CPA CHARTERED PROFESSIONAL ACCOUNTANTS BRITISH COLUMBIA

SPRING | SUMMER 2022

Professional Development

ASCEND YOUR EXPERTISE

Spring/Summer 2022

Lifelong learning continues with your upcoming PD program

Recent events have taught us that being agile and adaptable are crucial to thriving, both personally and professionally. And lifelong learning — the concept of continuing to learn, un-learn and re-learn — will take us a long way towards achieving that required flexibility.

Your upcoming PD season brings you quality content that will not only enhance your technical skills in accounting, finance, tax, and wealth management, but also create opportunities for you to become a more well-rounded professional skilled in self-management, leadership, and negotiation. Titles in business transformation, and software and tools will also help to keep you current and efficient.

For a limited time, members will continue to receive a 20% discount towards CPABC PD in-person seminars, live webinars, PD Nexus Days, and selected on-demand products.

As public health restrictions continue to ease, we are cautiously optimistic that more in-person courses can take place later this year. For spring/summer 2022, the majority of our live seminars will continue to be offered virtually, with a planned 10% of offerings delivered in-person.

We recognize that the appetite for on-demand learning continues to grow, and by introducing new third party e-learning partners, we hope to continue providing more options and opportunities to members who prefer, or need, to complete their professional development at their own time and pace. Check our website for new partners and their products.

As you navigate through the schedule pages in this catalogue, you'll notice that we've added links at the bottom of each section – if you don't see a title you're interested in being offered, click on the links below to see whether those titles are available on-demand.

Once again, we want to acknowledge our talented pool of instructors, facilitators, and speakers who put in time and effort into presenting relevant and engaging content through both online and in-person platforms. Meet some of these instructors – see page 8.

And to our members, thank you for continuing to participate in and support your CPABC PD program.

Your CPABC Professional Development Team

Your Spring/Summer 2022 PD Program

A SIZEABLE & DIVERSE INVENTORY

235+
LIVE SEMINARS

215+
Online Virtual

20+
In-Person

385+
On-Demand Seminars

450+
Seminar Titles

QUALITY LEARNING OPPORTUNITIES

4.25/5
Average Course Rating
Mar 2021-Feb 2022

5/5
Highest Course Rating
Mar 2021-Feb 2022

FEEDBACK BASED ON
24,000
registrations

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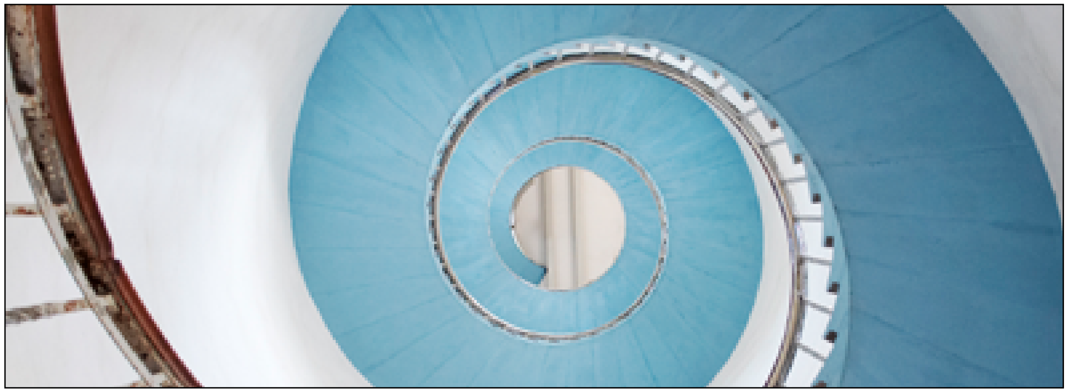

NEW Seminars for Spring/Summer 2022

ASPE - Revenue Recognition 3400

This course addresses challenges faced by preparers of ASPE financial statements and practitioners with respect to the recognition, measurement, presentation, and disclosure of revenue transactions as a result of recent revisions to ASPE 3400. An on-demand webinar of this course is also available.

Executive Programs

The following ***NEW* Executive Programs** are scheduled for fall 2022, but make sure to register by summer to book your spot.

The Optimal Negotiator

Benefit from a highly interactive learning experience and confront questions about negotiating you've never thought about before.

September 2022 | Online Virtual

Leading with Emotional Intelligence

Discover how you can achieve a more people-focused approach to your leadership style, to instill trust in your team by building meaningful relationships.

October 2022 | Online Virtual

» **READ MORE** See page 65 for how you can save money by purchasing a PD Passport

NEW On-Demand Partners

Fans of on-demand learning will be happy to know that CPABC PD is working on adding new vendor partners to increase our line-up of on-demand titles.

Browse our e-learning page on the website over the upcoming weeks to learn more about these new additions.

NEW LMS Mobile App

We will be launching the mobile application version of our Learning Management System this spring.

Named MyLearn.Go, this mobile app will provide members a better and more seamless on-demand learning experience when they use mobile devices.

Summer delivery of two great virtual PD Nexus Days!

Don't miss this year's offering of **Business and Leadership Insights** (July 7). You will be able to select from three streams of content on current business, leadership and work-life integration topics that will introduce new ideas, expand your knowledge and sharpen your skills as a business leader. Come explore new ways to be your best self, both at work and beyond.

And once again, registrants of to our popular **Information Technology Insights** (July 18-19) will have the opportunity to register for a single-day option or both days. Keep up with the latest technologies in this event, which will deliver so many practical tips, interesting stories from the tech world, and important updates you don't want to miss.

» **READ MORE** About our Spring/Summer Nexus Days offerings on page 67.

COMING THIS FALL/WINTER

Leadership Certificate Program for Women

Are you wanting to move forward in your career, and feel like there are some new or improved skills that would help you advance? Research shows that women are underrepresented in senior leadership roles in Canada. This cohort-based program is designed for female CPAs in early- to mid-career, and will provide training on a variety of topics applicable to women's leadership skills, as well as opportunities to network and build relationships. Come join your peers to learn, enhance your career, and grow as a leader. This program is open to anyone interested in women's leadership development.

More details on specific courses, timelines, and program costs can be found on the CPABC PD website under "Certificate Programs".

For more information on resources for "Women in the Profession", please visit this CPABC website which provides resources for all members seeking to support the career development of women.

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Skills CPAs need in 2022

One thing that's been clear since the start of the pandemic is the importance of being agile and adaptable to change. Based on the past two years, we all know it's impossible to predict how things will evolve. But we can still do our best to develop the skills we need to prepare ourselves for whatever may come our way professionally and personally.

CPABC's director of professional development, Nicola McLaren, CPA, CA, and manager of employer relations, Stéphanie Roy, recently shared their thoughts on what key skills they recommend people develop in 2022, in order to thrive in the workplace.

As many organizations prepare to launch hybrid working cultures, employees may feel anxious about communicating and interacting in person again, especially in this new environment. What are some of your recommendations?

Nicola: Brushing up on your communications skills, as well as improving your listening skills and becoming more empathetic, will be crucial as we head back to the office and start working more closely with our co-workers and interacting more with clients. As many organizations are embracing a hybrid working environment, it will remain important for all of us to continue to develop leadership, coaching, and management skills that accommodate both the virtual and in-person worlds of work.

» Upcoming courses on communicating, leadership, and personal development.

When we return to the office, in-person networking events will start to happen again as well. What are some ways to strengthen your networking skills to prepare for this?

Stéphanie: As Nicola just mentioned, having empathy and fostering an honest and vulnerable connection with people is important. And that applies to your relationships with contacts both inside and outside the office. As many of us have been working remotely for the past two years, the need for networking and building true connections has never been more important.

Nicola, you advocate for the lifelong learning model. Can you explain what this means to you and why it's so relevant to professionals, especially CPAs?

Nicola: As CPAs, we have skills in a variety of areas that need to stay sharp, and of course that includes technical skills. For example, tax rules are ever changing and there are new Handbook standards to learn and apply. But to help ensure members are staying well-rounded, I also encourage expanding your enabling competencies: the soft skills, the people skills, the personal development skills, etc.

Lifelong learning requires us to adopt a learn, unlearn, relearn approach.

» Upcoming courses on accounting, tax, and soft-skills.

How important is it to prioritize digital transformation in the workplace?

Nicola: The reality today is that every organization is a digital organization. So, we all need to embrace digital transformation, and it's not just about using digital tools to help you with something you're already doing; it's about using these new tools to help you do things more efficiently.

We understand that our members are on different points of the technology knowledge scale. But wherever you are, the way to stay relevant and not see technology as a threat is maximizing your human skills. As I've heard pointed out, you can never automate the trusted advisor role.

» Upcoming courses on business transformation & emerging issues, and software & tools.

Along with tech adoption, cybersecurity is also a key topic in the workplace right now. CFOs and other CPAs are now being looked to for cybersecurity advice within their organizations. How can CPAs prepare themselves to play a role in protecting their organization?

Nicola: Statistics show that there has been a significant increase in cybercrime since the start of COVID-19, and as a result, the vigilance we all need to have on a personal and business level is huge. Cybersecurity fits really nicely into the CPA skillset. We are trained in risk assessment, risk identification, and risk mitigation, and also finding the appropriate resources we need to find out what we don't know.

That being said, we all have a role to play in cybersecurity, and awareness is key. CPABC provides some phenomenal cybersecurity resources that are free, including articles and podcasts.

» Upcoming courses and resources on cybersecurity.

What's the most important skill for CPAs to work on in 2022?

Nicola: For me, it's not one specific skill but rather the concept of lifelong learning: the importance of the learn, unlearn, and relearn model. I catch myself all the time on the need to challenge something that I think is true. And yet it's not true anymore, or it's not the best way anymore. We have to unlearn things and then create some fertile ground to plant new ideas and learn new skills. On both a professional and personal level, lifelong learning is the way we're going to continue to navigate whatever is thrown at us in 2022 and beyond – to not just survive, but to thrive.

Stéphanie: The same thing goes for me, as employers are going to need people who are nimble and able to adapt and learn new skills. So be open minded. When you see an opportunity to learn a new skill or to take on a project that might require you to stretch, remember that it's a great way to build your muscles for learning new things. I think the world is changing at a rapid pace and the ability to be curious, to learn new skills, and to stay on top of trends is going to be ever important.

Read the full article by Vivian Tse, communications manager for CPABC, or listen to the podcast episode.

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Meet some of *your* great instructors!

MIA MAKI, BA, MBA, FCPA, FCMA, is a principal of a consulting firm and a professor with the University of Victoria Gustavson School of Business, with over 25 years of teaching experience. She has worked in finance and accounting since 1986 and has experience in a wide variety of industries.

Read the article Doughnut Economics and the push for regenerative, distributive systems by Mia and Douglas Stuart, or listen to Mia's podcast.

Mia will be facilitating a number of courses and programs this summer and fall.

SCOTT ORTH is a mindfulness coach and trainer, who gives CPAs the tools they need to delete the overwhelm, focus on what matters most and drive their future. Scott was previously the National Leader of HR for one of Canada's largest employee-owned engineering and science consulting organizations (Golder) and thoroughly enjoys the challenges of working with analytical, critical thinkers.

Read Scott's article Tools to thrive in a world of change, and watch his YouTube interview on What is mindfulness?

Hear from Scott directly at our upcoming seminar The Focused CPA.

PAM PENNER has extensive experience working in the field of conflict resolution as a mediator, facilitator, coach and trainer. In private practice since 1998, and as a member of the instructional team at the Justice Institute of B.C., she specializes in helping individuals develop their communication and conflict resolution skills.

Read Pam's article Smart strategies for communicating with difficult people.

Pam will be instructing Communicating Effectively Under Pressure and Tools for Communicating with Difficult People in July.

DR. VIJAY JOG is Chancellor Professor Emeritus at Carleton University and the Founder of Corporate Renaissance Group. He has led CRGroup's growth in areas of strategy design and execution, corporate performance and dashboards, strategic finance, FP&A and analytics and has consulted around the world helping clients bridge the gap between performance, technology, strategy, and finance and incentive systems.

Read Vijay's article Becoming the modern CFO.

Vijay will be facilitating The CFO as Navigator Program later this year.

Meet some of *your* great instructors! (continued)

KEN PULS, FCPA, FCMA, is a world respected speaker, trainer, author, blogger and community leader when it comes to self-service business intelligence using Microsoft tools. With over 20 years of corporate accounting and IT experience behind him, Ken founded Excelguru Consulting Inc and Skillwave.Training whose goals are to help users get the most out of Microsoft Excel and Power BI.

Attend Ken's courses on Power Query, PowerPivot, Power BI, and Dashboards this summer.

AFTAB ERFAN, PhD is a long-standing scholar-practitioner in the field of inclusion and social justice, currently serving as the City of Vancouver first Chief Equity Officer.

Read Aftab's article Microaggressions: What are they and how can you respond?

Listen to Aftab's recorded presentation in the Archived Webinar - PD Nexus: Business & Innovation Insights (Dec 2021)

HUGH WOOLLEY, CPA, CA, of Lewis & Company, specializes in income tax focusing on the reorganization of private Canadian companies. A former Revenue Canada Rulings officer, Hugh has authored several articles and is a frequent lecturer on income tax matters.

Hugh will be instructing Income Tax – Real Estate and Income Tax – Principal Residences in July.

CARRIE GALLANT, a dynamic speaker, facilitator and pay equity advocate, brings her experience as an executive, former practicing lawyer and adjunct law professor to her work in helping clients master the art and science of negotiation and influence, conflict resolution and Conversational Intelligence®. She is founder of The Gallant Leader™ Institute and the EARN Your Worth™ Leaders Lab.

Read Carrie's article Zooming your negotiations.

Carrie will be presenting at this summer's PD Nexus: Business & Leadership Insights.

Seminar **Formats**

In-person: Seminars of varying lengths delivered through the traditional in-classroom format offered by CPABC.

Live Online Virtual: Seminars that are offered live online via a virtual delivery platform such as Zoom.

On-demand: Sessions that are pre-recorded that allow individuals to attend a session at a time that works for them. In general, on-demand products do not have the ability to allow for Q&A with the subject matter expert.

CPABC Nexus Days

Nexus Days: One- to two-day conference-styled seminars. Examples of conference themes include: Work-Life Balance; Information Technology; Estate Planning; Business & Leadership, Business & Innovation; and Public Practice. These conferences usually include two plenary sessions and two to three concurrent break-out sessions.

CPABC Executive Programs

Executive Programs: In-depth (and often in-residence) or virtual executive programs geared towards providing deeper, concentrated learning in areas that fall under the responsibility of individuals holding senior accounting, finance and senior management roles.

Seminar **Levels**

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

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

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

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

ACCOUNTING & ASSURANCE

AUDIT & ASSURANCE

Assurance - Compliance with Agreements, Statutes, and Regulations This seminar covers the CPA Canada Handbook requirements for engagements to audit or review compliance of financial or non-financial information with agreements, statutes, laws or regulations. Common reports include reports on compliance. Participants will gain a comprehensive overview of compliance standards CSAE 3530 and 3531 including performance and reporting requirements with illustrative examples.	*Available Online On-demand Only*	3.5 hours	On-demand
Audit Engagements - Auditing Accounting Estimates and Related Disclosures (CAS 540) Revised Standard This course will provide an overview of Revised CAS 540 Auditing Accounting Estimates and Related Disclosures. Required risk assessment procedures, guidance on the three possible testing approaches in performing further audit procedures on accounting estimates, assessing inherent and control risk, performing stand-back procedures, incorporating professional skepticism, and meeting documentation will all be addressed. Participants will be able to identify the auditor's responsibilities and apply the standards when designing and performing procedures for audit engagements.	Jun-14 *Available Online On-demand*	8:30am-11am	Live Webinar
Audit Engagements - Overview of CAS 315 Revised Standard This seminar will review key changes and introduce the extensive application material in the revised CAS 315, Identifying and Assessing the Risks of Material Misstatement standard which is effective for audits of financial statements for periods beginning on or after December 15, 2021. Participants will build on their experience of planning an audit and be able to identify and develop an approach for the implementation of CAS 315 in their practice.	Jun-06 *Available Online On-demand*	8:30am-12:30pm	Live Webinar

Audit Engagements - Review of the Standards This seminar provides a foundation in the practical application of the Canadian Auditing Standards (CAS) to audit engagements. Using a case study approach, the course reviews key CAS 540 – Accounting Estimates and Related Disclosures and examines areas identified as common pitfalls by CPA national practice inspection findings.	Two segments Jun-20 & Jun-21 *Available Online On-demand*	9am-5pm	Live Webinar
Compilation Engagements - Application of the New CSRS 4200 This course will update practitioners on the new standard for compilation engagements (CSRS 4200) so that they will have a working knowledge of the standard for application in their practices. This seminar will include hands-on opportunities to review application of the standard in different scenarios and comparison to the previous standard to other non-assurance standards.	May-27 Jun-20 Jul-18 *Available Online On-demand*	8:30am-5pm 9am-5pm 8:30am-5pm	Live Webinar **In-person, Vancouver** Live Webinar
Compilation Engagements - Overview of the New Standard (CSRS 4200) The new compilation engagement standard, Canadian Standard for Related Services (CSRS) 4200, has some significant differences from the previous standard. This seminar will provide a detailed overview of this new standard and its impact on the planning, implementation, and documentation of a compilation engagement.	May-30 *Available Online On-demand*	8:30am-12:30pm	Live Webinar
Other Engagements - Agreed Upon Procedures (CSRS 4400) New Standard This course provides participants with an overview of the requirements of the new Canadian Standard for Related Services (CSRS) 4400 and its impact on the planning, implementation, and documentation of an Agreed-Upon Procedures engagement. Participants will be able to identify what is covered in the standard such as the use of professional judgment in an agreed-upon procedures engagement, using the work of a practitioner's expert and undertaking an agreed-upon procedures engagement together with another engagement.	*Available Online On-demand Only*	2 hours	On-demand

We encourage you to check our website for the most up-to-date schedule as offerings can be added, changed or cancelled

ACCOUNTING & ASSURANCE
- **Audit & Assurance**
- Financial Reporting
- Management Accounting

ETHICS

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- Communication & Negotiation
- Self Management & Wellness
- Teamwork & Leadership
- Resilient Leadership Certificate Program

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- Strategic & Advanced Strategic Management Certificate Programs

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- Trusts & Estates
- US & International Taxation

TECHNOLOGY & INNOVATION
- Business Transformation & Emerging Issues
- Software & Tools

WEALTH MANAGEMENT

PD NEXUS DAYS

Quality Control - Review of CSQC 1 (Current Standard) This seminar is designed to assist sole practitioners and small firms in understanding the requirements of the quality control standards as set out in Canadian Standards of Quality Control (CSQC 1) and how the requirements may be applied in a small firm environment. The seminar is structured based on the CPA Canada Quality Assurance Manual subscription, however the topics and ideas may be integrated into any customized firm template.	*Available Online On-demand Only*	3.5 hours	On-demand
Quality Management - Impacts of CSQM 1 and 2 for Providers of Assurance Services (New Standards) This seminar will help assurance practitioners understand the International Standards on Quality Management (ISQM) 1 and 2, which are proposed to replace CSQC 1. ISQM 1 provides a new approach to quality management at the firm level, including guidance on a risk assessment process and ISQM 2 provides guidance on engagement quality reviews. Participants' understanding of the new approach will allow them to identify and address risks to their practice and get a head start on compliance.	*Available Online On-demand Only*	1 hour	On-demand
Quality Management - Impacts of CSQM 1 and 2 for Providers of Compilation and Other Non-Assurance Services (New Standards) This seminar will provide non-assurance practitioners who perform compilations with an understanding of the International Standards on Quality Management (ISQM) 1 and 2 which are proposed to replace CSQC 1. The standard sets out what is needed in a firm's quality control systems to achieve quality objectives and manage risk and provides guidance on engagement quality reviews.	*Available Online On-demand Only*	1 hour	On-demand

Quality Management - Overview of CSQM 1 and 2 for Providers of Assurance Services (New Standards) This course reviews the requirements of the new Canadian Standard for Quality Management (CSQM 1 and CSQM 2), related amendments to Canadian Auditing Standards (CAS 220), and impact on the quality control processes for assurance practitioners. The course provides a map of the decisions that will need to be made and the changes, if any, required to ensure current quality control processes and procedures are compliant with the new standards.	May-24 May-26 Jul-27 *Available Online On-demand*	9am-12:30pm 1:30pm-5pm 9am-12:30pm	Live Webinar Live Webinar Live Webinar
Review Engagements - Application of the Standard Using a case study approach, this course allows those already familiar with CSRE 2400 – Review Engagements to deepen their knowledge of the standard and its application. Participants will learn to optimize the planning of the engagement, develop strategies for key steps, and identify issues related to the implementation of the requirements.	Jun-24 *Available Online On-demand*	9am-5pm	**In-person, Vancouver**
Review Engagements - Specific Topics This course builds upon fundamental knowledge of the CSRE 2400 – Review Engagements Standards and addresses areas that commonly prove more challenging for practitioners. Participants will gain a deeper understanding of how to quickly identify incomplete review engagement documentation and apply the necessary changes to resolve outstanding issues.	Jun-06 *Available Online On-demand*	9am-5pm	Live Webinar

» **DIDN'T FIND A SEMINAR?** Other Audit & Assurance titles may be available on-demand.

FINANCIAL REPORTING

ASNFPO - Disclosure and Presentation This seminar will serve as a review and refresher of the disclosure and presentation requirements of Accounting Standards for Not-for-Profit Organizations (ASNFPO) as well as the most common Accounting Standards for Private Enterprises (ASPE) standard applicable to not-for-profit organizations. Participants will learn the options available when setting accounting policies and the impacts on disclosure.	Jun-06 *Available Online On-demand*	9am-5pm	Live Webinar
ASNFPO - Review of the Standards This seminar will discuss the application of NFPO accounting standards, with an emphasis on areas where choice exists in Part III – Accounting Standards for Not-for-Profit Organizations (ASNFPO) and relevant sections of Part II – Accounting Standards for Private Enterprises (ASPE). Participants will learn what options are available when selecting policies and their impacts on disclosure, and how to determine the appropriate accounting treatment given different facts and scenarios.	Jun-27 *Available Online On-demand*	9am-5pm	Live Webinar
ASPE – Construction Industry This seminar examines the major differences between Part II - Accounting Standards for Private Enterprises (ASPE) and Part I - International Financial Reporting Standards (IFRS). It will highlight major similarities and significant differences between the two sets of standards.	Jun-13 *Available Online On-demand*	9am-12:30pm	Live Webinar
ASPE – Disclosure and Presentation This seminar reviews the realities and best practices for disclosure and presentation requirements of Part II – Accounting Standards for Private Enterprises (ASPE). Each disclosure and presentation requirement of ASPE will be reviewed and examples will be provided.	Two segments Jun-16 & Jun-17 *Available Online On-demand*	8:30am-12:30pm	Live Webinar

ASPE – Real Estate Industry Under Accounting Standards for Private Enterprises (ASPE), real estate entities encounter unique financial reporting issues. This practical seminar will use realistic exercises and examples to illustrate these issues for professionals working in the industry, including both developers and investors.	Two segments Jun-02 & Jun-03 *Available Online On-demand*	8:30am-12:30pm	Live Webinar
NEW **ASPE – Revenue Recognition 3400** This course addresses challenges faced by preparers of ASPE financial statements and practitioners with respect to the recognition, measurement, presentation and disclosure of revenue transactions as a result of recent revisions to ASPE 3400. This course offers a comprehensive review of the principles of revenue recognition under ASPE with illustrations and examples on common revenue arrangements including sale of goods vs. services in a variety of industries.	May 25 Jun-28 *Available Online On-demand (early July)*	8:30am-5pm 8:30am-5pm	Live Webinar Live Webinar
ASPE – Review of the Standards This two-day seminar reviews the standards in commonly used sections of Part II – Accounting Standards for Private Enterprises (ASPE), and discusses other aspects of the standard. In addition, this seminar identifies and outlines the accounting policy choices available to management for applying ASPE.	Two segments Jul-11 & Jul-12 *Available Online On-demand*	8:30am-5pm	Live Webinar
ASPE - Stock-Based Compensation 3870 This seminar focuses on the areas of financial reporting of stock-based compensation that are widely experienced in private enterprises. The seminar starts with a discussion on how to determine and account for stock-based compensation based on illustrative examples and a comprehensive exercise. Participants will better understand the requirements of the ASPE standards through discussion, exercises that introduce complexities, and a comprehensive exercise to illustrate the concepts discussed.	*Available Online On-demand Only*	2 hours	On-demand

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WEALTH MANAGEMENT

PD NEXUS DAYS

ASPE – Strategic Investments This course examines choices regarding accounting for strategic investments, including subsidiaries, and significantly influenced investees or investments in joint arrangements relating to ASPE 1591, 3051, and 3856. The examination will include the impact on recognition, measurement, presentation, and disclosure of the choices. Participants will learn to evaluate the nature of strategic investments and apply the correct accounting method, including when to choose to account for controlled subsidiaries or significantly influenced investees at cost.	*Available Online On-demand Only*	7 hours	On-demand
IFRS – Review of the Standards This seminar focuses on general CPA Canada Handbook Public Sector Accounting Standards (PSAS) concepts, the structure of the PSAS Handbook, and differences between PSAS and those of ASPE or IFRS.	Four segments Jun-13, Jun-14, Jun-15 & Jun-16 *Available Online On-demand*	9am-12:30pm	Live Webinar
IFRS 9 – Financial Instruments This course is designed to teach participants the main provisions of the Part I – International Financial Reporting Standards (IFRS) 9, Financial Instruments and provide them with the necessary knowledge to apply it to their own financial instrument fact situation.	Two segments Jul-20 & Jul-21 *Available Online On-demand*	8:30am-12:30pm	Live Webinar
IFRS 15 – Revenue Recognition Accurate revenue recognition reporting is necessary for internal and external reporting for all revenue producing companies to maintain investor and creditor confidence. The objective of this seminar is to provide participants with a practical understanding of the five-step revenue recognition framework under Part I – International Financial Reporting Standards (IFRS) 15, Revenue from Contracts with Customers, and how to apply it.	Two segments Aug-03 & Aug-04 *Available Online On-demand*	8:30am-12:30pm	Live Webinar

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IFRS 16 – Leases IFRS 16 – Leases is now in effect and has significant impact for all companies with leases, particularly operating leases. This seminar provides an in-depth review of the new standard, including the objective and scope of the standard, defined terms, exemptions, and transitional requirements.	Two segments Jun-21 & Jun-22 *Available Online On-demand*	9am-12:30pm	Live Webinar

» **DIDN'T FIND A SEMINAR?** Other Financial Reporting titles may be available on-demand.

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WEALTH MANAGEMENT

PD NEXUS DAYS

MANAGEMENT ACCOUNTING

Accelerate and Optimize Financial Close and Spreadsheet Controls Gain a practical understanding of best practices in the financial close processes and learn how to accelerate the financial close process and controls. You will focus on spreadsheet controls, which make the whole process of using spreadsheets more effective and efficient. You will also learn how to redesign and enhance spreadsheets to reduce the likelihood of error and facilitate the use of spreadsheets as analytical tools.	Two segments May-26 & May 27	9am-12:30pm	Live Webinar
Advanced Financial Statement Analysis Enhance your analyzing skills for financial statements with this full-day course. Discover essential techniques to compare International Financial Reporting Standards (IFRS) and Accounting Standards for Private Enterprises (ASPE) reporting documents and highlight measures that must be taken into account to arrive at a detailed assessment.	Jun-28	9am-5pm	Live Webinar
Budgeting & Financial Management: Understanding Budgeting Variance Analysis & Forecasting Learn the principles of financial management and how to apply them when making decisions that may affect financial performance. Understand the context within which a budget must be managed in order to meet corporate reporting requirements, and the responsibilities of managing a budget.	Two segments Jul-15 & Jul-22	8:30am-11am	Live Webinar
Building Enterprise Performance Dashboards The multi-dimensional view of enterprises with both leading and lagging key performance indices (KPIs) has led many leading organizations to design holistic performance measurement and management frameworks to run their business. These frameworks are often referred to as “balanced scorecards.” Through real examples and hands-on work, you will understand how these scorecards can improve performance and help your company exceed expectations.	Aug-10	9am-5pm	Live Webinar

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Controllership - Operational Management In order to add value to their organizations, controllers serve distinct roles and this seminar focuses on two: steward and operator. In the operator role, the controller plays a part in human resource management as well as performs their steward role through financial performance and performance measurement, information/risk management, and relationship management skills. Participants will gain insights, skills, practical tips, and a broader view of the controller's role to add value to their organization.	Jun-10 Jul-27 *Available Online On-demand*	9am-5pm 9am-5pm	Live Webinar **In-person, Vancouver**
Controllership – Strategic Leadership This seminar clarifies the controllers' responsibilities and provides an in-depth examination of the catalyst and strategist roles. It also provides strategies for working with people of all ages and explores the importance of emotional intelligence. Participants will be able to identify ways to add value as strategic leaders in their organization and will receive practical tips on how to enhance their leadership skills.	Jun-14 Jul-28 *Available Online On-demand*	9am-5pm 9am-5pm	Live Webinar **In-person, Vancouver**
Costing and Profitability Learn how to contribute directly to your organization's bottom line by analyzing profitability by product, customer, segment, or geographical region. You will also learn how to identify the main drivers of profitability and the parts of the business that need to be changed.	Jun-27	9am-5pm	Live Webinar
Creating Value Through Budgeting Discover how to better integrate budgets using the strategic plan of the organization. Discuss the traditional budget framework and concepts beyond budgeting that can be integrated as a way to create budgets that are more flexible and realistic.	Jun-13	8:30am-10am	Live Webinar

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Effective Financial Analysis for Business Decisions – Medium Privately-Held Businesses This seminar introduces a decision-making format for the use of financial information and a road map for providing consistent, well-articulated analysis and recommendations. Insights into strategic decisions, financial planning and forecasting, implications for investment and financial decisions, firm valuations, mergers and acquisitions, and the potential impact of some key variables and events on the financial health of the company are explored.	Aug-11	9am-5pm	Live Webinar
Essential Topics for Controllers Explore essential areas that you will be expected to be proficient at, or at least have knowledge of, as your career as a controller progresses. Career-enhancing topics such strategic planning, human resources, negotiating, management vs. leadership, and communication will be de-mystified.	Two segments Jun-23 & Jun-24	9am-12:30pm	Live Webinar
Financial Management in the Construction Industry Attain greater knowledge in business systems and financial awareness in the construction industry, from the necessary complexity of the project accounting system, to the broad and integrated spectrum of stakeholders. Explore and be able to confidently address a wide range of topics in these areas.	Two segments Jun-15 & Jun-16	9am-12:30pm	Live Webinar
Implementation of Internal Controls in the Small-to-Mid-Sized Enterprise Context Leadership and expectations of the finance function are evolving rapidly, resulting in diverse definitions of good governance, management responsibility, and appropriate internal controls. This hands-on seminar gives new and experienced financial leaders an opportunity to explore and discuss implementation of internal controls in the SME context, using the COSO Enterprise Risk Management Methodology.	Jun-23 *Available Online On-demand*	9am-5pm	Live Webinar

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Internal Controls - Industry Sector This seminar provides an overview of the main concepts of internal controls and the associated components, focusing on the COSO framework. Common internal control deficiencies related to financial reporting in a small-to-medium-sized company are presented and potential solutions examined using discussion and exercises. Participants will explore key controls in the financial statement reporting process to address risk, the effect of technology on internal controls, and how to monitors the internal controls.	Jun-07 *Available Online On-demand*	9am-5pm	Live Webinar
Interpreting Financial Statements Strengthen your financial statement analysis capabilities through a hands-on review and interpretation of case studies as well as discussions. Be able to quickly and confidently identify what is happening through the interpretation of financial results, a critical skill in your toolbox.	Two segments Jul-25 & Jul-26	9am-12:30pm	Live Webinar
Powerful Financial Analysis Acquire key skills that financial analysts need to perform their role effectively within an accounting department. Obtain tools that will assist analysts in furthering their careers, including the abilities to providing meaningful information and influence those around them.	Jun-10	9am-5pm	Live Webinar
Practical Tips for Controllers & CFOs Discover a wide range of useful tips that you can employ at work – tips that are not normally found in seminars or textbooks, illustrated with interesting anecdotes and examples.	May-31 Jul-27	9am-5pm 9am-5pm	Live Webinar Live Webinar

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Practical Tips for Controllers & CFOs – The Case Course This realistic seminar is a companion to Practical Tips for Controllers & CFOs, and can be taken as either a standalone, or before or after that seminar. This practical session will work through a number of in-depth, realistic cases. It will enhance your practical knowledge and provide many useful tips for everyday responsibilities.	Jun-21	9am-5pm	Live Webinar
Practical Tips for Not-for-Profit Financial Leaders Discover useful tips for accountants who work for not-for-profit organizations. The tips are illustrated through concrete examples derived from real experience. An in-depth, financial reporting improvement case will be used.	Jun-02	9am-5pm	Live Webinar
Taking Financial Statement & Ratio Analysis to the Next Level Explore analyzing financial statements using a few different methods, focusing on ratio analysis and comparisons to industry standards sourced from various software tools, such as Bloomberg. Identify what to look for on financial statements, and discuss other indicators of health for an organization.	Aug-11	9am-5pm	Live Webinar

» **DIDN'T FIND A SEMINAR?** Other Management Accounting titles may be available on-demand.

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A Threats and Safeguards Approach to Ethical Decision Making Explore situations in your professional roles that involve ethical challenges and examine how these can pose threats to compliance with the Fundamental Principles. Determine how these threats can be mitigated, through examining the CPA Code and relevant safeguards.	May-19 Jun-18 Jun-20	8:30am-12:30pm 8:30am-12:30pm 8:30am-12:30pm	Live Webinar Live Webinar **In-person, Vancouver**
Becoming an Ethical Leader Explore the critical role that ethical leadership contributes to organizations with interactive group discussions that are based on real-life challenges leaders may face.	May-06 Jun-10 Aug-17	8am-12pm 8am-12pm 8am-12pm	Live Webinar Live Webinar Live Webinar
Business Ethics: It Starts with You Understand and manage ethical issues in your everyday business setting. Explore how both personal and business values influence business decisions through dynamic group discussions.	Jun-07 Jun-30 Jul-14 Jul-20 Aug-04	8:30am-12:30pm 8:30am-12:30pm 8:30am-12:30pm 8:30am-12:30pm 8:30am-12:30pm	Live Webinar Live Webinar **In-person, Vancouver** Live Webinar Live Webinar
Ethical Decision Making: Exploring the Hidden Influence of Unconscious Bias in the Conscious Mind How can we better understand the hidden biases that underlie our decisions, shape our perspectives, and influence our personal interactions? In this session we will consider the drivers of unconscious bias and the impact on organizational decision making. We will explore how best to identify and mitigate the risks of unconscious bias in the workplace, to build more innovative, inclusive, and ultimately successful organizations.	May-30 Jul-14	8:30am-12:30pm 8:30am-12:30pm	**In-person, Vancouver** Live Webinar

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Ethical Leadership in an Age of AI Advancements in artificial intelligence (AI) raise unique ethical challenges for business leaders. Participants will collaborate to evaluate a variety of ethical situations and explore the implications of AI technologies on the role of an ethical leader in the context of the CPA Code. » **READ** instructor Laura Friedrich's article on CPAs and AI.	Jul-07 Aug-16	8:30am-12:30pm 8:30am-12:30pm	Live Webinar Live Webinar
Ethical Tax Tax is seldom black or white. In this interactive session, case studies will be used to provoke discussion on ethical dilemmas related to tax matters confronting accountants. Learn how to recognize and handle a variety of ethical tax scenarios, and foster and promote ethical behaviour in the profession.	Aug-04	8am-10am	Live Webinar
Ethics at Our Core Refresh your knowledge of the CPA Code of Professional Conduct and apply the Code to resolve several interactive case studies and realistic situations. This seminar helps participants to develop skills for dealing with ethical dilemmas and using appropriate decision making in their workplaces.	Jun-28 Jul-06	8:30am-12:30pm 8:30am-12:30pm	Live Webinar Live Webinar
Professional Ethics for Career and Life Success Receive guidance through several classic ethical frameworks, and practical tools to maintain high standards of ethics in your work and on your team. Learn how you can ensure you are working ethically even when you are charting new territory, especially amidst constant change.	Jun-24 Jul-20	8:30am-12:30pm 8:30am-12:30pm	Live Webinar Live Webinar
Shades of Grey: Ethics in the Workplace Enhance your understanding of professional ethics through group case studies on everyday dilemmas and explore moral philosophy in the workplace.	May-06 Jun-10 Aug-17	1pm-5pm 1pm-5pm 1pm-5pm	Live Webinar Live Webinar Live Webinar

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Understanding and Embracing Ethics in the Workplace Learn effective techniques for ethical thinking and how to apply these tools to relevant business-based scenarios.	May-24 Jun-22	8:30am-12:30pm 8:30am-12:30pm	Live Webinar Live Webinar

» **DIDN'T FIND A SEMINAR?** Other Ethics titles may be available on-demand.

FINANCE & ECONOMICS

BUSINESS VALUATION

Business Valuations - Advanced Building on the concepts taught in Business Valuations - Fundamentals, this seminar gives participants more detailed insight into some complex issues associated with business valuations using a detailed case study. This seminar dissects the basic approaches so that practitioners can recognize the limitations of various valuation approaches, and provides information that will allow professionals to conduct supplementary analysis for a more robust conclusion of value.	Jul-11 *Available Online On-demand*	9am-5pm	Live Webinar
Business Valuations - Fundamentals Accountants often need basic business valuation knowledge and skills to assist their clients or employers. This seminar provides participants with practical insight into business valuation. Participants will gain insight on how to apply various valuation tools and the valuation process under an asset approach, income approach, and market approach.	May-27 Jun-15 *Available Online On-demand*	9am-5pm 9am-5pm	**In-person, Vancouver** Live Webinar
Business Valuations – Purchase Price Allocation This seminar presents practical strategies for approaching a purchase price allocation (PPA) for financial reporting purposes following a business acquisition or combination. The seminar provides a summary of valuation techniques used for specific, identifiable intangible assets and provides a step-by-step review of sample calculations for valuing different types of intangible assets resulting from a business purchase.	Jul-22 *Available Online On-demand*	9am-5pm	Live Webinar

» **DIDN'T FIND A SEMINAR?** Other Business Valuation titles may be available on-demand.

CORPORATE FINANCE

Corporate Treasury Management Treasury is a key finance function that ensures businesses have the money they need to manage their day-to-day business obligations, while also helping develop their long-term financial strategies and policies. In this seminar for treasury professionals and financial managers, participants will work through detailed calculations, case studies, and examples to gain an understanding of the treasury function and how to apply its fundamental principles within the finance department of their organizations.	Jun-16	9am-5pm	Live Webinar
Due Diligence for Acquisitions The due diligence process has multiple objectives: deciding whether to proceed, providing a basis for pricing the transaction, and preparing for life after the deal is consummated. In this seminar, participants will deepen their understanding of factors to consider, plan for, and watch for in M&A transactions.	Jun-23 *Available Online On-demand*	9am-5pm	Live Webinar
Financing Strategies Many businesses require some type of financing and this seminar provides an in-depth review of the various forms of financing to fund capital projects or acquisitions and to reorganize existing capital structures. Participants will gain a deeper understanding of what capital providers are seeking, issues that can arise, and how companies should prepare themselves to execute a financing transaction to seek financing and negotiate with capital providers.	Jul-08	9am-5pm	Live Webinar

Treasury & Finance for Accountants Although accountants are not specifically trained in the inner workings of hedging and financial instruments, they are often called upon for advice in these areas, particularly to hedge various risks. This course reviews the business side of finance, hedging, and treasury transactions and provides accountants with a solid understanding of some of the key financial principles to obtain a better understanding of the business aspects.	Jun-09	9am-5pm	Live Webinar

» **DIDN'T FIND A SEMINAR?** Other Corporate Finance titles may be available on-demand.

FINANCIAL MODELLING

Building a Model (of a Company) This hands-on course focuses on the skills required to design and create an interactive financial model of a company that adheres to the highest industry standards. The course material includes 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.	May-31	9am-5pm	Live Webinar
Financial Modeling in Excel In this interactive seminar, accountants and other professionals who want to learn how to use Excel to build better financial models will discover how to confidently build a suite of forecast financial statements using best modeling practices.	Two segments Jun-22 & Jun-24	12:30pm-4pm	Live Webinar

» **DIDN'T FIND A SEMINAR?** Other Financial Modelling titles may be available on-demand.

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COMMUNICATION & NEGOTIATION

Becoming a Skilled Negotiator This interactive course will 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.	Two segments Jun-21 & Jun-22	8:30am-12pm	Live Webinar
Communicating Effectively Under Pressure Explore situations where you may feel pressure, and learn practical strategies to manage these situations effectively.	Two segments Jul-04 & Jul-05	9am-12:30pm	Live Webinar
Communicating with Influence Ever been caught in the communication circle of, “That’s not what I said – that’s not what I meant”? Attend this seminar to learn new skills to clearly and effectively get your message across, and communicate with influence to support your success as a leader and manager.	Two segments Jul-13 & Jul-14	9am-12:30pm	Live Webinar
Conflict: Changing Viewpoints & Influencing Behaviors In this highly practical course, learn how to turn conflict into opportunities for problem solving and how to deal effectively with confrontation and criticism. Discover your “hot buttons” and develop self-control.	Three segments Jul-19, Jul-20 & Jul-21	10am-12:30pm	Live Webinar
Level Up: Better Online Meetings Like it or not, virtual meetings are here to stay. Learn how to make the most of online meetings so you can better connect with participants in an engaging, efficient way.	Jul-05	8:30am-12pm	Live Webinar

Level Up: Public Speaking and Presentation Skills Whether you dread speaking in front of others or simply know you can do better, this course will provide you with tangible tips and tools you can use to take your public speaking to the next level. From preparation to execution, we will explore ways you can enhance all aspects of your public speaking and presentation skills.	Jun-15	8:30am-12pm	Live Webinar
Level Up: Writing for Clarity and Impact From Slack messages to client emails and reports, written communication is everywhere. Is your message landing? In this workshop, you'll learn how to improve your writing by focusing on clarity and impact.	Jun-23	8:30am-12pm	Live Webinar
Negotiation Skills The ability to negotiate effectively both internally and externally differentiates how an individual contributes to the team. This workshop is based on the four-part model in the world-renowned book Getting to Yes: Negotiating Agreement Without Giving In by Fisher and Ury. The majority of the workshop is spent working on actual negotiations (past, current, and future) that the participants face, with a heavy emphasis on practice and coaching by peers and the facilitator.	Jun-16	9am-5pm	**In-person, Vancouver**
Tools for Communicating with Difficult People Learn how to deal with your reactions to others and self-manage your own. Discover techniques to respectfully but assertively conduct difficult conversations.	Two segments Jul-18 & Jul-19	9am-12:30pm	Live Webinar

» **READ** instructor Pam Penner's article on communicating with difficult people.

Write to be Read Learn how to improve the readability of your writing, and how to write in ways that fit with how reading patterns have changed due to technology's impact. Discover other tips and techniques for writing efficiently and effectively.	Jun-28 Jul-26	9am-12:30pm 9am-12:30pm	Live Webinar **In-person, Vancouver**

» **DIDN'T FIND A SEMINAR?** Other Communication & Negotiation titles may be available on-demand.

SELF MANAGEMENT & WELLNESS

Brain Focus: The Power of Full Engagement A full-day course packed with strategies to help your productivity and improve your focus to work smarter all day long.	Jun-17	9am-12:30pm	Live Webinar
Coach Yourself First Gain a deeper understanding of your personal coaching style and its impact on others. Discover the power of personal passion, engagement, and purpose to manage yourself and coach others to be effective coaches.	Jul-12	9am-5pm	Live Webinar
Critical Thinking and Self Reflection Designed for leaders who want to develop their critical thinking skills to enhance personal effectiveness, this seminar will diagnose your learning style, introduce critical thinking tools, and help you develop an action plan.	Jun-08 Jun-16	9am-5pm 9am-5pm	Live Webinar **In-person, Vancouver**
Leading Self and Emotional Intelligence Learn how to apply factual thinking to better deal with your emotional triggers and self-limiting beliefs. Discover practical tools that will enable you to build new habits and to relate to others in a more impactful and influential way.	Jun-01	9am-12:30pm	Live Webinar

Personal Effectiveness: Self Awareness and Balanced Thinking | Jul-28 | 9am-5pm | Live Webinar

Successful people have one thing in common – they learn by doing and by applying their experience to day-to-day activities. This one-day highly interactive course identifies the links between our self-understanding, personal growth, communication and management styles, and critical thinking, both in our working and personal lives.

Stress Management | Aug-25 | 9am-12:30pm | Live Webinar

Gain awareness of the mental chatter that informs our stress levels, evaluate your thinking during times of stress, and then build new ways to respond to stressful situations.

The Focused CPA – Finding and Maintaining Focus in the Age of Distraction | Two segments Jul-07 & Jul-14 | 9am-12:30pm | Live Webinar

One of the greatest challenges for CPAs today is maintaining a focused mind amidst a sea of distractions and competing interests. Obtain the knowledge, tools and practices to find your focus and maintain it. You can expect to gain anywhere from 30 to 90 minutes per day (or more) of productive time, or time spent on what matters most in your life.

» **READ** instructor Scott Orth's article on thriving in a world of change.

The Four Intelligences | Jul-05 | 9am-12:30pm | Live Webinar

Using Stephen Covey's Four Intelligences as a base - intellectual, emotional, physical and spiritual, this session will explore tools and strategies to effectively navigate change, and examine the challenges and opportunities in leading through change.

Time Management: The Essentials of Productivity Skills | Jul-26 | 9am-5pm | Live Webinar

Discover a new mind-set and skill-set that will optimize your personal productivity. Learn how to gain and keep control of competing priorities, concurrent projects and critical deadlines in this seminar that focuses on practicality.

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Triple Your Reading Speed — Jul-22 — 9am-5pm — Live Webinar

Learn how to quickly, easily, and dramatically improve reading speed and comprehension. In addition, discover how you can enhance your memory and improve your vocabulary, and receive motivational tips on goal-setting and advice on time management.

» **READ** instructor Terry Small's article on reading comprehension.

We Have to Talk: Having the Difficult Conversation — Jul-26 — 9am-5pm — Live Webinar

In a recent Google search, dozens of books on the topic of crucial, fierce, important conversations were found. One common theme emerges from this literature – the fear of difficult conversations is often more stressful than the actual conversation. This workshop places difficult conversations at the core of successful work relationships.

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TEAMWORK & LEADERSHIP

Achieving Results Through Collaborative Projects This course focuses on the value of intentionally designing a culture that improves interpersonal communication, and the importance of collaborative project planning as a vehicle for building teams and delivering value in organizations. Participants will engage in hands-on, interactive activities to fully experience the principles of this philosophy.	Two segments Jun-21 & Jun-22	9am-12:30pm	Live Webinar
Building and Managing Successful Business Relationships Business is to a great extent about people. The quality of your working relationships has an enormous impact on your effectiveness, productivity, job satisfaction, and long-term employability. Relationship management is also a key driver of business efficiency, effectiveness, and long-term success. This workshop will help you build better business relationships, track your progress, and generate the results you want.	Jun-14	8:30am-12pm	Live Webinar
Building High Performance Teams Every business leader knows their workers are their best opportunity for achieving a sustainable competitive advantage. Learn how to genuinely motivate, engage, excite, and keep employees.	Three segments Aug-16, Aug-17 & Aug-18	10am-12:30pm	Live Webinar
Building Your Leadership Brand Why would really talented people want to work really hard for you? Just as an organization cannot be all things to all customers, you must also discover and nurture your own unique value proposition as a leader. What are you best at? What do you stand for? And how does all of that show up in how you lead your team? This practical, hands-on workshop will help you build a leadership brand that is more valuable to your career and to everyone you work with.	Jun-22	8:30am-12pm	Live Webinar

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Coaching for Executive Excellence Learn effective coaching techniques and best practices, create great coaching relationships, and apply coaching in everyday management situations to empower your team to go beyond their own capacity.	Two segments May-30 & Jun-01	9am-12:30pm	Live Webinar
Creative Leadership: Bringing Innovation to the Workplace Explore the steps you can take to become a creative leader, how to bring greater diversity of thinking into the workplace, create a culture where people aren't afraid of failure, and become a champion for change.	Jun-29	8:30am-10am	Live Webinar
Dispelling the Myth of "Effective Meetings": Engaging Virtual Meetings Your Employees Will Want to Attend The objective of this seminar is to have participants leave the session with a specific planning framework tool designed to assist their team in building meetings that are relevant, productive, engaging and yes, even welcomed by others in their organization.	Aug-12	9am-12:30pm	Live Webinar
Effective & Essential Management Skills This fast-paced and practical learning experience will enhance your tactical managerial and coaching skills. Learn how to drive high degrees of engagement, delegate, empower, and provide meaningful feedback to your team.	Aug-09	9am-5pm	Live Webinar
Employee Delegation, Engagement, and Empowerment Delegation, done well, drives employee engagement, development, performance, and retention. Delegation is also critical to management efficiency and effectiveness: no one can do it all on their own, and poor delegation causes misunderstandings and errors, which take a lot of time to clean up. This practical, hands-on workshop will take you through several important leadership practices to help you delegate more effectively and enhance employee engagement.	Jun-29	8:30am-12pm	Live Webinar

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Empowering and Engaging Others In the current economic climate, and with the growing expectations of increasingly demanding employees, developing the competencies of leaders and managers is key to improving individual, organizational, and business performance. This highly interactive course provides leaders and managers with the tools and techniques, confidence and practice, to become highly effective managers.	Aug-03	9am-5pm	Live Webinar
High Performing Team Member Gain an of awareness about what it takes to play a constructive role as a member of a high-performing team. Special emphasis is placed on the interpersonal skills that team members need, for example advocacy, listening, and conflict resolution. The workshop is based on Patrick Lencioni's five-step framework that includes the practices of building trust, resolving conflict, developing commitment, holding team members accountable, and achieving results.	May-26	9am-12:30pm	Live Webinar
Influencing Without Authority A key skill relevant to leaders at all levels is the ability to positively influence people in such a way that others willingly alter their thoughts and plans. Learn the skills and processes required to influence others in getting things done.	Jul-12	9am-12:30pm	Live Webinar
Leadership and Coaching Equip yourself with the skills to become an effective and respected leader, able to turn compliance into commitment. Gain knowledge on strategic and inspirational leadership, shared core values, coaching for growth, and mentoring to enable others to fulfil their potential.	Jun-15 Jul-15	9am-5pm 9am-5pm	Live Webinar **In-person, Vancouver**

Leading Professional Teams - Successfully Transitioning from Professional Expert to Team Leader Transitioning from a technical accounting expert to leading a team of accounting and other professionals is one of the most significant milestones in a person's career. It can, however, be a challenging transition. Leading teams means taking on new responsibilities and requires a broad portfolio of skills and an understanding of human psychology. Explore what it takes to lead teams effectively as well as the hurdles that trip up many aspiring team leaders.	Jun-29	9am-12:30pm	Live Webinar
Managing Change and Transformation Understand and respond to the continual process of business change and transformation. Learn how you can champion change efforts and manage the process through leadership, perseverance, risk-taking, and the enrolment of others.	Jul-21	9am-5pm	Live Webinar
Managing My People Managers find it challenging to maximize their people's contribution to the success of their business. This interactive course will discuss effective ways of working with teams, in order get the best out of each team member.	Jul-05	8:30am-12pm	Live Webinar
Seven Steps to Successful Virtual Teamwork Working from home and dispersed offices create challenges to the ways we work and communicate. Learn best practices to foster successful teamwork in dispersed work locations by identifying barriers and fostering high-performing behaviours.	Jun-29	9am-5pm	Live Webinar
Wiring Your Brain for High Impact Leadership Leverage the latest theories on the brain and how thinking habits influence our actions, especially with problem solving and conflict resolution. Discover brain engagement, and learning to lead with the brain in mind.	Jul-18	9am-5pm	Live Webinar

» **DIDN'T FIND A SEMINAR?** Other Teamwork & Leadership titles may be available on-demand.

We encourage you to check our website for the most up-to-date schedule as offerings can be added, changed or cancelled

RESILIENT LEADERSHIP CERTIFICATE PROGRAM

Resilient Leadership - Balance Life, Work, and Overwhelm How do you deal with work that never ends? Learn how to set up a routine that is productive, healthy, and sustainable. Get beyond "panic working" and look at tools to help you focus, energize, and allocate your time to the things that matter most.	Jul-21 Jul-27	9am-12:30pm 9am-12:30pm	Live Webinar Live Webinar
Resilient Leadership - Energize Your Team Through Uncertainty Leading in times of uncertainty is like driving in the fog. Discover how to bring more clarity and focus to your leadership and learn a simple three-part framework to help you lead through uncertainty and strengthen your team for the long haul.	Jun-30 Jul-13	9am-12:30pm 9am-12:30pm	Live Webinar Live Webinar
Resilient Leadership - Five Qualities of a Leader Who Thrives in a Crisis How leaders show up in this moment and what you stand for will be remembered for years to come. Discover the five qualities of a leader including insights and tools to assess and strengthen your ability to not only survive, but thrive, during a crisis.	Jun-28 Jul-06	9am-12:30pm 9am-12:30pm	Live Webinar Live Webinar
Resilient Leadership - Manage Your Mindset and Emotional Well-being Have you considered how you will remain optimistic and hopeful in front of your team and family, no matter what the situation? Dig into the need for leaders to make room for all kinds of emotions. Then learn to lead with strength and compassion while supporting emotional well-being and resilient mindsets.	Jul-14 Jul-25	9am-12:30pm 9am-12:30pm	Live Webinar Live Webinar

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Resilient Leadership - Who's Listening?	Jul-07	9am-12:30pm	Live Webinar
We're not listening. And no one is listening to us. Yet listening is essential to our times. Change the way you think about communicating with your team, family, and friends, and discover a roadmap on how to listen, and why being a good listener matters so much now.	Jul-20	9am-12:30pm	Live Webinar

» **The Resilient Leadership Certificate** is taught by Tammy Robertson, listen to her on our podcast to learn how you can be a resilient leader.

PUBLIC PRACTICE MANAGEMENT

Branding & Marketing for Small Business Does your business look and sound as strong as the services you provide? In this course, we'll explore branding and marketing for small accounting firms with the goal of helping you elevate your business.	Jul-12	8:30am-12pm	Live Webinar
Digital Marketing Essentials for Accountants From email to social media marketing, search engine advertising and more, digital marketing is an important part of any accounting business. In this course, we'll explore a number of tools to help you attract business and stand out online.	Jul-19	8:30am-12pm	Live Webinar

» **DIDN'T FIND A SEMINAR?** Other Public Practice Management titles may be available on-demand.

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PD NEXUS DAYS

STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE

RISK MANAGEMENT & FRAUD

Fraud Happens - What to Do When You Suspect Fraud A rational reaction plan is critical to responding appropriately to concerns about fraud and related inappropriate conduct. This seminar will provide best practices for conducting an organized financial investigation, and will guide participants through the many challenges that companies face, including using real-life examples of fraud.	Two segments Jun-21 & Jun-22	9am-12:30pm	Live Webinar
Understanding the Financial Risk of Employee Benefits This seminar will help participants better understand the current reality related to employee benefits, recognize that a “financial storm” is coming around their costs and risks, and develop strategies that are best suited to their own unique needs.	Jun-16	1:30pm-5pm	Live Webinar

» **READ** instructor Dan Eisner’s article on the financial risks of employee benefits

» **DIDN’T FIND A SEMINAR?** Other Risk Management & Fraud titles may be available on-demand.

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STRATEGY, GOVERNANCE & HUMAN RESOURCE

Employment Law & HR Practices Gain a practical perspective on the relationship between the legal landscape for (mostly non-union) employment in Canada, and day-to-day human resources activities that impact your organization.	May-25	9am-5pm	Live Webinar
Employment Standards Overview This seminar provides an overview introduction to key provisions of the BC Employment Standards Act (ESA), with emphasis on commonly misunderstood requirements. Participants will have the opportunity to ask real-life questions and will receive a handout summarizing seminar content.	Jul-08	9am-12:30pm	Live Webinar
ERP Selection and Implementation As businesses change, the question “What systems do we need to manage our business activities?” is always raised. The term ERP strikes fear in many, as most people have heard horror stories about implementations gone wrong. This session will eliminate those fears and provide some answers on ERP systems for both small and large organizations, as well as the steps required to prepare your organization for selecting, implementing, and supporting an ERP system.	Jun-22	8:30am-12:30pm	Live Webinar
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.	Jul-15	9am-12:30pm	Live Webinar

» **DIDN’T FIND A SEMINAR?** Other Strategy, Governance & HR titles may be available on-demand.

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STRATEGIC & ADVANCED STRATEGIC MANAGEMENT CERTIFICATE PROGRAMS

Advanced Strategic Management Certificate: Links This case-based, interactive session takes participants through a process of analysis and review, allowing a big picture perspective, balanced with emphasis of key details and the importance of making hard choices throughout the process.	Aug-17	9am-5pm	**In-person, Vancouver**
Advanced Strategic Management Certificate: Maps In this session, participants will gain experience in strategy mapping and integration. Using strategy mapping, participants will be able to understand how to assess and consider limited resources in strategic planning and how to best make hard choices between strategic alternatives, priorities, and resources.	Aug-16	9am-5pm	**In-person, Vancouver**
Strategic Management Certificate: Change Management Learn how organizational and human dynamics impact change initiatives, how to plan for change, and examine the main ingredients necessary for successful implementation.	Jun-27 Aug-10	9am-5pm 9am-5pm	Live Webinar Live Webinar
Strategic Management Certificate: Risk Management & Governance Examine different types of risks which can undermine the achievement of an organization's objectives, and the management approaches and tools used to manage these risks.	Jun-24 Aug-12	9am-5pm 9am-5pm	Live Webinar Live Webinar
Strategic Management Certificate: Strategic Planning Examine the link between stated organizational goals, the business environment, and visible strategies, with a focus on the functional strategy level. Gain an appreciation of the tools used to develop and execute successful strategies.	Jun-17 Aug-03	9am-5pm 9am-5pm	Live Webinar Live Webinar

Strategic Management Certificate: Team Development Gain an in-depth understanding of factors impacting team effectiveness, including team design, stages of team development, and ingredients necessary for achieving results.	Jun-08 Jul-22	9am-5pm 9am-5pm	Live Webinar Live Webinar

» **The Strategic and Advanced Strategic Management Certificate Programs** are led by Mia Maki and Rieghardt Van Enter. Read Mia's article on Doughnut Economics and the push for regenerative, distributive systems.

TAXATION

CORPORATE & PERSONAL TAX

Corporate Restructuring – Application for Private Corporations Practitioners involved with reorganizing private corporations need to consider a wide range of technical rules, develop a plan that meets the client's objectives, navigate the practical challenges of implementing the plan, and communicate the plan to other professionals. Using mini-cases, this seminar provides a practical approach and guidance on identifying, planning, documenting, and implementing reorganizations of private corporate groups.	Jul-04 *Available Online On-demand*	9am-12:30pm	Live Webinar
Corporate Restructuring - Fundamentals This seminar highlights fundamental income tax considerations that arise in corporate reorganizations, including a discussion of related provisions and key pitfalls. Participants gain a summary of the tools available to effect transfers or mergers in a tax-efficient manner, and considerations of traps and anti-avoidance rules when entering into such transactions. Examples are used to highlight strategies and issues associated with the process of initiating a corporate reorganization.	Aug-02 *Available Online On-demand*	9am-5pm	Live Webinar
Corporate Restructuring - Section 85: Transfer of Property This seminar covers selected tax aspects explaining the transfer of property to a corporation using the Section 85 rollover rules. Each module contains specific examples and cases designed to help participants review relevant tax theory and focus on major tax planning issues, including filing requirements and ensuring the transaction is not caught by key anti-avoidance provisions.	Aug-10 *Available Online On-demand*	9am-5pm	Live Webinar

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PD NEXUS DAYS

Corporate Tax - Investment Holding Companies The taxation of investment holding corporations has seen a number of significant changes over the past few years. This course will review these and other changes using a number of examples, as well as examine the issue that is now faced by many clients – should I keep or wind up my investment corporation?	Jun-28 Jul-19 *Available Online On-demand*	9am-12:30pm 9am-12:30pm	**In-person, Vancouver** Live Webinar
Corporate Tax - Purchase and Sale of a Business This seminar will provide an understanding and update of Canadian income tax issues for purchasers and vendors of businesses in Canada and their professional tax advisors. The focus on this course will be on transactions between Canadian private business owners and/or their privately held corporations.	Jul-13	9am-5pm	Live Webinar
Corporate Tax - RDTOH, CDA and Other Tax Accounts This seminar provides a detailed review of the key tax accounts for private corporations and examines tax planning processes in the case of multiple tax accounts, including GROP, LRIP, CDA, and the three RDTOH pools. The focus of this seminar is applying an understanding of these pools to effective tax planning.	Jul-08	9am-12:30pm	Live Webinar
Corporate Tax - Review of Tax Planning This two-day seminar provides practitioners with a refresher on technical and tax planning issues for corporations. Although the seminar reviews taxation for public and private corporations, the session primarily focuses on the taxation of private companies.	Two segments Jun-09 & Jun-10 *Available Online On-demand*	9am-5pm	Live Webinar
Corporate Tax - Shutting Down the Corporation This seminar will focus on the many tax issues that arise, from a compliance and planning perspective, when shutting down a corporation. Common traps and planning opportunities that arise when shutting down private corporations via dissolution, amalgamation, or wind-up will be covered.	Jun-08 Jul-08 *Available Online On-demand*	9am-12:30pm 9am-12:30pm	**In-person, Vancouver** Live Webinar

Corporate Tax - Small Business Deduction and Private Corporate Groups

Two segments Jul-05 & Jul-06 | 9am-12:30pm | Live Webinar

Available Online On-demand

While the small business deduction reduces the amount of income tax for many corporations, the myriad of rules, regulations, and recent changes has significantly expanded the complexity. This seminar covers the unique taxation issues that apply to groups of privately held companies and their access to the small business deduction.

Creative Use of Partnerships in Tax Planning

Jun-02 | 9am-12:30pm | Live Webinar

This seminar will focus on the use of partnerships in creative tax planning, including some of the more common issues and pitfalls encountered by practitioners.

Employing Contractors and Contracting Employees: Sorting Out Tax and Legal Issues

Jun-01 | 8am-10am | Live Webinar

This seminar will distinguish between employment and independent contractor relationships and examine the liabilities and advantages of each type of relationship. In addition, the seminar will highlight some of the tax planning opportunities as well as areas of potential concern associated with these relationships.

Income Tax - Principal Residences

Jul-13 | 9am-12:30pm | Live Webinar

Available Online On-demand

Many Canadians own a principal residence, but they often assume that the gain on the sale of their home is tax free and may lack an understanding about the tax implications of other transactions involving these properties. This seminar examines all aspects of principal residences from a federal tax perspective, including ambiguous situation and the unexpected issues or outcomes that can arise in such cases.

» **INSTRUCTOR** Read more about instructor Hugh Woolley.

Income Tax - Real Estate Real estate transactions usually involve large amounts of capital, and can be impacted significantly by tax rules and restrictions. This seminar identifies and reviews significant income taxation issues arising from various aspects of real estate activities and includes practical, business-focused suggestions for dealing with such issues.	Jul-06 Jul-15 *Available Online On-demand*	9am-5pm 9am-5pm	Live Webinar **In-person, Vancouver**
Income Tax – Starting Up a Business This seminar focuses on the many tax issues that arise – both compliance and planning related – when starting a business. Common traps and planning opportunities for private companies are reviewed. Starting with an overview of forms of business, including pros and cons of each, the seminar will present structuring decisions for tax efficiency and to preserve access to losses. Participants will also gain an understanding of planning opportunities in the start-up phase and employee issues.	*Available Online On-demand Only*	3.5 Hours	On-demand
Personal Tax - Review of Tax Planning This two-day seminar in personal tax is designed for those who desire to update and refresh their knowledge in both technical and tax planning issues for individuals, trusts, and partnerships, with a primary focus on the taxation of individuals.	Two segments Jun-20 & Jun-27 *Available Online On-demand*	9am-5pm	Live Webinar
Tax for Controllers Controllers in small to mid-sized private companies have a wide range of responsibilities which can either have an impact on taxation or require tax-related reporting. This two-day course is compliance oriented with a high-level review of a wide range of issues and a focus on issue identification.	Four segments May-30, May-31, Jun-01 & Jun-02 *Available Online On-demand*	9am-12:30pm	Live Webinar

» **DIDN'T FIND A SEMINAR?** Other Corporate & Personal Tax titles may be available on-demand. If you are looking for seminars on Commodity Tax, on-demand titles may also be available.

NOT-FOR-PROFIT ORGANIZATIONS

Taxation - Registered Charities and NFPOs This seminar will provide a detailed technical review of the numerous income tax issues faced by registered charities and NFPOs, including real-world examples and case studies to provide participants with practical and useful takeaways to avoid loss of tax status, financial penalties, and bad press. Participants will gain the ability to identify tax issues, assess related risks, comply with the income tax rules, and complete charity and not-for-profit organization returns.	Jun-14 *Available Online On-demand*	9am-5pm	Live Webinar

» **DIDN'T FIND A SEMINAR?** Other Not-for-Profit Organizations titles may be available on-demand.

TRUSTS & ESTATES

Life-Interest Trusts as Will Substitutes This seminar focuses on why and how joint spousal or common-law partner trusts and alter ego trust are commonly used as will substitutes in British Columbia. It will review the requirements imposed by the Income Tax Act for a trust to qualify as an alter ego or a joint spousal or common-law partner trust and the design features of trust agreements for these types of trusts.	Jun-09	9am-12:30pm	Live Webinar
RIP - Estate Planning This seminar provides a detailed review of important estate planning matters for practitioners who deal with owner-managers or clients with a high net worth. Participants will gain enhanced estate planning skills, an introduction to important tax and estate planning concepts, useful tips, and an updated reference source. Participants will develop a working understanding of how to initiate and undertake effective estate planning for clients while maintaining flexibility in the estate plan to manage risk.	Jul-11	9am-5pm	**In-person, Vancouver**

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Taxation of Domestic Trusts - Fundamentals | Jun-07 | 9am-5pm | Live Webinar

This seminar will provide an overview of trust relationships, how to complete basic returns for trusts and their beneficiaries, and how to identify and communicate basic tax planning benefits and opportunities that involve family trusts. Participants who prepare trust returns or who advise clients with trust structures, or who are considering trust structures, will gain a functional knowledge of the applicable tax rules and the ability to identify potential problems.

Available Online On-demand

» **DIDN'T FIND A SEMINAR?** Other Trusts & Estates titles may be available on-demand.

US & INTERNATIONAL TAX

US Personal Tax - Fundamentals | Jun-17 | 9am-5pm | Live Webinar

This course will provide a general understanding of U.S. individual income taxation and Federal filing requirements of U.S. citizens, residents, and non-resident aliens of the U.S.

Available Online On-demand

US Corporate Tax - Fundamentals | Jun-27 | 9am-5pm | Live Webinar

This seminar will provide a general overview of the U.S. corporate taxation system, which includes the U.S. Internal Revenue Code and the way in which this code imposes tax and filing requirements on Canadian and U.S. corporations.

Available Online On-demand

» **DIDN'T FIND A SEMINAR?** Other US & International Tax titles may be available on-demand.

TECHNOLOGY & INNOVATION

BUSINESS TRANSFORMATION & EMERGING ISSUES

2022 Technology Update | May-31 | 9am-12:30pm | Live Webinar

Are you ready to learn about the latest trends in technology? Do you sometimes feel lost in the technology jungle? Would you like clear guidance regarding Windows, Office, the cloud, security, and other technology-related issues? This fast-paced and highly informative seminar is sure to ramp up your return on technology investment.

3 Ways Digital Transformation is Reinventing Accounting | Jul-26 | 9am-12:30pm | Live Webinar

Digital transformation is shaping the future of accounting and the pace of digital change is faster than ever. No accountant can ignore the onslaught of AI, automation and big data and during this session you will learn how technology is transforming accounting and what you can do to future-proof your finance career.

Blockchain Essentials for CPAs | Jun-02 | 1:30pm-5pm | Live Webinar

What could blockchain mean for the CPA profession? Explore near-term implications by looking at how blockchain impacts business processes, and how to approach risk identification and mitigation in a blockchain environment. Then identify the longer-term questions that blockchain raises for the profession.

» **THIS COURSE IS LED BY** Tejinder Basi and Chris Rowell, read their article on blockchain.

Cloud Computing | Two segments May-25 & May-26 | 9am-12:30pm | Live Webinar

Learn the fundamentals of cloud computing, the necessary skills to determine if cloud computing might be right for your organization or for your clients, and how to migrate to cloud-based solutions while avoiding major pitfalls along the way.

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Emerging Technologies for Accountants, Including Blockchain and Cryptocurrencies Unlike technologies we use every day, many emerging technologies have the potential to change how we work in the future. This session will cover an assortment of technologies which are nearing mainstream adoption and help you understand what they do, how they work, as well as some of the potential risks and rewards they offer potential users.	Jul-20	9am-12:30pm	Live Webinar
Five Success Strategies for Your Technology Projects Technology advances are disrupting businesses and the pace of digital change is accelerating. Discover how to navigate disruption and leverage best practices in technology delivery to grow your business.	Aug-11	9am-12:30pm	Live Webinar
Foundations of Blockchain Gain a holistic overview of blockchain from a business (non-technical) perspective, including what it is and what it can do, how it is being applied today, and its potential to transform business and industry.	Jun-02	9am-12:30pm	Live Webinar
Securing Your Data - Practical Tools for Protecting Information Learn about the latest tools and techniques for securing your data, including encryption, virus protection, secure communications, electronic signatures, secure authentication, and more. Discover how to implement a very practical, five-step approach to securing your PC, and the types of questions you should ask your staff to ensure server-based information remains protected.	Jun-23	9am-12:30pm	Live Webinar

Technology for CPAs - Don't Get Left Behind Survey today's IT environment, learning about computer hardware, software (including Office 2019), operating systems (including Windows 10), and what they mean for you and peripheral devices. Learn about significant trends in information technology and how to take advantage of the opportunities presented by these trends. Learn from real-time demonstrations of practical applications of the latest tools which can provide you with knowledge you need to harness the power of technology.	Two segments Jun-09 & Jun-10	9am-12:30pm	Live Webinar

» **DIDN'T FIND A SEMINAR?** Other Business Transformation & Emerging Issues titles may be available on-demand.

SOFTWARE & TOOLS

Advanced Excel For experienced Excel users seeking to elevate your skills, this seminar will provide critical advanced Excel skills in six key areas: collaborating, using tables, external source data, complex formulas, advanced data analysis tools, and visualization techniques.	Two segments Jun-16 & Jun-17 Jul-21	9am-12:30pm 9am-5pm	Live Webinar **In-person, Vancouver**
Advanced Excel Data Magic With tools such as Data Models, Power Query, and Power Pivot, today's versions of Excel offer unparalleled opportunities to move beyond traditional reporting techniques. If you are interested in advancing your reporting processes and minimizing your dependence on formulas, then this is the one class you cannot afford to miss.	Jul-22 Two segments Jul-25 & Jul-26	9am-5pm 9am-12:30pm	**In-person, Vancouver** Live Webinar

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An End to Manual Effort in Excel: The Power Query Effect 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 simple, but an investment in the future, refreshable with a single click when next needed. » **INSTRUCTOR** Read more about instructor Ken Puls	Jun-07	9am-5pm	Live Webinar
Best Word, Outlook, and PowerPoint Features Most professionals routinely use Word, Outlook, and PowerPoint, but many are self-taught and often use inefficient techniques. If that describes you, then make sure to attend this seminar to learn how you can work much more efficiently when using these tools.	May-24	9am-12:30pm	Live Webinar
Budgeting and Forecasting Tools and Techniques Learn how to achieve a greater return on your budgeting and forecasting activities by taking advantage of various tools and techniques available in today's market. In addition to learning about how to utilize Excel more effectively for budgeting and forecasting activities, you will also learn about other tools, and how reducing your dependency on Excel can lead to better results.	Two segments Jun-13 & Jun-14	9am-12:30pm	Live Webinar
Creating Financial Statements in Excel Power Pivot In this course we will explore the data structure and measures required to build financial statements using the DAX formula language. We will start by reviewing the required Chart of Account setup and follow this with key DAX patterns for creating Profit and Loss, Balance Sheet, Statement of Cash Flow, and Expected Actuals statements.	Jul-14	9am-5pm	Live Webinar

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Creating Vibrant Dashboards Tell a story using effective data visualization tools in Excel with this one-day course. Examine charts, conditional formatting, and other techniques and showcase the results in a dynamic and engaging dashboard.	Jul-12	9am-5pm	Live Webinar
DAX Formulas for Power Pivot Up your DAX game so that you can make your PivotTables show the exact aggregations you need. From creating simple measures to controlling percent of grand totals which don't lose their context upon filtering, to advanced patterns to control date period intelligence, we'll cover it here.	Jun-14	9am-5pm	Live Webinar
Excel 1: Core Data Analysis This hands-on course is an intensive program that will transform participants into Excel "power users." The course is focused on the pertinent Excel tools that are required in a business environment to efficiently analyze and manipulate data and to create compelling financial analyses. Participants will also learn numerous tips, tricks, and keyboard shortcuts to increase efficiency. Assignments, handouts, and examples will be used throughout the day.	May-26	9am-5pm	Live Webinar
Excel 3: Dynamic Dashboards This course provides practical tips and hands-on application to a variety of data management, charting and formatting skills in an Excel environment. Participants will build a series of charts in order to create a dashboard. A variety of chart types will be explored. Automating titles, creating informative labels and text boxes and learning best practices for dashboard design and construction will be covered.	Jun-02	9am-5pm	Live Webinar

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Excel 365: Advanced Data Analysis Excel 365 recently introduced new features which are the biggest changes to Excel's core functionality in decades. This hands-on course is an intensive session that will teach participants to use new features in Excel 365 to complete analytical work more efficiently and accurately. Participants will also learn how this new functionality can replace or supplement older methods of analysis in Excel. Assignments, handouts, and examples will be used throughout the day.	Jun-21	9am-12:30pm	Live Webinar
Excel Best Practices Gain an in-depth understanding of the best ways to work with Excel by learning best practices associated with Excel spreadsheets in each of the following areas: creating and editing Excel workbooks, securing Excel workbooks, collaborating with others in Excel, and reporting on data contained in Excel. Ensure that you utilize Excel to its fullest potential.	Two segments Jun-06 & Jun-07	9am-12:30pm	Live Webinar
Excel Boot Camp If you are ready for intensive Excel training, then this course is for you. Using accounting-centric examples, developed for and by accountants, this course takes you through Excel from A to Z and shows you how to take your use of Excel to the next level.	Four segments Aug-08, Aug-09, Aug-15 & Aug-16	9am-12:30pm	Live Webinar
Excel Charting and Visualizations Learn how to create advanced charts that are interactive, dynamic, and aesthetically pleasing – three qualities that will help to ensure that your audience will understand the data you are presenting. Create visualizations that will effectively communicate your data.	Jul-07	9am-12:30pm	Live Webinar
Excel Financial Models and Analysis This hands-on workshop will provide you with the skills to build financial models for use in decision-making, analysis, and forecasting. We'll also work with the many business intelligence (BI) features in Excel for reporting and presentation.	Jun-24	9am-5pm	Live Webinar

ACCOUNTING & ASSURANCE
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Management Accounting
ETHICS
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Business Valuations
Corporate Finance
Financial Modelling
PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT
Communication & Negotiation
Self Management & Wellness
Teamwork & Leadership
Resilient Leadership Certificate Program
PRACTICE MANAGEMENT
STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE
Risk Management & Fraud
Strategy, Governance, & Human Resource
Strategic & Advanced Strategic Management Certificate Programs
TAXATION
Corporate & Personal Tax
Not-For-Profit Organizations
Trusts & Estates
US & International Taxation
TECHNOLOGY & INNOVATION
Business Transformation & Emerging Issues
Software & Tools
WEALTH MANAGEMENT
PD NEXUS DAYS

Excel Tips, Tricks and Techniques for Accountants Learn countless tips, tricks, and techniques to improve your general level of productivity, reduce the amount of time you spend on mundane tasks, such as formatting, and customize Excel for greater accuracy and efficiency. You will also learn valuable formula-building skills, best practices for linking Excel data from other worksheets and workbooks, and how to streamline report generation and printing processes.	Two segments Jun-28 & Jun-29	9am-12:30pm	Live Webinar
Excel: Specific Skills for Budgeting, Planning & Forecasting Need help to improve budgeting, planning, and forecasting processes in your business? This hands-on workshop will help you apply specific skills in Excel to do just that. Work on data consolidation for budgets, securing workbooks, and forecasting and charting techniques for presenting budgets.	Jul-15	9am-5pm	Live Webinar
Excel: The Next Level of Skills It is time to take your Excel skills to the next level! Discover the best advanced features and functions in Excel to make your accounting and finance tasks easier, faster, and more accurate and increase the complexity of your data analysis and reporting.	Jun-17 Jul-08	9am-5pm 9am-5pm	Live Webinar **In-person, Vancouver**
Hands-on Techniques to Create Effective Financial Visuals in Excel and PowerPoint Too many financial presentations rely on huge spreadsheets or paragraphs of text copied onto slides. Learn how to create visuals – clear, effective graphs in Excel or PowerPoint, diagrams that show comparison of value in new ways, and time-based diagrams – that clearly communicate the message behind the numbers.	Jul-13	9am-5pm	Live Webinar

We encourage you to check our website for the most up-to-date schedule as offerings can be added, changed or cancelled

Seminar Schedule
PD Passports
Nexus Days
Executive Programs
Certificate Programs

How to Present Financial Data Effectively Using PowerPoint Audiences want financial professionals to tell them the story behind the numbers, not overwhelm them with spreadsheets. Discover how to take a different approach to financial presentations - make it about the message, not the numbers. Learn how to create a structured message with focused content and effective visuals.	Jul-12	9am-5pm	Live Webinar
Improving Productivity with Microsoft/Office 365 Cloud Applications Many Office 365/Microsoft 365 subscriptions include powerful cloud services for improving productivity. Foundational services, such as SharePoint Online, OneDrive for Business, and Exchange Online, join with other powerful tools such as Teams, Planner, Power Automate, Forms, and Power Apps to provide a productivity platform second to none. Learn about the "rest" of Office 365 and how these cloud-based applications can enhance personal and team productivity, while simultaneously facilitating remote working arrangements.	Jun-01	9am-12:30pm	Live Webinar
Introduction to Excel Macros Designed for those with little, if any, experience working with macros, this course will teach the fundamentals of creating and working with macros in Excel. More specifically, you will learn how to use Excel's Macro Recorder to write simple yet effective macros; how to secure and share macros with other Excel users; how to create user-defined functions to solve specific accountant-centric problems in Excel; and how to create macros that run automatically when a user opens a workbook.	Jul-11	9am-12:30pm	Live Webinar

Mastering Advanced Excel Functions Learn about many of Excel's newer tools, including XLOOKUP, SUMIFS, SWITCH, and STOCKHISTORY, as well as advanced financial functions, such as IPMT and PPMT, and how to retrieve summarized data easily using GETPIVOTDATA and CUBEVALUE. Additionally, learn how to make sophisticated calculations easier with Dynamic Array formulas, how to harness the power of the AGGREGATE function, and how to create more accurate forecasts with Excel's FORECAST.ETS function.	Aug-04	9am-12:30pm	Live Webinar
Microsoft Office 365 - All the Things You Need to Know Microsoft Office 365 continues to grow and evolve, yet most Office 365 users are utilizing only a fraction of the tools available in their subscription. Powerful resources such as SharePoint Online and Microsoft Teams can change how your entire organization communicates and collaborates, while more personal apps such as Planner, Flow, and Sway allow individuals to work more efficiently and effectively in virtually all facets of their jobs.	May-27	9am-12:30pm	Live Webinar
Rapid Dashboard Development with Power BI Desktop Power BI Desktop provides access to compelling dashboards that are attractive, interactive, and best of all, incredibly easy to both build and refresh. This hands-on session will explore sourcing data, data visualization and transformation, data model relationships, DAX measures, interactive visuals, and sharing dashboard solutions.	Aug-23	9am-5pm	Live Webinar

» **DIDN'T FIND A SEMINAR?** Other Software & Tools titles may be available on-demand.

WEALTH MANAGEMENT

A Six Point Plan for Financial Freedom Designed for those interested in helping their friends, family, and clients to retire well without having to take risks, this course will detail the non-traditional view of money management that many investment advisors don't want to talk about.	Jun-23	9am-5pm	Live Webinar
Designing Retirement Income In this fast-paced webinar, learn about retirement cash flow considerations on retirement age, CPP, RRIF, income splitting, tax planning, estate factors, insurance, and real estate.	Two segments Jun-01 & Jun-02	9am-12:30pm	Live Webinar
Everything You Need to Know about Government, Bank, and Personal Debt This course is on the subject many people don't want to think about: debt. It will delve into all you need to know about the subject from the federal to the provincial level, and will help you understand how debt fuels the world and how you can optimize your personal situation as a result.	Jun-16	9am-12:30pm	Live Webinar
Financial Planning for 30-to-40-Year-Olds For young professionals today, most major life decisions and events often happen between the age of 27 and 35. The course will help you prepare for decisions related to all of the financial issues and strategies typically associated with the first phase of your post-school life. And as you outgrow the advice of parents this course will prepare you to make independent financial decisions confidently.	Jun-09	9am-12:30pm	Live Webinar
How to Build an Investment Portfolio and Select Investment Products This is an introductory course for individuals looking to learn the basics in a very thorough way. It is a fast-paced session with informative and direct commentary on today's investment landscape in Canada that will teach you a six-step approach to investment portfolio management.	Two segments Jun-15 & Jun-16	9am-12:30pm	Live Webinar

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Strategy, Governance, & Human Resource
Strategic & Advanced Strategic Management Certificate Programs

TAXATION
Corporate & Personal Tax
Not-For-Profit Organizations
Trusts & Estates
US & International Taxation

TECHNOLOGY & INNOVATION
Business Transformation & Emerging Issues
Software & Tools

WEALTH MANAGEMENT

PD NEXUS DAYS

Smoke and Mirrors: Financial Myths that will Ruin Your Retirement Dreams There is a lot of confusion when it comes to retirement planning. This course will simplify the process of planning your retirement by pointing out the myths perpetuated by the financial services industry that make them money at your expense.	Jul-28	9am-5pm	Live Webinar
The ABCs of Personal Insurance Learn the essentials of insurance concepts and products in an educational session with no sales pitches. Find out how to determine what amount of insurance you need, the different types of policies that exist, differences in costs and benefits, and strategies to determine what is suitable for you.	Jun-08	9am-12:30pm	Live Webinar
The Procrastinator's Guide to Retirement This course is designed to show you that it is possible to plan for retirement later in life. In fact, if you play your cards right, you can build a significant nest-egg in as little as ten years or less. And don't worry if you are younger, as all the concepts will still be useful to you.	Jul-07	9am-5pm	Live Webinar
The Simplest Personal Finance Strategy Ever This course is designed to show you the dangers that exist with a net worth focus. Delve into a much better strategy – The Cash Cow Strategy – that focuses on the cash flow implications of everything you acquire from now on rather than where they go on a net worth statement.	Jul-21	9am-5pm	Live Webinar

» **DIDN'T FIND A SEMINAR?** Other Wealth Management titles may be available on-demand.

PD NEXUS DAYS

Business and Leadership Insights Join us for an empowering day of live virtual presentations to learn strategies for improving your business, your leadership abilities, and your overall wellbeing. Featuring a new third stream of breakout sessions on work-life harmony, this fast-paced day will introduce you to innovative ideas, expand your knowledge, and sharpen your skills.	Jul-07	8:30am-4:30pm	Live Webinar
Information Technology Insights 2022 PD Nexus: Information Technology Insights 2022 strives to be the touchstone conference-style PD Day for members and organizations who want the best for the customers and clients. Each session – plenaries and breakouts – have been custom tailored to enhance the day-to-day working environment of professional accountants.	Jul-18 & Jul-19 Single day registration also available	8:30am-4:30pm	Live Webinar

» **READ MORE** About our Spring/Summer Nexus Days offerings on pages 5 and 67.

Seminar Schedule
PD Passports
Nexus Days
Executive Programs
Certificate Programs

Seminar Schedule
PD Passports
Nexus Days
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Certificate Programs

PD PASSPORTS

Your most economical, cost-effective, and convenient savings program

Bulk Savings

The more you learn, the more you save

Reminder

Use on courses through to **August 31, 2022**

Special Discount

Additional 10% discount on 2021-22 Passports Purchased **up to August 31, 2022**

EXCLUSIVE DISCOUNTING FOR
UP TO
35%
OFF SEMINAR PRICES
2021-2022 PASSPORT SEASON

Actual savings will depend on your PD Passport usage – the more you learn, the more you save – but passport credits can be used in any combination of two-hour, half-day, or one- to two-day CPABC PD seminars, as well as PD Nexus Days, CPABC certificate programs, and web-based seminars that are passport-valid.

CPABC
PD Passports

PD PASSPORTS

REMINDER **Aug 31 2022** 2021-22 PASSPORTS EXPIRE

Personal PD Passport

For designated CPABC **members only, (non-transferable)**.

Each PD Passport is equivalent to **60 credits** of passport-valid CPABC PD seminars.

60 CREDITS

AN EXAMPLE OF POTENTIAL SAVINGS

4 one-day seminars (40 credits)
3 half-day seminars (15 credits)
2 online PD (4 credits)
1 online PD (1 credit)

Without Personal PD Passport = $2,175

1 Personal PD Passport = $1,485

You could save $690
or 32% discount

Flexi PD Passport

Can be purchased by both **members and non-members**, fully transferable.

Each Flexi PD Passport is equivalent to **60 credits** of passport-valid CPABC Professional Development seminars.

60 CREDITS

AN EXAMPLE OF POTENTIAL SAVINGS

3 one-day seminars (30 credits)
1 PD Nexus Days (12 credits)
3 half-day seminars (15 credits)
1 online PD (3 credits)

Without Flexi PD Passport = $2,110

1 Flexi PD Passport = $1,845

You could save $265
or 13% discount

Mini PD Passport

For designated CPABC **members only, non-transferable**.

Each PD Passport is equivalent to **30 credits** of passport-valid CPABC PD seminars.

30 CREDITS

AN EXAMPLE OF POTENTIAL SAVINGS

2 one-day seminars (20 credits)
2 half-day seminars (10 credits)

Without Mini PD Passport = $1,080

1 Mini PD Passport = $899

You could save $181
or *17% discount*

PD Nexus Days

stay Virtual for Spring/Summer 2022

PD Nexus Days are unique PD seminars with multiple short sessions throughout the day.

Our Nexus Days are focused on exposing members to new knowledge and discussions on topical subject matters, in environments where members can also benefit from networking and learning from peers.

CPABC
Nexus Days

PD NEXUS DAYS | SPRING/SUMMER 2022

Business & Leadership INSIGHTS — Adaptation & Growth

July 7, 2022

PD Passport Valid: 12 Credits | $380

Join us for an empowering day of live virtual presentations to learn strategies for improving your business, your leadership abilities and your overall wellbeing. Featuring a new third stream of break-out sessions on work-life harmony, this fast-paced day will introduce you to innovative ideas, expand your knowledge and sharpen your skills. Now is the time to learn new skills and ideas at Business & Leadership Insights, including discovering new ways to facilitate hybrid meetings, a new framework for strategic planning and how to declutter and stay organized.

Information Technology INSIGHTS — Keeping Your Edge

July 18 & 19, 2022

PD Passport Valid

Both Days: 24 Credits | $700

Single Day: 12 Credits | $380

PD Nexus: Information Technology Insights 2022 strives to be the touchstone conference-style PD day for members and organizations who want the best for their customers and clients. Each session – plenaries and breakouts – have been custom tailored to enhance the day-to-day working environment of professional accountants. This PD Nexus Day will benefit accounting professionals who need to keep current with the latest technologies, as well as determine what applications are worth implementing. It will offer practical technology topics designed to help alleviate the heavy workloads of today's busy professionals.

» **PRICING** Already reflects discount

CPABC
Nexus Days

EXECUTIVE PROGRAMS

Building Your Expertise

Deepen and broaden your perspectives and knowledge with CPABC's Executive Programs.

Controller's Program

Created with the aspiring and new Controller in mind.

The Controller's Operational Skills Program focuses on the core technical processes and procedures of the financial role.

Objective As a controller, you are expected to be the financial expert in your organization. You are relied upon to produce, analyze, and interpret the financial data that will be used by the executive team to make key financial decisions. To excel, you must continuously demonstrate leading-edge knowledge and keen business acumen.

May 11-14
Online virtual

Jul 14-15, 18-19
Online virtual

September 21-24
In-person, venue to be announced

December 7-10
To be announced

The Controller's Management Program focuses on honing your personal and interpersonal effectiveness.

Objective As a controller, you not only provide financial expertise in your organization, you provide leadership as a key member of the management team. Building on the foundation of your technical skills, your management and leadership skills will take you and your organization to the next level.

June 23-24, 27-28
Online virtual

September 25-28
In-person, venue to be announced

CFO Program

Geared towards aspiring and new CFOs.

The CFO's Operational Skills Program focuses on the strategic technical competencies of the role.

Objective Reporting to the CEO or president, the chief financial officer is the top job that leads, initiates, and manages the financial decision-making process within the organization.

In addition to being a senior advisor to the CEO and the board, the CFO has other roles: business partner, scorekeeper, commentator, expert, and custodian.

These multiple functions mean that the CFO has to see both the forest and the trees, needs to understand the business and its numbers, as well as lead, develop, and help execute the business strategy.

July 7-8, 14-15
Online virtual

October 23-26
In-person, venue to be announced

The CFO's Leadership Program focuses on developing the skills needed to be an influential leader in your organization.

Objective The role of the chief financial officer continues to evolve. Beyond technical expertise, today's CFOs need to make strategic financial decisions in a changing dynamic environment. This necessitates inspired, authentic leaders capable of solving challenging problems as a valued member of the c-suite. From supporting strategic decision making through to strong financial stewardship, there is a need for the CFO to demonstrate expertise in a broad range of areas, including regulation, globalisation, technology, risk, transformation, stakeholder management, reporting, and talent management. In short, they need to be truly effective leaders.

May 18-19, 26-27
Online virtual

November 16-19
In-person, venue to be announced

CFO as Navigator Program

Geared towards seasoned financial executives.

The CFO as Navigator Program is a stand-alone advanced program for more seasoned financial executives; it builds upon the foundational skills and concepts that add value and enhance the role within the organization.

Objective CFOs are under pressure and COVID has not made it any easier, every CFO is hearing call from the corporate boardroom to "step out and go beyond the box". Long gone are the days when the CFO was primarily focused on the traditional box of command and control, and Monthly/Quarterly/Annual (M/Q/A) financial and management reporting.

October 19-22
In-person, venue to be confirmed

The CEO Program

Geared towards current and aspiring leaders.

The CEO Program is a practical and provocative stand-alone advanced program for current and aspiring leaders seeking to excel in the executive suite.

Objective This proven, mini "executive MBA" program has been offered to hundreds of senior members of the accounting profession across the country for well over a decade. It is designed for both current and aspiring leaders seeking to excel with confidence in the upper echelons of executive responsibility. The testimonials from prior attendees are all you need to read to understand the benefits of "going back to school" to contend with the increasingly unpredictable demands of an ambiguous, volatile, disruptive, complex business environment.

June 6-9, 21-23
Online virtual

Enterprise Risk Management Fundamentals

Geared towards financial professionals seeking knowledge in risk management.

The Enterprise Risk Management Program is a stand-alone program for financial professionals of any level who are seeking to learn fundamentals and best practices in enterprise risk management.

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

June 13, 15, 17
Online virtual

November 7-9
In-person, venue to be announced

Smart Leaders 2024

Geared towards leaders in positions of executive responsibility.

Smart Leaders 2024 is a stand-alone program for leaders seeking to liberate their genius, to change the way they think, and to strengthen their capabilities as decision makers, risk-takers and innovators to meet the demands of an increasingly volatile and complex business environment.

Objective Organizations live or die on their leaders' ability to solve problems. This unique, provocative, time-tested learning experience has been offered to hundreds of executives across the country for over two decades. It's re-engineered yearly to keep up with the incessantly unpredictable challenges they must confront. The testimonials from prior attendees are all you need to read to understand the benefits of "going back to school" to deal with the demands of an increasingly ambiguous, volatile, complex business environment.

Nov 1-3, 15-17
Online virtual

The Optimal Negotiator

For serious deal makers only.

The Optimal Negotiator Program is a stand-alone program for professionals of any level who are seeking to obtain greater comfort and confidence in their resolve to get others to agree with them, or who aspire to mastery in the art of negotiation.

Objective Arguably the one skill leaders must master is the ability to get others to agree with them. In any undertaking of significance, whether personal or professional, knowing how to get adversaries to accept your point of view while seeing themselves as winners is crucial to your success and the prosperity of the enterprise you lead. Nor can you ever expect to ascend the corporate ladder without a solid understanding of fundamental negotiating principles and nuances or the ability to emulate those who consistently optimize deals.

September 13-15, 27-29
Online virtual

Leading with Emotional Intelligence

Geared towards leaders seeking a people-focused approach to your leadership style.

Leading with Emotional Intelligence is a comprehensive stand-alone program for professionals to learn, practice, and implement specific tools and tactics to build their leadership skills in emotional intelligence.

Objective The Leading with Emotional Intelligence Executive Program offers a comprehensive learning experience for professionals to learn, practice, and implement specific tools and tactics to build their leadership skills in emotional intelligence. Attendees will walk away with a deeper understanding of their soft skills and those of their peers, which ultimately impacts and improves their self-perception, communication, teamwork, decision-making, and stress management skills..

October 13-14, 18-19
Online virtual

Faculty

DR. VIJAY JOG is the founder of Corporate Renaissance Group (a Quisitive Company), a firm dedicated to driving better business management and performance. He has led CRGroup's growth in areas of strategic finance, corporate performance and dashboards, FP&A and analytics, strategy design and execution, helping clients bridge the gap between technology, HR and finance, designing incentive systems and conceptualizing and creating innovative software applications that are used by thousands of organizations around the world.

VIJAY FACILITATES
The CFO as Navigator Program

LINDA LUCAS, CPA, CMA provides CEO, COO, and CFO services to small- and medium-sized companies throughout the Lower Mainland in BC. She specializes in helping business owners identify and execute their strategic objectives, build strong teams, and achieve operational excellence. Additionally, she provides leadership training to management teams across all industries to develop confident, dynamic, and collaborative leaders of tomorrow.

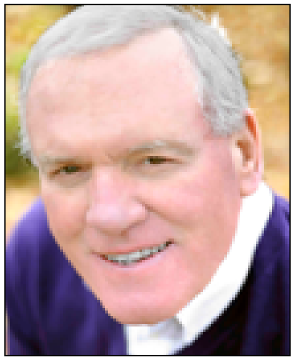
LINDA CO-FACILITATES
The Controller's Management Program

MIA MAKI, BA, MBA, FCPA, FCMA, is a principal of a consulting firm and a professor with the University of Victoria Gustavson School of Business, with over 25 years of teaching experience. She has worked in finance and accounting since 1986 and has experience in a wide variety of industries, including audio technology, airlines and aviation, not-for-profit, public accounting, marine transportation, fisheries monitoring, gaming, and other technology arenas.

MIA FACILITATES
The Controller's Operational Skills Program

LESLEY-ANN MARRIOTT, CEC, PCC, is a certified executive coach who holds the advanced credential of professional certified coach. A former executive in the food industry, Lesley-Ann has over 25 years of leadership and management experience. She has facilitated hundreds of corporate partnerships at the most senior levels of the world's largest food companies - Coca-Cola, Procter & Gamble, and she negotiated contracts in excess of $50 million and managed sales of over $2.5 billion based on dynamic, collaborative partnerships.

LESLEY-ANN CO-FACILITATES
The Controller's Management Program
The CFO's Leadership Program



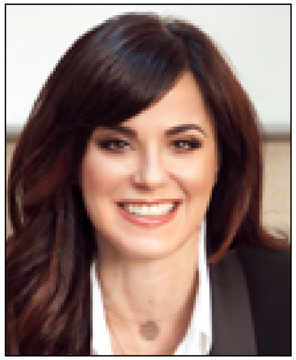
DR. JIM MURRAY is CEO of *optimal solutions international*, a firm dedicated to helping people achieve their full potential. Jim has taught courses for CPABC since 1982. He is the architect of several advanced residential programs for five provincial CPA bodies, has published four best-selling books, and provided his strategic counsel to well over 600 organizations. He has been nationally honoured by the university community and formally recognized for "excellence in the design and delivery of life-long learning". Read his full bio on *SmartLeaders.ca*.

JIM FACILITATES
The CEO Program
Smart Leaders 2024
The Optimal Negotiator

Faculty

JEFFREY D. SHERMAN, MBA, CIM, FCPA, FCA (Ontario), has over 25 years experience as an executive and corporate director in high tech, biotechnology/medical, financial services, and business services. He is a popular presenter, a frequent course director and course author for many organizations, and has created and presents executive development programs and one-day seminars for most provincial Chartered Professional Accountants organizations across Canada. He has written over twenty books including *Strategy and Planning Toolkit for Small and Medium Businesses* (published by CPA Canada).

JEFFREY FACILITATES
The CFO's Operational Skills Program



CAROLYN STERN, B.COMM, B.ED, PBD PRED, PBD In Bus, MA Leadership As a professor with the School of Business at Capilano University, Carolyn pioneered the integration of Emotional Intelligence into Capilano's curriculum. An Emotional Intelligence and leadership development expert, Carolyn combines real-world experience as both a business leader with more than two decades as a trainer and educator. Her company, EI Experience, provides leadership development and emotional intelligence training for all management levels and businesses of all sizes and scope. Since launching EI Experience in 2017, Carolyn has helped more than 15,000 business leaders leverage their emotional intelligence skills to connect with their diverse workforce and develop high-performing teams.

CAROLYN FACILITATES
The Leading with Emotional Intelligence Program

TAMMY TOWILL, MBA, FCPA, FCMA is a partner in the Cordura Group and Chair of the School of Business for Capilano University, providing business advisory services and related education and training programs to organizations and communities seeking growth or change.
For over 25 years, Tammy has worked with private and public sector companies throughout North America and Europe, providing education, training, and facilitating in leadership, strategy, business planning, and curriculum development and implementation. She has served on and worked with several boards in Canada and the US.

TAMMY CO-FACILITATES
The CFO's Leadership Program

WILLIAM (BILL) WESIOLY, CPA, CMA (Ontario), is a risk management consultant. His background is in the financial services industry, first with BMO and then with RBC. The last 15 years of his banking career was in successfully building and leading risk management programs.

He currently teaches with CPA Ontario and CPAs in other provinces including CPABC. His recent consulting assignments included Buduchnist Credit Union, Atlantic Credit Union, Hillfield-Strathallan College, Canadian Stewardship Services Alliance, Ministry of Environment Canada - Great Lakes Region, and the Ktunaxa First Nations. He is the author of a Management Accounting Guideline for CPA Canada – A Practical Approach for Managing Risks in Small- and Medium-Size Organizations.

BILL FACILITATES
Enterprise Risk Management Fundamentals

CERTIFICATE PROGRAMS

Certificate programs are a group of seminars that allow participants to acquire substantive knowledge in specific core business topics. A program certificate will be issued once participants attend and complete all the necessary seminars within that program.

» **EXCLUSIVE PRICING** Discounted pricing for these programs won't last....

CPABC
Certificate Programs

Strategic Management

This four-module program focuses specifically on the critical components of leadership and strategy: **Strategic Planning; Risk Management and Governance**; **Team Development**; and **Change Management**. Upon completion of all four modules, which do not need to be taken in any order, members will qualify for the Strategic Management Certificate.

Why take this program?

At completion, participants will have learned about the core competencies to successfully develop teams, enable change management within their organizations, risk assessment and governance best practices, and how to guide strategic planning into implementation through all phases of an organization's product/service life cycle.

Who is this program designed for?

Mid-managers and leaders transitioning to management or executive roles where this knowledge plays a key role in making, and successfully implementing, sound business decisions.

Advanced Strategic Management

This two-module program focuses on integrating frameworks and strategic plan implementation, through the application of critical components of leadership and strategy. It includes high-level frameworks for strategic planning, implementation and monitoring including risk assessment and determination of the impact of change management initiatives on governance and teams. Upon completion of the two modules – **Strategy: Maps**; and **Strategy: Links**, members will qualify for the Advanced Strategic Management Certificate. Completion of the Strategic Management Certificate Program is not a pre-requisite.

Why take this program?

At completion, participants will be able to demonstrate the ability to apply frameworks, best practices and models to different organizational scenarios, through case work and application to their organizations.

Who is this program designed for?

Graduates of the Strategic Management Certificate Program, or leaders and managers involved in and/or leading strategic management in their organizations, but who have not completed the Strategic Management Certificate Program.

Resilient Leadership

The five-part Resilient Leadership Certificate modules are:

- The Five Qualities of a Leader Who Thrives in a Crisis
- Energize Your Team Through Uncertainty
- Who's Listening?
- Manage Your Mindset and Emotional Well-being
- Balance Life, Work, and Overwhelm.

Each module can be taken as a stand-alone course, and modules will build on each other. However, in order to qualify for the Resilient Leadership Certificate, participants are required to complete all five modules.

Why take this program?

Right now, in this once-in-a-century crisis, leaders have extraordinary challenges. Resilient leadership is the first one. Without resilient leadership it will be impossible to have healthy employees who care about your business and who feel committed and invested enough to work hard on new solutions with hope, optimism, and sustained energy. This program will enable you to learn strategies and acquire tools to both be an example of resilience and build a resilient team.

Who is this program designed for?

This program is designed for leaders and emerging leaders at all levels who want to create a workplace culture that can recover, re-build, support people to do their best work, and create new opportunities for success and impact.

» **SAVE MORE** Register for all five modules of the Resilient Leadership Certificate for a reduced price.

Faculty

STRATEGIC MANAGEMENT & ADVANCED STRATEGIC MANAGEMENT

MIA MAKI, BA, MBA, FCPA, FCMA is a Principal of a consulting firm and a Professor with the University of Victoria Gustavson School of Business, with over 20 years of teaching experience.

RIEGHARDT VAN ENTER, CPA, CMA is a consultant with the Cordura Group providing business advisory services to organizations needing operational optimization or a new strategic focus. He has been working in the utility, engineering, aerospace & construction sectors for the past fifteen years.

RESILIENT LEADERSHIP

TAMMY ROBERTSON, MA is a life and leadership coach to leaders in industry and public practice, and has over 25 years of experience providing leadership and personal development seminars and keynotes.

» **LISTEN** How can you be a resilient leader? Listen to our podcast with Tammy Robertson.

Business Learning Institute (BLI)

Business Learning Institute (BLI) is a center facilitating the development and sharing of competencies and strategic knowledge required for leadership in today's rapidly-changing business environment. While BLI is equipped to serve all business sectors, it was originally founded to meet the needs of accounting and finance professionals. BLI provides the training and skills needed to help you advance professionally and innovate thoughtfully. BLI offers both synchronous (live) and asynchronous (on-demand) seminars on a wide range of topics, with a focus on leadership, technology, communication, and personal and career development.

BLI OFFERINGS

Corporate Finance Institute (CFI)

Archived Webinars

Corporate Finance Institute (CFI) courses are designed for finance professionals and industry practitioners who want to master the art of corporate finance. The courses move through three levels of mastery for anyone looking to be an expert in financial modeling, valuation, and financial analysis. Participants typically include professionals in entry to mid-level positions in financial planning and analysis (FP&A), corporate development, treasury, investor relations, and capital markets. Archived webinars are available to CPABC members at a special price and are also PD Passport valid.

CFI OFFERINGS

CPA Crossings

CPA Crossings is a global leader in online professional education for CPAs and other financial professionals. Established in 2001, CPA Crossings offers scheduled webinars on a range of topics including ethics, fraud, business, personal development, technology, and other fields of study. All of these courses are developed and presented by a team of 60 instructors, recognized as experts in their respective fields of study.

CPA Crossings OFFERINGS

ED4S

ED4S is a mission driven, impact first, for profit organization based in Montreal, offering online courses designed for enterprises and sustainability self-starters. Their mission is to empower individuals and companies to have a holistic way of looking at issues and opportunities and allowing them to make more integrated decisions to build more sustainable economies and societies.

ED4S OFFERINGS

Executive Finance

Executive Finance is a hands-on, experiential-based thought leadership lab for financial professionals. Executive Finance curates the best ideas they can find, then tests these ideas with companies to develop tools, methodologies, and executive development courses. Their partners work in finance as executives, corporate directors, educators, speakers, and authors – many times simultaneously, which makes for rich content and stories. In general, Executive Finance's online courses focus on developing financial professionals to become financial executives; they also offer courses for newer financial professionals in areas such as ethics, financial analysis, and corporate finance.

Executive Finance OFFERINGS

FlipU

What if online learning was even better than in-person? At FliP University, we've taken the best of in-person workshops and put it online. Our content is "pracademic" (that is practical + academic), whimsical, transformative, and thoroughly modern, at the forefront of organizational needs. It is based on research from cognitive neuroscience, creativity, social, organizational and positive psychology, learning theory, and clinical practice.

FlipU OFFERINGS

K2E Canada Inc

Technology-Focused Webinars

CPABC in partnership with K2E Canada Inc are pleased to present technology-focused webinars to our members. Participants who take these webinars will have the opportunity to learn from an award-winning team of instructors with literally hundreds of years of experience in helping professionals identify, address, and solve issues through the practical application of technology. Webinars address a variety of topics, including Excel, QuickBooks, PDFs, accounting solutions, and Microsoft Office and are available both as live presentations and in an on demand format.

K2E OFFERINGS

LumiQ

LumiQ is a podcast company where engaging conversations with business leaders also count as verifiable CPD. We go out and find business, accounting and finance leaders to interview about their expertise and experiences, and you get verifiable CPD for learning from the world's top minds. Some days, you'll find yourself immersed in the world of start-ups, or captivated with the story of how Bernie Madoff pulled off the largest fraud in human history. Maybe you'll want to learn about how the music industry's business model has changed over time? Whatever you're interested in and will feed your natural curiosity of how businesses work, you'll find on the LumiQ podcast. LumiQ is an enjoyable way to earn CPD.

LumiQ OFFERINGS

Parametric Pro Consulting

Parametric Pro Consulting is a full-service consultancy specializing in strategy, finance, and real estate. Based in Victoria, BC, the firm has served a range of local, national, and international clients, including for-profit and not-for-profit organizations, crown corporations, municipalities, developers, and realtors. Shaped by partners' decades of real-world experience, Parametric Pro Consulting delivers professional development education through on-demand courses, workshops, and seminars, with a particular focus on management consulting, strategic advisory, and commercial real estate. Their educational content supports learners with a range of expertise, from entry-level to senior-level business professionals.

Parametric Pro OFFERINGS

ProDio Audio Learning Inc

CPABC is pleased to continue to partner with ProDio Audio Learning Inc. (ProDio), which creates audio-only verifiable PD courses delivered via mobile application; a convenient and flexible way to complete your PD courses "on the go" via your smartphone or tablet, or listening via the web desktop version. ProDio offers high quality, audio-only courses that are engaging and concise, testing your learning along the way. Course content includes expert interviews, stories, case studies, and media clips. Create your own unique learning experience in an audio-only environment that gives you freedom from your screen while you listen and learn – anytime, anywhere.

Pro Dio OFFERINGS

Sheriff Consulting

Sheriff Consulting specializes in the design and delivery of professional and leadership skills courses for accounting and finance professionals. Sheriff Consulting's mission is to provide an engaging approach to your continuing professional development. Their online content is designed for maximum engagement using the latest developments in adult learning pedagogy and current research in technical, professional, and leadership skills.

Sheriff OFFERINGS

CPABC PD Video On-Demand

CPABC has video recorded live, in-person offerings and made these seminars available as on-demand videos online, along with the corresponding course materials. Note that this is purely a self-study product, and there will be no access to facilitators for questions and answers. Dates published with the on-demand titles reflect when the videos were recorded – information presented was up-do-date at the time of recording. Each title qualifies for verifiable CPD hours upon successful completion of a quiz at the end of the seminar.

PD Video OFFERINGS

PD AudioWeb

PD AudioWeb seminars are direct audio recordings from live PD seminars; corresponding PowerPoint visuals and instructor materials are available as MP4 and PDF files respectively. PD AudioWeb seminars are eligible for verifiable CPD hours (hours are indicated in brackets) – in order to claim these hours as verifiable, you will be required to successfully complete a short quiz, also accessible via the website. Upon successful completion of the quiz, you will be able to print a certificate of completion.

PD AudioWeb OFFERINGS

IN-HOUSE PRESENTATION SERVICES

Making Corporate Training Happen

If your organization is finding it difficult to provide corporate training during the pandemic, consider using CPABC PD In-House services. The majority of our courses have been converted to an online platform, and we are able to continue providing relevant and timely training tailored to your group. At this time, all training will be offered via Zoom Conferencing.

Benefits of Personalized Training

FLEXIBLE Work around your schedule, your location, and your audience.

CUSTOMIZABLE & CONFIDENTIAL We can discuss your requirements in detail and work with the instructor. You control who attends, so discussions at the seminar can be kept confidential.

COST EFFECTIVE Cost savings vary depending on class size, but you will eliminate travel time and expenses.

CONVENIENT We will draw from an exceptional pool of instructors and find the right ones for you. We will also supply the seminar materials.

OTHER BENEFITS Great for team building, and gaining more personalized interaction with the instructor.

Contact us at **pdreg@bccpa.ca** for more information.

IN-HOUSE PRESENTATION SERVICES

Between February 2021 and January 2022, we successfully provided virtual courses for our in-house clients in a safe and convenient environment

60+
sessions offered

2,000+
participants from 31 organizations (industry & public practice)

4.3/5.0
average course rating

300+
seminar titles to select from

Testimonials

"With the growing number of employees in our finance department who require professional development, we decided to look at CPABC's in-house seminar offerings to align training and development for all our team members. This gave us an opportunity to not only provide training for those who require PD points but also for the rest of team. Our first session was received very well by our team and we will definitely consider this again for the future."

Helena Ng, Finance Coordinator
E-Comm 911, Vancouver, BC

"The Corporate Services Team at the City of Kamloops is a multi-focused group supporting the needs of the organization in the areas of risk management, finance, legislative services, procurement and technology. Finding professional development opportunities, along with a chance to create team-building opportunities can be challenging. The PD In-House Program offered by CPABC created an opportunity for our team to have a unique professional development opportunity and helped to strengthen the dynamics of the team. This is definitely a program we will be keeping on our radar for future development opportunities."

Dave Hallinan FCPA, FCMA
Planning and Procurement Manager, City of Kamloops

"Our CPABC in-house professional development session was tailored and focused on topics pertinent to BC Ferries. As well as being a cost effective way to deliver training to a large group, it provided an opportunity for us to discuss specific issues applicable to BC Ferries with guidance from a knowledgeable instructor. The ability to easily create a personalized PD session was very appreciated!"

Tracy Yaeger, Assistant Corporate Controller, Finance Division,
BC Ferries, Victoria, BC

CPABC PD Seminars via Zoom Conferencing

Frequently Encountered Issues

In most of these scenarios, solutions will be dependant on your specific device and the operating system that device is running. Troubleshooting issues can take some time to resolve, so we *strongly* encourage you to test out Zoom with your device ahead of time.

My video/camera isn't working.

In some cases, your device may have a privacy or permissions feature that prevents Zoom from accessing your camera. Check your settings and allow Zoom permission to access your camera.

» FURTHER READING Zoom article on video/camera troubleshooting; Windows 10 privacy feature; Using Zoom with Mac OS

I can't hear the instructor.

Did you click on **Join With Computer Audio** when you first joined the meeting? If not, and if that setting is not already your default, click on the arrow next to the microphone icon on the bottom left corner of the meeting screen to select that option. You may also need to check your permissions and allow Zoom access to your microphone. If you are using iOS or Android, tap on the headphones icon at the bottom left corner, and select either **Call using internet audio** (iOS) or **Call over internet** (Android). It's also possible that the volume control on your device had previously been turned off or lowered.

I keep hearing an echo.

Are you using multiple devices to participate in the Zoom course? Make sure only one of those devices has audio turned on.

» FURTHER READING Zoom article on audio echo in a meeting.

I can't see polling questions.

If you are using the Zoom Desktop Client, ensure you have downloaded the most up-to-date version. Previously, polling also did not work when the web browser version of Zoom was used – this issue has been resolved by Zoom.

» FURTHER READING Zoom article on keeping up to date and how to update your Zoom client.

I want to dial in instead of using computer audio – how do I do this?

When you first join the meeting you may notice a pop-up window with audio conference options. Click on the Phone Call tab to see the list of dial options (toll-free number included). If you do not initially see this pop-up, click on the arrow next to the microphone icon on the bottom left corner, and select Switch to Phone Audio and you will get the pop-up window with dial options. Visit our website to watch a quick video tutorial on how to use some Zoom features.

How to Use Zoom Features

7 Helpful Tips for Attending Live PD Webinars

1. Do a test meeting prior to the webinar. Test your audio and check audio output and input.
2. Participate by typing comments and questions in the Chat window. Some webinars encourage verbal discussions so will require a microphone. If your device does not have one, you can dial in by phone.
3. Ensure you have access to your online account prior to the day of the webinar to ensure there is enough time to troubleshoot any login issues.
4. Join the webinar a few minutes ahead of the scheduled start time. A brief introduction on logistics and attendance will be provided promptly at the start.
5. If you experience lagging video/audio, close other unnecessary programs, check your internet connection, or try logging out and rejoining the session.
6. Use Zoom shortcuts to easily mute/unmute your mic, or turn your camera on/off.
7. Use the Zoom Reaction feature for non-verbal communication to increase interactivity.

Paperless Seminar Materials & Online Services

Frequently Asked Questions

What are the benefits of paperless seminar materials?

We launched our paperless initiative in February 2019 to:

- offer seminar materials that are conveniently accessible, downloadable in PDF, and easily searchable;
- provide registrants the flexibility and portability of storing seminar materials either before, during, or after the seminar;
- provide more dynamic opportunities in handling content updates, while also decreasing wastage by no longer having to dispose of out-of-date printed materials;
- conserve printing and paper resources; and
- fall in line with CPA PD programs across the country that have adopted paperless materials for their membership.

Are all seminar materials going to be paperless?

With the exception of Executive Programs, all seminar materials are now paperless. While a print option was previously available for select seminars, this option has been discontinued in light of COVID-19 to reduce the number of touchpoints.

Do all seminar materials have a print option?

No, we no longer offer a print option.

How do I access my paperless course materials?

Your paperless course materials will be available on CPABC's new Learning Management System – the MyLearn platform. Login to your CPABC Online Services account, go to the Professional Development tab (green bar at the top) then Your Seminars and Materials (menu on the right). In the Upcoming Seminars tab, navigate to your course, then click on "Access your course/material on the MyLearn platform". This will launch your learner page on MyLearn, where you can click on the relevant course, and download PDF materials.

When will the files be available for download and how long will I have access to download the files?

You will have access to the course materials two business days prior to the seminar start date and for up to 30 days after the seminar date. Please download the materials to your own computer or device before the 30 days expire.

What type of files will I have to download?

In most cases, your paperless course materials will be in PDF format; some may contain Word and/or Excel files.

Can I access course materials on a mobile phone or tablet?

If you are able to download and read PDFs and other files onto your tablet or iPad, then you should be able to access course materials with those devices. However, certain features may not work as well, depending on which applications you are using. We do not recommend using a mobile phone to review course materials.

Can I edit or make notes on the electronic materials?

Our PDF files are password protected, so while you will not be able to edit course material content, you will be able to annotate and make comments. Visit our website for tips on how to annotate PDF files.

Discounted Pricing for the Spring/Summer Program

Although the COVID-19 pandemic has affected our working and learning environments in many ways, there is still an ongoing need for professional development. To help keep PD courses accessible, CPABC has continued adjusted pricing for the spring/summer program. Visit pd.bccpa.ca for more information and updates on discounted pricing.

20% OFF

Individual PD seminars

A 20% discount will be applied to in-person courses, live webinars, and select on-demand virtual products dated through **August 31, 2022.** Some CPABC PD products may be excluded from this offer.

10% OFF

PD Passports

A 10% discount will be applied to all 2021-2022 PD Passports purchased. The PD Passport program is a savings program for individuals who plan to take multiple CPABC PD seminars throughout the year. Depending on the type of passport chosen, PD Passport holders are entitled to 30-60 credits that can be applied toward passport-eligible seminars.

» **WATCH** Visit our website for tips & videos

- How to Use Zoom Features
- How to Annotate on Paperless Material

Registration & Payment

Confirmation of Registration

A confirmation of registration will be emailed to the registrant no later than one business day upon receipt of registration. If you do not receive your confirmation prior to the course date, please contact the PD Department at pdreg@bccpa.ca. The confirmation notice is provided as a courtesy - all assessments apply whether or not a registrant receives a confirmation notice.

Seminar Venues & Dates

Seminar venues for in-person offerings and seminar dates for all offerings are subject to change. Every effort is made to ensure that current information is available. Please check the PD website for the latest information on the status of seminars.

Registration Cancellations, Transfers & Refunds

In light of COVID-19 and the many uncertainties it presents, CPABC will be waiving our $25 and $50 cancellation fee on registrations to CPABC PD seminars held through to August 31, 2022. This only applies to emailed cancellation requests received before 7:00AM two business days prior to the seminar start date. Cancellations will not be accepted after this time, and full course fees, or full passport credits, will apply.

If a registrant falls ill, requiring them to cancel after 7:00AM two business days prior to the seminar date, accommodations may be made to provide access to attend a future offering of the same course (if available) at the earliest availability – the substituted course may be in-person or on-demand depending upon what is available at the time. Note that a $50 administrative fee will apply in such cases.

CPABC incurs overhead costs that cannot be avoided unless cancellations are received in advance of the deadlines. If cancellations are received after the deadline, fees to cover these costs will apply.

All cancellations and/or transfers must be received in writing. Telephone notifications will not be accepted. Registrants who do not show up for a seminar, and/or who do not notify CPABC PD in writing at least two full business days prior to the seminar date (statutory holidays are not considered business days) will be assessed the full cost of the seminar. There will be no refunds or credits in this case.

Substitution of attendee is permitted up to and including the day of the seminar (with the exception of Personal Passport registrations, where substitutions of attendees are not permissible under any circumstance). Special terms and conditions apply to CPABC Executive Programs.

Seminar Cancellations by CPABC

CPABC PD may have to postpone or cancel seminars due to insufficient enrolment, in which case our liability will be limited to a refund of the registration fee. In the case of a PD Passport registration, our liability will be limited to restoring the PD Passport day used to register for the seminar – under no circumstances will the PD Passport fee itself be refunded, credited, or carried forward. Registrants will be notified by email one week prior to the seminar date if a seminar is cancelled. Members are urged to register early to ensure adequate enrolment.

Seminar Leader Substitution

In the event of unforeseen scheduling issues, we reserve the right to substitute a fully qualified speaker who is not listed in the course description.

Meals for In-Person Seminars

Unless otherwise stated, lunch and coffee breaks are provided at full-day seminars, and only coffee breaks (not lunch) are provided for half-day seminars. Pastries will be provided at seminars that begin in the morning, except for free PD sessions. If you have allergies or special meal considerations, please let us know at the time of registration.

E-Learning and Online On-Demand Seminars

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

Flexi PD Passport Registrations

Note that individuals using the Flexi PD Passport are providing consent to share that registration information with the “principal holder” (or official passport contact person) of that Flexi PD Passport.

Audio/Video Recording & Photography

CPABC may occasionally audio/video record sessions, or take photographs at seminars. Recordings and images may be edited and distributed in various publications, including social media, as well as educational products. If you have any concerns, please email the PD Department at pdreg@bccpa.ca.

Payment of seminar fees are due at the time of registration, as we do not invoice for seminar registrations. We accept Visa and Mastercard but please do not include your credit card information in any email correspondence. Cheques should be made payable to CPABC. All registrations are subject to GST regardless of employer or employment status.

Please note that by registering for CPABC PD seminars, webinars, programs, and on-demand learning, the registrant agrees to:

The Terms & Conditions specified above.

Have their name listed on class lists (not applicable to on-demand learning).

Have their personal information including learning activities associated with the course collected and recorded under the authority of the Freedom and Information and Protection of Privacy Act s.26 (c) and (e), for the purposes of facilitating the delivery of the course; tracking CPD hours and course progress; customizing and improving the user experience; and in accordance with CPABC’s Privacy Statement. In order to provide the registrant with an optimal learning experience, the Chartered Professional Accountants of BC (CPABC) uses the “Docebo” learning management system. While CPABC has made arrangements for the registrant’s personal information to be hosted by Docebo in Canada, Docebo may use sub-processors located outside of Canada with access to that personal information to assist in providing its services. By registering for this course, the registrant consents to such access.

Should you have any questions about the collection, use or disclosure of your personal information, please contact: Learning Management System Administrator at CPABC, 800-555 Hastings Street, Vancouver, BC V6B 4N6 or 1.604.872.7222 or toll-free at 1.800.663.2677 or send an email to pdreg@bccpa.ca.

Did You Know?

The **BC Employer Training Grant** program is designed to assist employers in providing skills training to new or current employees that will develop skills and certification, upgrade skills needed due to automation, and enhance productivity.

The maximum an employer can receive per fiscal year (April 1st – March 31st) is **$300,000 in total government funding.**

Learn more at **pd.bccpa.ca**

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