CPABC PROFESSIONAL DEVELOPMENT
Fall 2017 PD Nexus Conference Days

Public Practice Insights
(formerly Practitioners' Potluck)
October 25, 2017 | Vancouver Convention Center West

Financial Planning Insights
(formerly Personal Financial Planning Conference)
December 5, 2017 | Vancouver Convention Center West

Business Insights
(formerly Members in Business & Industry PD Day)
December 6, 2017 | Victoria Conference Centre

pd.bccpa.ca/pdnexus

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.

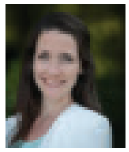
This conference is designed for practitioners in public practice in BC, particularly sole practitioners and members of small to medium-sized firms.

October 25, 2017
Vancouver Convention Centre

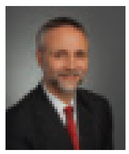
Course Fee: $475
CPD Hours: 7
PD Passport Valid: 1 day

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

CONFERENCE SPEAKERS

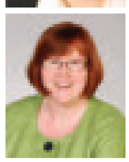


Corinne Impey is Founder of Six Words Communication Corp., and is a versatile, action-oriented communication specialist. She has worked with accounting firms, large corporations and non-profits to solve communication challenges, build brands and drive business results. Corinne holds a journalism degree 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.

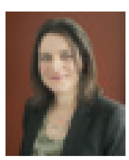


Ed Kroft, Q.C., CPA(Hon) is a partner in the firm of Blake Cassels & Graydon LLP where he leads the tax controversy and litigation group. He appears before all levels of court, including Supreme Court of Canada, Federal Court of Appeal, Federal Court and Tax Court of Canada, and acts for clients in transfer 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

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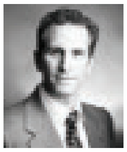
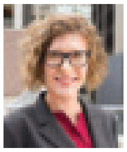
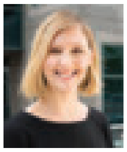
CONFERENCE SPEAKERS



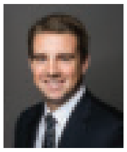
Stav Adler, CIM, CIWM, FCSI, CPCA is a retirement analyst and portfolio manager with PI Financial Corp. He specializes in financial analysis for retirement and quantitative investment management. Stav has extensive experience back-testing and stress testing retirement plans to determine their probability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



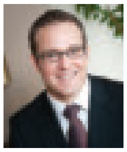
Andrea Frisby, TEP, Legacy Tax + Trust Lawyers, focuses her practice on assisting clients with estate and trust planning and administration. She prepares wills, trust documents, powers of attorney and representation agreements for clients, and also provides legal advice on estate and trust administration. 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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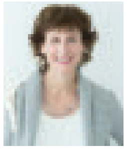
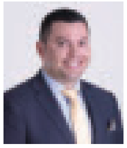


Tracy Theemes, MA, CFP, FCSI, FDS is Financial Advisor and co-founder of Sophia Financial Group, Raymond James. Prior to that, Tracy worked as a financial consultant with Smith Barney, a US brokerage firm and as an advisor with a large Canadian bank owned investment firm. She has an M.A. in Counselling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

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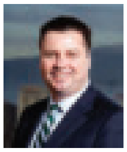
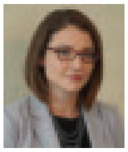
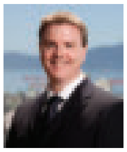
CONFERENCE SPEAKERS



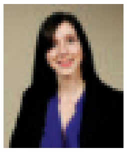
Kevin Eck, P.Eng., MBA is a Partner in the Business Tax Incentives Practice and the Western Canadian Practice Leader at Ernst & Young. He provides technical expertise to mining, forestry, manufacturing, technology, biotech and oil & gas clients in helping with SR&ED and other incentives claims. Kevin 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.



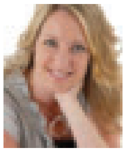
Lauren Florko, is a Ph.D. Candidate at Saint Mary's University in Industrial/Organizational Psychology and an HR Consultant based out of Vancouver, British Columbia. She specializes in talent management and for over ten years has worked for various public, private, for-profit, and non-for-profit organizations,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



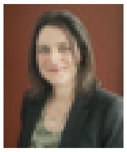
Rod Hynes, CPA, CA is a senior manager with 15 years of experience at Ernst & Young in both the Assurance practice and the Business Tax Incentives practice. Rod has over 10 years of experience in preparing and defending SR&ED claims in financial services, mining, pulp and paper, manufacturing, technology 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.



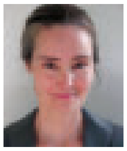
Sarah Keyes, CPA, CA is a Principal at CPA Canada. In this role, she leads research efforts addressing sustainability issues and how they relate to organizational decision-making, reporting and corporate governance. She is a subject matter expert in climate change with a deep understanding of the interconnections 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.