinking

Successful people have one thing in common – they learn by doing and by applying their experience to day to day activities. Through understanding themselves, they are able to adapt and improve their approach to decision-making and relationships. This 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. (1 day)

*Nov 8 | Kamloops* *Dec 7 | Vancouver*

### Resiliency and Grit: You Have What it Takes to Bounce Back from Adversity and Challenge

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. (1 day)

*Nov 15 |Vancouver*

### Triple Your Reading Speed

Do you have enough time to read? Are you tired of feeling info-whelmed? Too many emails? 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)

*Oct 24 | Vancouver* *Nov 20 | Kelowna*

### What is Your Happiness Practice? It's Time to Ditch the Stress and Find Real Happiness

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. 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. (1 day)

*Nov 16 | Vancouver*

## Teamwork & Leadership

### Implementing Change: How to Anticipate and Avoid Costly Problems

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. (1 day)

*Nov 17 | 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)

*Oct 24 | Kelowna* *Dec 13 | Vancouver*
*Oct 31 | Abbotsford*

### 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)

*Oct 30 | Victoria* *Dec 6 | Surrey*

## Public Practice Management

### Starting a CPA Practice

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. (1 day)

*Nov 14 | Victoria* *Dec 8 | Vancouver*

## Strategy, Governance, Risk & HR

### An Introduction to Strategy Driven Budgeting

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. (1 day)

*Nov 14 | Kelowna* *Nov 20 | Vancouver*
*Nov 22 | Surrey*

# PD Highlights

### Corporate Governance Essentials

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. (1/2 day)

*Nov 2 | Vancouver*

### Employment Law & HR Practices

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. (1 day)

*Oct 23 | Kelowna*
*Dec 8 | Surrey*
*Oct 26 | Abbotsford*

### Risk Management Essentials

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. (1/2 day)

*Nov 2 | Vancouver*

### Workplace Law: All You Wanted to Know About and Were Afraid to Ask

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. (1/2 day)

*Nov 10 | Vancouver*

## Strategy Management Certificate Program

### 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. Exercises will provide opportunities to consider your own role relative to strategy formulation, execution and monitoring, and highlight opportunities to increase personal effectiveness. (1 day)

*Oct 23 | Victoria*
*Dec 4 | Vancouver*
*Oct 30 | 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, 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. (1 day)

*Dec 12 | Vancouver*

### SMCP: Change Management

Why do most change initiatives fail? 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. (1 day)

*Nov 6 | Vancouver*

### 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)

*Nov 27 | Vancouver*

## Taxation

### Advanced Tax Planning Strategies

This 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. It is designed for 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. (1 day)

*Nov 7 | Victoria*
*Nov 24 | Abbotsford*
*Nov 21 | Vancouver*

### BC PST Refresher & Comparison with GST/HST

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. (2 hours)

*Nov 15 | Vancouver*

## PD Highlights

### Catching Up: 5 Years of Income Tax Developments

Income tax changes and "keeping up" is necessarily a continuous process. Unfortunately, many people don't have the time or resources and 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. (1 day)

*Oct 19 | Kelowna*
*Oct 27 | Victoria*
*Nov 7 | Surrey*
*Nov 10 | Abbotsford*
*Nov 20 | Vancouver*

### Corporate Reorganizations

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 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. (1 day)

*Nov 14 | 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)

*Oct 20 | Vancouver*
*Oct 25 | Coquitlam*
*Oct 26 | Victoria*
*Nov 1 | Parksville*
*Nov 2 | Kelowna*
*Nov 9 | Abbotsford*
*Dec 13 | Surrey*

### Getting a GRIP on RDTOH, CDA & Other Tax Accounts

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. (1 day)

*Nov 7 | Vancouver*
*Nov 16 | Kelowna*

### GST/HST & Real Property

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. (1 day)

*Oct 30 | Surrey*
*Nov 7 | Victoria*
*Dec 15 | 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)

*Oct 27 | Kamloops*
*Oct 30 | Parksville*
*Nov 6 | Victoria*
*Nov 8 | Vancouver*
*Nov 22 | Prince George*
*Nov 27 | Kelowna*
*Dec 7 | Coquitlam*
*Dec 13 | Surrey*

### 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. (1 day)

*Nov 14 | Vancouver*

### 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. (2 days)

*Nov 16-17 | Vancouver*
*Nov 20-21 | Abbotsford*
*Nov 30-Dec 1 | Victoria*
*Dec 11-12 | Surrey*

### 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)

*Oct 18 | Vancouver*
*Oct 24 | Coquitlam*
*Oct 24 | Kelowna*
*Oct 26 | Surrey*
*Oct 27 | Vancouver*
*Nov 1 | Abbotsford*
*Nov 3 | Parksville*
*Nov 6 | Vancouver*
*Nov 7 | Courtenay*
*Nov 8 | Victoria*
*Nov 9 | Nanaimo*
*Nov 9 | Richmond*
*Nov 15 | Vancouver*
*Nov 20 | Kamloops*
*Nov 20 | Vancouver*
*Nov 24 | Burnaby*
*Nov 25 | Vancouver*
*Nov 27 | Victoria*
*Nov 28 | Vancouver*
*Nov 29 | Prince George*
*Dec 4 | Kelowna*
*Dec 7 | Surrey*
*Dec 11 | Vancouver*
*Dec 13 | Vancouver*
*Dec 16 | Vancouver*

### Interest, Penalties and Taxpayer Relief

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. (1/2 day)
*Nov 9 | Vancouver*

### Restructuring Private Corporate Groups

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. (1/2 day)
*Nov 9 | Vancouver*

### RIP: Estate and Testamentary Trust Returns

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. The seminar will touch on some estate planning issues, but these will generally focus on matters which can be addressed in the course of preparing these returns. (1 day)
*Nov 17 | Vancouver*

### RIP: Estate Planning to Minimize Tax Leakage

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. (1 day)
*Nov 10 | Vancouver* *Nov 21 | Prince George*
*Nov 21 | Surrey* *Dec 7 | Victoria*

### RIP: Tax Compliance Matters Related to Terminal Filing Preparations

This 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. (1 day)
*Nov 14 | Vancouver*

### Tax for Controllers

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. (2 days)
*Oct 24-25 | Vancouver* *Dec 12-13 | Victoria*
*Nov 22-23 | Surrey*

### Tax Issues for Private Corporate Groups

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. (1 day)
*Nov 2 | Victoria* *Nov 15 | Kelowna*
*Nov 8 | Vancouver* *Dec 7 | Surrey*

### Taxation of Domestic Trusts: Basic

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, each 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. (1 day)
*Oct 27 | Vancouver* *Dec 8 | Victoria*

### Taxation of Domestic Trusts: Advanced

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. Practitioners wishing to obtain a comprehensive knowledge should consider taking both the *Basic* and *Advanced* courses. (1 day)
*Nov 10 | Vancouver*

### Taxation of Employee Benefits

This 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. They will also enhance their ability to advise on tax-effective employee remuneration strategies using benefit plans. (1/2 day)
*Nov 10 | Nanaimo*

### To Be or Not to Be: The Executor – Powers, Obligations and Liabilities

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. (2 hours)
*Nov 9 | Vancouver*

### U.S. Taxation of Individuals: Basic

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. (1 day)
*Oct 26 | Vancouver*

### U.S. Taxation of U.S. Citizens Living Abroad

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. (1 day)
*Nov 9 | Vancouver*

## Wealth Management

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

The stock market crash of 2008 has proven one thing: traditional retirement planning advice is way too risky. 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. This course will detail the non-traditional view to money management that many investment advisors don't want to talk about. (1 day)
*Oct 26 | Kamloops* *Nov 10 | Vancouver*
*Nov 2 | Nanaimo* *Dec 15 | Victoria*

### Introduction to Portfolio and Investment Management Techniques

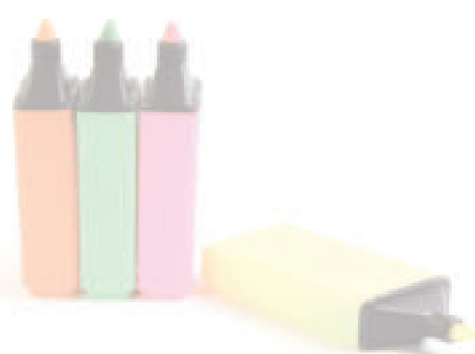
This seminar will provide you with an understanding of basic and intermediate portfolio and investment management techniques for use in your own investment portfolio. Participants will learn the building blocks of portfolio and investment management used by professional advisors. You will come away with a greater understanding of how to manage your own portfolio, and/or a better benchmark against which to gauge your personal financial advisor. (1/2 day)
*Nov 7 | Victoria* *Nov 8 | Vancouver*

### The Procrastinator's Guide to Retirement

Let's face it, planning and saving for retirement is not easy. This course will take you step-by-step though planning and saving for retirement starting in your 50s and the best way to fund your retirement years. It is an easy-to-follow plan for retirement in ten years or less. (1 day)
*Nov 3 | Vancouver* *Nov 16 | Prince George*
*Nov 9 | Kelowna*

### 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)
*Oct 27 | Coquitlam* *Nov 17 | Vancouver*



# PD CALENDAR: October 1 – November 17, 2017

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

## VANCOUVER

| | |
|---|---|
| 17-Oct | Business Ethics - It Starts With You |
| 18-Oct | Income Tax Update 2017 |
| 19-Oct | Budgeting & Financial Mgmt: Understanding Budgeting Variance |
| 19-Oct | Wiring Your Brain for High Impact Leadership |
| 19-Oct | Assurance & Auditing Standards Update |
| 20-Oct | Ethical Principles and the Accounting Profession |
| 20-Oct | Everyday Income Tax Issues for the General Practitioner |
| 23-Oct | ASPE: In the Real Estate Industry |
| 23-Oct | GST/HST: The Basics |
| 24-Oct | Compilation Engagements: Experienced Practitioners |
| 24-Oct | Process Improvement and Mapping |
| 24-Oct | Financial Modeling in Excel |
| 24-Oct | Excel: Specific Skills for Budgeting, Planning & Forecasting |
| 24-Oct | Triple Your Reading Speed |
| 24-Oct | Conflict: Changing Viewpoints & Influencing Behaviors |
| 24-Oct | Tax for Controllers *(2 days)* |
| 25-Oct | Brain Focus: The Power of Full Engagement |
| 25-Oct | Thinking Beyond the Box |
| 25-Oct | PD Nexus: Public Practice Insights |
| 26-Oct | Assurance & Professional Practice Update |
| 26-Oct | Google is Not Enough: The Best Search Tools You Aren't Using |
| 26-Oct | Understanding and Embracing Ethics in the Workplace |
| 26-Oct | Critical Thinking and Self Reflection |
| 26-Oct | Sharpening Your Business Writing Skills |
| 26-Oct | U.S. Taxation of Individuals: Basic |
| 27-Oct | IFRS: Update 2017 |
| 27-Oct | Review Engagements: Practical Application |
| 27-Oct | PSAB: The Basics |
| 27-Oct | Income Tax Update 2017 |
| 27-Oct | Taxation of Domestic Trusts: Basic |
| 30-Oct | Starting a CPA Practice (dedicated) |
| 30-Oct | SMCP - Strategic Planning |
| 31-Oct | ASPE: A Survey of the Standards (dedicated) |
| 31-Oct | Modeling Project Finance: Real Estate |
| 31-Oct | Excel Tips, Tricks and Techniques for Accountants |
| 1-Nov | Excel: Integrating and Preparing Budgets & Forecasts |
| 1-Nov | Excel PivotTables |
| 1-Nov | Shades of Grey - Ethics in the Workplace |
| 2-Nov | Risk Management Essentials |
| 2-Nov | Corporate Governance Essentials |
| 3-Nov | Law Society, Real Estate Council & Other Specified Procedure |
| 3-Nov | The Procrastinator's Guide to Retirement |
| 3-Nov | Corporate Finance |
| 3-Nov | Excel: Specific Skills Creating Custom Solutions with Macros |
| 3-Nov | Gateway to Membership: Welcome to the Pros |
| 6-Nov | SMCP - Change Management |
| 6-Nov | Income Tax Update 2017 |
| 7-Nov | Budgeting & Financial Mgmt: Beyond Traditional Budgeting |
| 7-Nov | Ethical Principles and the Accounting Profession |
| 7-Nov | Getting a GRIP on RDTOH, CDA & Other Tax Accounts |
| 8-Nov | Introduction to Portfolio and Investment Mgt Techniques |
| 8-Nov | Financing Strategies |
| 8-Nov | An End to Manual Effort in Excel: Power Query |
| 8-Nov | Excel: The Next Level of Skills |
| 8-Nov | Sharpening Your Business Writing Skills |
| 8-Nov | Tax Issues for Private Corporate Groups |
| 8-Nov | GST/HST: Beyond the Basics |
| 9-Nov | Business Valuations: The Basics |
| 9-Nov | Creating Vibrant Dashboards |
| 9-Nov | Communicating Effectively Under Pressure |
| 9-Nov | To Be or Not to Be: The Executor |
| 9-Nov | Restructuring Private Corporate Groups |
| 9-Nov | Interest, Penalties and Taxpayer Relief |
| 9-Nov | U.S. Taxation of U.S. Citizens Living Abroad |
| 10-Nov | Enough Bull: How to Retire Well Without the Stock Market |
| 10-Nov | IFRS: Mineral Resource Exploration & Mining Industry Basics |
| 10-Nov | Workplace Law: All You Wanted to Know About |
| 10-Nov | RIP: Estate Planning to Minimize Tax Leakage |
| 10-Nov | Taxation of Domestic Trusts: Advanced |
| 14-Nov | Managing Financial Data With Excel |
| 14-Nov | Communicating with Influence |
| 14-Nov | RIP: Tax Compliance Matters Related to Terminal Filing Prep |
| 14-Nov | Corporate Reorganizations |
| 14-Nov | Income Tax Issues Dealing with Real Estate |
| 15-Nov | LinkedIn Best Practices for Fin. & Accounting Professionals |
| 15-Nov | Building a Financial Model of a Company |
| 15-Nov | Shades of Grey - Ethics in the Workplace |
| 15-Nov | Resiliency & Grit: Bounce Back from Adversity and Challenge |
| 15-Nov | Triple Your Reading Speed |
| 15-Nov | BC PST Refresher & Comparison with GST/HST |
| 15-Nov | Income Tax Update 2017 |
| 16-Nov | Practical Tips for Controllers & CFOs |
| 16-Nov | Unveiling the Retirement Myth |
| 16-Nov | Financial Model: Merger Modeling |
| 16-Nov | What Is Your Happiness Practice? |
| 16-Nov | Income Tax Planning Refresher for Corporate Tax |
| 17-Nov | The Simplest Personal Strategy Ever |
| 17-Nov | Implementing Change: Anticipate & Avoid Costly Problems |
| 17-Nov | Stress and the Challenge Response: How to Come Back Stronger |
| 17-Nov | RIP: Estate and Testamentary Trust Returns |

**Our Fall 2017/Winter 2018 program runs to the end of March. For dates past November 17, please go to our website, watch for the next edition of PD Pathways, or consult the Fall/Winter PD Catalogue.**

# PD Calendar

## ABBOTSFORD

13-Oct Ethical Principles and the Accounting Profession
20-Oct Excel: Specific Skills for Budgeting, Planning & Forecasting
24-Oct Compilation Engagements: Experienced Practitioners
26-Oct Employment Law & HR Practices
31-Oct Leadership and Coaching
1-Nov Income Tax Update 2017
3-Nov Review Engagements: Practical Application
7-Nov Shades of Grey - Ethics in the Workplace
8-Nov Brain Focus: The Power of Full Engagement
9-Nov Everyday Income Tax Issues for the General Practitioner
10-Nov ASPE: Disclosure & Presentation - From Standards to Words
10-Nov Catching Up: 5 Years of Income Tax Developments
15-Nov Budgeting & Financial Mgmt: Beyond Traditional Budgeting
16-Nov Assurance & Professional Practice Update

## BURNABY

27-Oct Ethical Principles and the Accounting Profession

## COQUITLAM

20-Oct Ethical Principles and the Accounting Profession
24-Oct Income Tax Update 2017
25-Oct Everyday Income Tax Issues for the General Practitioner
26-Oct Business Valuations: The Basics
27-Oct The Simplest Personal Strategy Ever
27-Oct Excel: The Next Level of Skills
8-Nov Assurance & Professional Practice Update
8-Nov IFRS: Update 2017
10-Nov Ethical Principles and the Accounting Profession

## COURTENAY

17-Oct Ethical Principles and the Accounting Profession
7-Nov Income Tax Update 2017

## KAMLOOPS

23-Oct Review Engagements: Practical Application
24-Oct Compilation Engagements: Experienced Practitioners
24-Oct Assurance & Professional Practice Update
26-Oct Enough Bull: How to Retire Well Without the Stock Market
27-Oct GST/HST: Beyond the Basics
30-Oct Excel: The Next Level of Skills
8-Nov Personal Effectiveness: Self Awareness & Balanced Thinking
9-Nov Business Ethics - It Starts With You
14-Nov NFPOs: Disclosure & Presentation - From Standards to Words
15-Nov Audit: Applying Audit Standards to a Small Entity
17-Nov Practical Tips for Controllers & CFOs

## KELOWNA

19-Oct Catching Up: 5 Years of Income Tax Developments
23-Oct Communicating with Influence
23-Oct Employment Law & HR Practices
24-Oct Leadership and Coaching
24-Oct Income Tax Update 2017
25-Oct Non-Profit Organizations & Registered Charities: Acc & Tax
25-Oct Business Ethics - It Starts With You
26-Oct Business Valuations: The Basics
27-Oct Business Valuations: Beyond the Basics
27-Oct Effective Management Skills
30-Oct Audit: Applying Audit Standards to a Small Entity
31-Oct Assurance & Professional Practice Update
31-Oct IFRS: Update 2017
2-Nov Everyday Income Tax Issues for the General Practitioner
3-Nov Excel: Beyond the Basics
7-Nov Review Engagements: Practical Application
8-Nov Compilation Engagements: Experienced Practitioners
9-Nov The Procrastinator's Guide to Retirement
14-Nov ASPE: A Survey of the Standards
14-Nov An Introduction to Strategy Driven Budgeting
15-Nov Tax Issues for Private Corporate Groups
16-Nov Getting a GRIP on RDTOH, CDA & Other Tax Accounts
17-Nov Unveiling the Retirement Myth

## NANAIMO

19-Oct Business Ethics - It Starts With You
2-Nov Enough Bull: How to Retire Well Without the Stock Market
3-Nov Compilation Engagements: Experienced Practitioners
3-Nov Assurance & Professional Practice Update
9-Nov Income Tax Update 2017
10-Nov Taxation of Employee Benefits

## PARKSVILLE

18-Oct Ethical Principles and the Accounting Profession
30-Oct GST/HST: Beyond the Basics
31-Oct Business Valuations: The Basics
1-Nov Everyday Income Tax Issues for the General Practitioner
2-Nov Review Engagements: Practical Application
3-Nov Income Tax Update 2017

## PRINCE GEORGE

17-Oct ASPE: Disclosure & Presentation - From Standards to Words
3-Nov Documenting Your Organization's Financial Processes
6-Nov Review Engagements: Practical Application
7-Nov Assurance & Professional Practice Update
14-Nov Practical Tips for Controllers & CFOs
15-Nov Critical Thinking and Self Reflection
16-Nov The Procrastinator's Guide to Retirement
16-Nov Business Ethics - It Starts With You
17-Nov Business Valuations: The Basics

## RICHMOND

26-Oct Ethical Principles and the Accounting Profession
9-Nov Income Tax Update 2017
16-Nov Review Engagements: Practical Application
17-Nov Compilation Engagements: Experienced Practitioners

# PD Calendar

## SURREY

| | |
|---|---|
| 19-Oct | Excel: The Next Level of Skills |
| 19-Oct | Ethical Principles and the Accounting Profession |
| 23-Oct | Corporate Finance |
| 25-Oct | Becoming a Skilled Negotiator |
| 26-Oct | Income Tax Update 2017 |
| 27-Oct | Communicating Effectively Under Pressure |
| 30-Oct | Review Engagements: Practical Application |
| 30-Oct | GST/HST & Real Property |
| 1-Nov | Budgeting & Financial Mgmt: Understanding Budgeting Variance |
| 2-Nov | Excel Tables and Data Models: Efficiently Managing Your Data |
| 3-Nov | IFRS: Leases |
| 6-Nov | ASPE: A Survey of the Standards |
| 7-Nov | IFRS: Update 2017 |
| 7-Nov | Catching Up: 5 Years of Income Tax Developments |
| 8-Nov | Shades of Grey - Ethics in the Workplace |
| 10-Nov | Creating Vibrant Dashboards |
| 14-Nov | Budgeting & Financial Mgmt: Beyond Traditional Budgeting |
| 15-Nov | Practical Tips for Controllers & CFOs |
| 15-Nov | Communicating with Influence |
| 16-Nov | Process Improvement and Mapping |

## VICTORIA

| | |
|---|---|
| 20-Oct | Communicating Effectively Under Pressure |
| 23-Oct | SMCP - Strategic Planning |
| 24-Oct | An End to Manual Effort in Excel: Power Query |
| 25-Oct | Rapid Dashboard Development with Power BI Desktop |
| 26-Oct | Everyday Income Tax Issues for the General Practitioner |
| 27-Oct | Ethical Principles and the Accounting Profession |
| 27-Oct | Catching Up: 5 Years of Income Tax Developments |
| 30-Oct | Wiring Your Brain for High Impact Leadership |
| 2-Nov | Tax Issues for Private Corporate Groups |
| 6-Nov | Business Valuations: The Basics |
| 6-Nov | GST/HST: Beyond the Basics |
| 7-Nov | Introduction to Portfolio and Investment Mgt Techniques |
| 7-Nov | Advanced Tax Planning Strategies |
| 7-Nov | GST/HST & Real Property |
| 8-Nov | Income Tax Update 2017 |
| 9-Nov | Corporate Finance |
| 10-Nov | Communicating with Influence |
| 10-Nov | Becoming a Skilled Negotiator |
| 14-Nov | Starting a CPA Practice |
| 14-Nov | Documenting Your Organization's Financial Processes |
| 15-Nov | Compilation Engagements: Experienced Practitioners |
| 15-Nov | Sharpening Your Business Writing Skills |
| 16-Nov | ASPE: In the Real Estate Industry |
| 16-Nov | Clear Thinking/Clear Speaking |
| 17-Nov | Assurance & Professional Practice Update |
| 17-Nov | IFRS: Update 2017 |


### 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

# 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)

Basic Tax Compliance in Self-Employment
BC PST Refresher & Comparison with GST/HST
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
Negotiating: Challenges & Pitfalls
Planning for a Business
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 (Oct 1, 2017-Jan 31, 2018)

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, or email 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)

Advanced Excel Functions and Formulas
Excel Essentials for the Busy Professional
Excel Best Practices
Excel Techniques for Detecting and Preventing Fraud
Integrating Excel with Word and PowerPoint
Introduction to Excel Macros
Microsoft Access Fundamentals
Microsoft Office 2016 – Improving Productivity with New Features
Microsoft Outlook – Organizing the Inbox
PDF Forms – Retire the Typewriter
Power Up PowerPoint
PivotTables 101
Profiting with Excel's Best New Features
Technology Update
Top Excel Tips and Tricks
Working Effectively from Anywhere

## PD Passports for 2017-2018

**Valid for CPABC PD seminars – September 1, 2017-August 31, 2018**

The Personal and Flexi PD Passports are savings programs for all members and other professionals who take multiple professional development seminars with CPABC PD throughout the year. For the price of a 2017-2018 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.

### Examples of Savings

Registering for 6 seminars at regular cost (3@$425, 3@$450) = $2,625
1 Personal Passport @ early bird price $1,450 = Savings of $1,175
1 Flexi Passport @ early bird price $1,850 = Savings of $775

### Other Benefits

Registering for 6 seminars at regular cost (3@$425, 3@$450) = $2,625

- Convenience – register for courses at any time after your passport purchase without entering further payment
- Easy way to meet your CPD reporting requirements – one PD Passport straddles two CPD reporting years
- Budget education activities for the coming year conveniently
- Explore new areas of practice, or update career advancing skills at a fraction of the regular price
- Passports are eligible for our web-based seminars

## Personal PD Passport

### Passport Price - $1,650 + GST

For individual members of CPABC. This passport is non-transferable – only the passport holder can use it.

## Flexi PD Passport

### Passport Price - $2,050 + GST

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

Please go to the PD website at pd.bccpa.ca to purchase your PD Passport, or contact us at pdreg@bccpa.ca if you have any questions.

**Visit the PD website at pd.bccpa.ca to purchase your PD Passport. If you have any questions about the Passport or our program, please email pdreg@bccpa.ca and one of our PD team members will get back to you.**

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