CHARTERED PROFESSIONAL ACCOUNTANTS
BRITISH COLUMBIA

CPABC PROFESSIONAL DEVELOPMENT

Fall 2017/Winter 2018 PD Nexus Conference Days

Financial Planning Insights

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

Business Insights

(formerly Members in Business & Industry PD Day)
December 6, 2017 | Vancouver Convention Centre West

Beyond Financial Reporting Insights

February 20, 2018 | Vancouver Convention Centre West

pd.bccpa.ca/pdnexus

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.

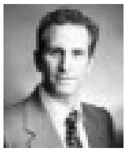
The conference format day will include morning and afternoon plenary presentations and a choice of breakout sessions from two streams throughout the day, and opportunities to network with other financial professionals.

December 5, 2017
Vancouver Convention Centre

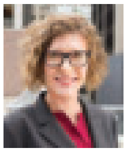
Course Fee: $475
CPD Hours: 7
PD Passport Valid: 1 day

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

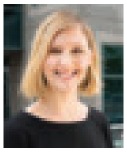
CONFERENCE SPEAKERS



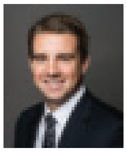
Stav Adler, CIM, CIWM, FCSI, CPCA is a retirement analyst and portfolio manager with PI Financial Corp. He specializes in financial analysis for retirement and quantitative investment management. Stav has extensive experience back-testing and stress testing retirement plans to determine their probability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



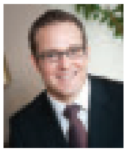
Andrea Frisby, TEP, Legacy Tax + Trust Lawyers, focuses her practice on assisting clients with estate and trust planning and administration. She prepares wills, trust documents, powers of attorney and representation agreements for clients, and also provides legal advice on estate and trust administration.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



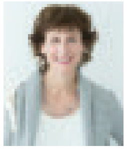
Christine Muckle, JD is a lawyer at Legacy Tax + Trust Lawyers where she practices in the area of estate planning, trust and estate administration, and related tax matters, with a focus on cross border U.S.-Canada planning. Christine also advises U.S. citizens and green card holders with respect to U.S. 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.



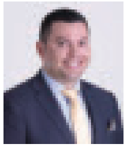
Trevor O'Reilly, CFA is an Investment Counsellor with RBC PH&N Investment Counsel, where he manages discretionary investment portfolios for high net worth individuals, families, businesses, and not-for-profit organizations. He has been in the investment industry since 2007, with experience as an Institutional Portfolio Manager working with pension plans, university endowments and not-for-profit organizations, focusing on equity and balanced investments portfolios.



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 professional development, and had been involved in teaching and course development.



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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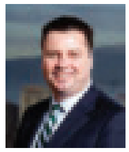
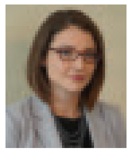
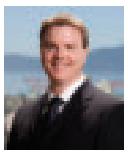
CONFERENCE SPEAKERS



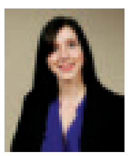
Kevin Eck, P.Eng., MBA is a Partner in the Business Tax Incentives Practice and the Western Canadian Practice Leader at Ernst & Young. He provides technical expertise to mining, forestry, manufacturing, technology, biotech and oil & gas clients in helping with SR&ED and other incentives claims. Kevin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

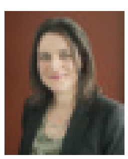


Rod Hynes, CPA, CA is a senior manager with 15 years of experience at Ernst & Young in both the Assurance practice and the Business Tax Incentives practice. Rod has over 10 years of experience in preparing and defending SR&ED claims in financial services, mining, pulp and paper, manufacturing, technology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

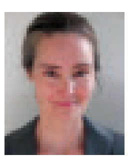


Sarah Keyes, CPA, CA is a Principal at CPA Canada. In this role, she leads research efforts addressing sustainability issues and how they relate to organizational decision-making, reporting and corporate governance. She is a subject matter expert in climate change with a deep understanding of the interconnections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

10:15-10:35AM Refreshment Break

10:35AM-12:15PM
Breakout Sessions

How to Make the Most of the Services of Your External CPA

Bridget Noonan

Are you sure that the engagement from your external CPA is the best fit for your 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. This session will provide you with a high-level understanding of the various services an external CPA can provide, along with the scope of these engagements and the cost drivers. This information will allow you to open the dialogue with third parties or your service providers to explore the many options for assurance reports and find the best fit for your company.

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 NEXUS: Beyond Financial Reporting Insights

February 20, 2018 · Vancouver Convention Centre, West Building

Our Beyond Financial Reporting Insights conference is geared specifically to help you develop your awareness and capabilities in aspects of your work that may be outside of your core responsibilities, such as Human Resources, Information Technology, Change, and Communications. These are topics that you may be managing "off the side of your desk" – and we aim to bring them together to provide you with a fresh – and broader – perspective on professional development.

Our two keynote speakers will anchor the morning and afternoon. Scott Friesen will share ideas in managing all your projects and tasks efficiently. Danny Timmins will discuss cyber security and data breaches, and how you can protect your business from such attacks.

Don't miss the opportunity to be part of this high-value conference day, and the chance to network with your peers.

February 20, 2018
Vancouver Convention Centre

Course Fee: $475
CPD Hours: 7
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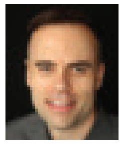
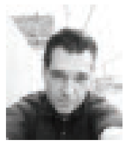
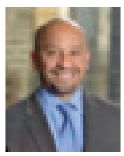
CONFERENCE SPEAKERS



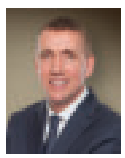
Scott Friesen is not too busy. He's productive. There's a difference. As a 'busyness killer' and founder of Simpletivity.com, Scott helps people improve their productivity. Managing email overload, never ending to-do lists, and technology distractions are among his specialties. Through speeches and workshops, Scott provides powerful tools to those who want more out of their day. He helps others to get more done and to do it with less stress. Because being too busy isn't productive.



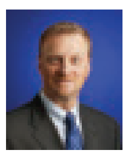
Carson McKee has taught courses in Management Skills for the CPA that focus on HR issues, people management and motivation. Carson has over 12 years of experience in marketing and digital transformation in business and a depth of international brand experience with Ford, NFL, Denny's, NHL teams, and Circle K. As an outside the box thinker, Carson brings an energy and a level of approachability to provide insight into complex topics and situations.



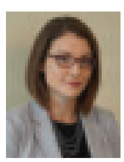
Christian Codrington, CPHR, is currently the Director of Human Resources for the Industry Training Authority as well Principal for Forum HR, a consulting firm providing HR services to small and medium sized businesses. Prior to these roles Christian held senior management positions with the association for HR professionals in BC, Starbucks Coffee Canada and Best Buy Canada. His undergraduate at Simon Fraser University is complemented by Mediation and Conflict Resolution certifications from the Justice Institute of BC.



Danny Timmins, CISSP, is MNP's National Cyber Security Leader and a member of the firm's Enterprise Risk Services team. Drawing on more than 20 years of experience, Danny is responsible for leading and mentoring an experienced, highly skilled cyber security team in the delivery of customized, client-focused cyber security managed services, technology solutions and professional services. By focusing on deliverables that fit clients' unique business needs and objectives, he helps organizations improve awareness and reduce and manage overall cyber security risk.



Mark Moran, CPA,CA, CISA, CRISC, CRMA has over 24 years of public accounting, assurance, and advisory experience, focusing on risk management, internal controls, project management, IT audit, and assurance with respect to complex projects, business processes and information systems. Mark is actively involved in the IT and Business communities through BC and Western Canada, and is an accomplished educational speaker on topics related to internal control, internal audit, IT security, IT audit and risk management.



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.

PD NEXUS: BEYOND FINANCIAL REPORTING INSIGHTS - AGENDA

8:30-8:35AM
Welcome & Introduction

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

8:35-10:15AM
Plenary Session

Own Your Projects: Task Management for Powerful Results

Scott Friesen

Do you have too much on your plate right now? How many projects and tasks do you need to complete this week? Learn efficient ways to manage all of your commitments and work at your productive best. In this actionable session, you'll learn: how to break overwhelming projects into manageable tasks; why prioritizing your work actually hurts productivity; how to develop a daily routine to focus on your most important tasks; and how to prevent procrastination and achieve greater focus.

10:15-10:35AM Refreshment Break

10:35AM-12:15PM
Breakout Sessions

HR Management in an Environment of Rapid Technology Change

Carson McKee

In an increasingly automated workplace, technology is changing the concept of "what work is". The role of the employee and management structures are changing. Rapid technological change can produce fear, excitement and anxiety among the people in your organization and even in you. This session provides a look at the current state and near-term future to help unpack and reframe these changes in order to develop successful organizational strategies for people management.

Essential HR Processes and Systems

Christian Codrington

In your role, are you faced with a deluge of 'best practices', programs, and systems designed to get the most out of your workforce? How do you choose from among them and what are the HR must-haves for any organization? How are you measuring the value of your investment in your people? In this interactive session, participants will develop a process to audit and align HR systems to operational goals and focus on initiatives best suited for their enterprise.

12:15-1:20PM Lunch

1:20-3:00PM
Plenary Session

Cyber Security: Protecting your Business in a Digital World

Danny Timmins

In an increasingly connected world, security has become an urgent issue for companies. While data breaches at big corporations continue to make headlines, cyber attacks on smaller businesses are quietly on the rise. In this session, you'll learn some of the common challenges from data breaches like ransom-ware, hacking and other social engineering techniques. You'll leave with an understanding of how you can prepare and protect your business from a cyber attack.

3:00-3:20PM Refreshment Break

3:20-5:00PM
Breakout Sessions

Designing and Documenting Internal Controls – "Do I really need to write this all down?"

Mark Moran

This session is focused on practical strategies for designing and documenting internal controls; not everyone needs to spend excessive cost and effort to achieve ultimate perfection. We will start with the basics of good internal control design and types of internal controls, and discuss documenting internal controls in a practical and useful way. Tools will be provided to help you achieve value and efficiency through well designed and properly documented internal controls.

Effective Communication Skills

Lauren Florko

Good communication skills are taken for granted as a standard price-of-entry. However, most of us encounter miscommunications every single day. This session aims to discuss good electronic, written, non-verbal, and verbal communication skills. After this session, participants may expect to recognize their own personal style of communication, identify communication barriers, what is the appropriate medium of communication, and understand techniques to ensure effective feedback.