

Professional
Development
LIFELONG LEARNING



Spring/Summer 2023

Fueling your lifelong learning journey

In our previous catalogue, we talked about how lifelong learning is akin to a journey that leads to new roads. No matter how short or long that expedition may be, or how straight or winding the paths you encounter, fuel is required to propel you forward. And here at CPABC PD, we want to be that resource for you.

We believe continuing professional education can help members grow personally and professionally, and we are committed to providing knowledge, ideas, and skills to help members realize their career goals. For those new to our program, it features a good balance between technical competencies – accounting, assurance, financial reporting, taxation, and finance – as well as enabling competencies such as communication, strategy, leadership, and self-management.

To help ensure that learning opportunities are accessible to all members, we also offered six free live webinars, totaling 10 CPD hours between April 2022 and March 2023. These were attended by approximately 5,000 members, and were also recorded and made available on-demand.

Based on the last six months, we continue to see a heavy appetite for seminars held virtually, so will offer the majority of live courses through online learning platforms.

We would like to thank our committed and talented instructors who continue to be an integral part of our program (meet some of them on page 9 and 10) and we would like to thank you for letting us partner with you in your lifelong learning journey.

Your CPABC Professional Development Team

Your Spring/Summer 2023 PD Program

YOU CAN SELECT FROM

230+
LIVE SEMINARS

210+
Online Virtual

20+
In-Person

410+
On-Demand Seminars

450+
Seminar Titles

QUALITY LEARNING OPPORTUNITIES

4.27/5

Average Course Rating in 2022

5/5

Highest Course Rating in 2022

FEEDBACK BASED ON

627
seminar offerings

20,946
registrations



70 | PD Passports



82 | Certificate Programs



91 | In-House Presentations

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PD Nexus Days

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Certificate Programs

Certificate programs are a group of seminars that allow participants to acquire substantive knowledge in specific core business topics 82

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NEW Income Tax Series & Indirect Tax Series

The world of tax is constantly changing. These two series comprise bite-sized taxation seminars that will provide updates on current announcements and other hot topics in tax once per month. Sign up to stay up to date and receive highlights of what you need to know as proposed tax rule changes are enacted.

CPABC PD introduced the first Hot Topics in Tax Series last fall, and based on favourable reviews, we are presenting Income Tax Series and Indirect Tax Series this season. Choose the series that best meets your needs!

What each include:

- Monthly 1.5 hour seminars from April to August
- Topics will be based on noteworthy developments in the world of income tax and indirect tax
- Seminars will complement other PD tax courses by providing short highlights, augmenting what is covered by our more in-depth courses.



NEW Managing for High Performance Certificate Program

Organizations live or die on the quality of their managers and this is never more the case during today's post-pandemic seismic shift in the employer/employee relationship.

Gallup has conducted more than three million studies on organizational performance over the past 30 years. Their research definitively concludes that only one in 10 qualifies as a "high-performance manager."

CPABC PD is pleased to present this new certificate program which will enable participants to reach that next level in their leadership development journey.

Read more on page [83](#).

» **READ MORE** More details on these programs will be available in the near future on our website at pd.bccpa.ca



NEW Titles for Spring/Summer 2023

- An Introduction to Facilitating Difficult Discussions
- Artificial Intelligence for Accounting and Finance Professionals
- Attracting and Retaining Talent in a Post-Pandemic World
- ChatGPT and Generative AI for Accountants
- Data Analytics for Accountants and Auditors
- Digital Transformation Toolbox
- Ethical Reasoning in a World of Differing Perspectives
- Giving and Receiving Effective Feedback
- Managing a Multicultural Workforce
- The Neuroscience of Resistance to Change
- Personal and Corporate Reputation in the Era of "Shares" and "Likes"
- Understanding the Human Condition

» **READ MORE** Learn more, save more. See page [70-71](#) for how you can save money by purchasing a PD Passport.

Virtual Presentation Design and Delivery Certificate Program

For the foreseeable future, delivering virtual presentations to internal and external audiences will be a critical professional skill. Demonstrate to your organization, clients, potential employers, and other key stakeholders that you have what it takes to design and deliver engaging and effective professional virtual presentations. See page [84](#) for further details.

Looking for a new ethics course?

Attend our new ethics seminars, *Ethical Reasoning in a World of Differing Perspectives* or *Personal and Corporate Reputation in the Era of "Shares" and "Likes"*.

Introducing

We are happy to announce the additions of Michael Morrison, CPA, CMA, executive director, general support services at Vancouver Island Health Authority, and Simon Philp, FCPA, FCMA, market vice president at CIBC, to our Certificate Program Faculty. Simon and Michael recently joined Mia Maki as facilitators in the Strategic and Advanced Strategic Management Certificate Programs.

Summer delivery of two value-packed PD Nexus Days!



IN-PERSON | HYATT REGENCY VANCOUVER
Business & Leadership INSIGHTS

Our 2023 Nexus season will kick off with the popular Business & Leadership Insights on July 11. Featuring keynotes by David Williams of the Business Council of BC on our economic outlook, and Dr. Shahana Alibhai on employing emotional literacy to understand mental health, this value-packed day will also offer three breakout streams for attendees to choose from.

VIRTUAL | LIVE
Information Technology INSIGHTS

Keep up to date with the latest technologies at this popular conference on July 25 and 26. Discover practical tips and listen to interesting stories from the tech world, as you gather all the important updates over the past year. Registrants will have the opportunity to register for a single-day option or both days. You don't want to miss this one!



On-Demand Learning Opportunities

Our inventory of on-demand learning is growing all the time. Browse our e-learning page on the website to learn about our vendor partners and titles offered this spring/summer.



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

» **READ MORE** About our Spring/Summer Nexus Days offerings on page [72-74](#).



Lifelong learning – replenish your CPA toolkit with new opportunities

Here are some opportunities for a skills and knowledge refresh that we think our members can benefit from. All course titles mentioned below are available in our spring/summer program, and in the past year received average course ratings of 4.75 or higher out of a possible 5!

Inspiring your team

In your journey to becoming an effective and respected leader, don't underestimate the power of mentoring skills – the ability to turn compliance into commitment, and potential into growth. Your inspired leadership can make a great impact on the success of your business unit, creating a positive environment where teams work together to produce desired results. Discover the tools you need to achieve inspirational leadership through mentoring, and join Dr. Shawn Ireland during his presentation of [Leadership and Coaching](#) this June. Or if your focus is on how to drive a higher degree of engagement, empowerment, and providing meaningful feedback, attend [Effective and Essential Management Skills](#) delivered by Greg Campeau in August.

Upping your digital marketing game

While few roles require direct or hands-on expertise in social marketing, all effective business professionals these days should possess a grasp on how various digital marketing platforms may, or may not, be able to help expand your customer base, attract better talent to the organization, or amplify the organization's presence. This is knowledge that will help you stay relevant in 2023 and beyond. Find and use digital marketing tools that are relevant to your work and company, and build a simple digital marketing plan with Corinne Impey at [Digital Marketing Essentials for Accountants](#).

Creating quality visuals to communicate your numbers

As a CPA, you are adept at building large spreadsheets and presenting financial information on slides and reports. But are they designed clearly enough so that your numbers and their underlying messages are clearly communicated to your audience?



Quite often, decision-makers do not take any action when they are unsure of the message, so don't let your hard work result in an undesired outcome simply because of a confusing visual. Learn how to select the appropriate visual for your purpose, and create clear, effective graphs and diagrams in Excel or PowerPoint. Be sure to hear directly from instructor Dave Paradi as he presents [Hands-on Techniques to Create Effective Financial Visuals in Excel and PowerPoint](#).

Finding your focus amidst a sea of distractions

There's no way around it, we live in a world full of distractions where competing priorities seem to grow and shift each year as we continually face new realities. As a business professional, it is imperative that you maintain a clear mind to be productive, creative, and accurate, while ensuring that your mental wellbeing is not compromised. Explore the neuroscience related to focus and the practical tools to hone it with Scott Orth this July at [The Focused CPA - Finding and Maintaining Focus in the Age of Distraction](#).

Guiding your way – or your clients' way – to retirement

You may be approaching retirement, or simply want more guidance on retirement planning in order to advise clients, family or even yourself. Now more than ever, it's obvious that creating a worry-free cash flow to pay for our lifestyles in retirement is highly daunting. In the fast-paced webinar [Designing Retirement Income](#), Kurt Rosentreter will address retirement cash flow considerations on retirement age, CPP, RRIF, income splitting, tax planning, estate factors, insurance, and real estate.

Upgrading your data analysis skills with Excel

You may be a regular Excel user, but did you know that the new features introduced with Excel 365 contain some of the biggest changes to Excel's core functionality in decades? Are you still using Excel in the most efficient and accurate way for data analysis? Learn about these changes, functions, and integrating old tools with new functionalities at [Excel 365: Advanced Data Analysis](#) presented by the Marquee Group in late June. You may also benefit from attending these additional [Excel seminars](#) coming up between May to August.

Leveling up your understanding of financial statement and ratio analysis

Most financial professionals have been exposed to ratio analysis but few are familiar with how ratios are used by external users of financial statements. If you are a financial professional who would like to take your understanding of ratio analysis to the next level, or are in the early to middle stages of your accounting career, you may want to explore some of the reports that popular systems, such as Bloomberg reports, generate for external users of financial statements. Join Karine Benzacar at [Taking Financial Statement and Ratio Analysis to the Next Level](#) where she looks at analyzing financial statements using a few different methods.

Assessing ethical decisions and their link to professional and personal success

While it may be obvious why working ethically is simply "the right thing" to do, its broader positive and negative implications to your company, industry, and even country may be a little less perceptible. Listen directly to Joel Shapiro at [Professional Ethics for Career and Life Success – Good for Business and the Right Thing to Do](#) as he discusses using the framework for auditing decisions for ethicality, as well as the relationship between ethics, the CPA Code, and the law.

Brushing up on your tax and accounting standards knowledge

You can also get more up-to-date on taxation topics such as [Corporate Restructuring – Fundamentals](#) and Personal Tax – Review of Tax Planning, or on financial reporting topics such as [IFRS – Review of the Standards](#). Browse all live [taxation seminars](#) or [accounting and assurance seminars](#) scheduled this spring and summer. ■

Meet some of *your* great instructors!



FRED TANG, CPA, CA, CBV, is principal, valuation and advisory services at Davidson & Company LLP. Fred is an experienced valuation and financial advisory professional providing services in business and securities valuations, M&A and divestitures, transaction support, financial reporting, due diligence services and litigation support. He is qualified as an expert witness and has provided expert testimony in the Supreme Court of British Columbia.

Fred will be instructing seminars on [Fundamental](#) and [Advanced Business Valuations](#) and [Purchase Price Allocation](#).



MORGAN HAMEL, MA, is the president of MH Partners Inc., a boutique consulting firm adept at helping leaders appreciate and communicate moral nuance to build stakeholder trust and long-term value.

With experience in corporate ethics, academia, and ethical entrepreneurship, Morgan offers clients a business-focused, ethics-rooted perspective on reputation management that doesn't exist elsewhere.

Morgan will be facilitating [Becoming an Ethical Leader](#) and [Shades of Grey: Ethics in the Workplace](#).



SHARON EDWARDS has worked with clients to share their expertise with confidence for 18 years. She is a presentation coach, facilitator, and writer who supports the innovation and creativity of clients by teaching intentional communication skills. An award-winning journalism career inspired her drive to share these skills to enhance career development for managers and executives. Sharon will help you strengthen your confidence, presence, and influence.

Attend the seminar [Communicating with Influence](#) to hear from Sharon directly.

Listen to our  [podcast](#) episode with Sharon on communicating with influence.



KURT ROSENTRETER, CPA, CA, CFP, CLU, TEP, FCSI, is one of Canada's most established wealth management experts. He is president of Upper Canada Capital and the past co-founder of the national wealth management practice at one of Canada's "Big Four" CPA firms. Kurt has authored seven books on money and he is a regular go-to expert in the nation's media.

Hear from Kurt live at upcoming [wealth management seminars](#).

Read Kurt's article [Building an Investment Portfolio to Match Life Goals](#).

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



CHRIS WYMAN, CPA, CMA, is the president of Pathfinder Business Consulting. Prior to starting his own company, he was the vice president of learning and development for a Canadian-based training firm. Chris shares his extensive experience in financial statement analysis, internal audit, and business process management when delivering his workshops.

Get Chris' insights at [Budgeting & Financial Management](#), [Financial Modeling in Excel](#), [Becoming a Skilled Negotiator](#), and [Managing My People](#).

Read Chris' article, [How Emotions Can Impact our Financial Decisions](#).



SHANNON WONG, CPA, is a faculty member at the British Columbia Institute of Technology where she teaches in the Accounting Diploma Program. She is also a visiting lecturer in the Beedie School of Business at Simon Fraser University and is also involved with teaching and course development for the CPA Professional Education Program. Shannon has also worked at KPMG where she held several roles in assurance, tax, and training and development.

Shannon will be instructing the course [Audit Engagements - Audit of a Simple Entity](#) this June.



GEOFFREY HOWARD, LL.B., is the founder and principal of Howard Employment Law. He provides strategic and practical advice on employment and labour law and represents clients in employment-related litigation. Geoff has extensive experience representing both employers and employees in all aspects of the employment relationship, including employment agreements, employment policies, compliance with employment legislation such as the Employment Standards Act and Human Rights Code and termination of employment.

Hear from Geoff directly at his upcoming seminars [Employment Standards Overview](#) and [Handling Termination of Employment](#).



DR. SHAHANA ALIBHAI is a professional speaker, family physician and mental health expert. She has worked with a multitude of organizations to help people gain more clarity into their own mental health. Her insights are highly sought after and she has been featured in multiple major media including CTV and Global. She is best known for her "Emotional Literacy for Better Mental Health" TEDx talk and as a panelist at International Women's Day.

Hear from Dr. Alibhai live at [PD Nexus: Business & Leadership Insights](#) on July 11th at the Hyatt Regency Vancouver.

Watch her [TEDx talk](#) on Emotional Literacy for Better Mental Health.

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.



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.



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
Financial Reporting
Management Accounting
ETHICS
FINANCE & ECONOMICS
Business Valuations
Corporate Finance
Financial Modelling
PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT
Communication & Negotiation
Creative Thinking & Decision-Making
Self-Management & Wellness
Teamwork & Leadership
Managing For High Performance Certificate Program
Resilient & Advanced Resilient Leadership Certificate Programs
PUBLIC PRACTICE MANAGEMENT
STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE
Risk Management & Fraud
Strategy, Governance & Human Resource
Strategic & Advanced Strategic Management Certificate Programs
TAXATION
Commodity Tax - Indirect Tax Series
Corporate & Personal Tax
Income Tax Series
Not-For-Profit Organizations
Trusts & Estates
US & International Tax
TECHNOLOGY & INNOVATION
Business Transformation & Emerging Issues
Software & Tools
WEALTH MANAGEMENT
PD NEXUS DAYS

ACCOUNTING & ASSURANCE

AUDIT & ASSURANCE

Audit Engagements – Application of CAS 315 Revised Standard	May-25	9am-5pm	Live Webinar
	Jul-17	9am-5pm	Live Webinar

This course reviews the revisions to CAS 315, Identifying and Assessing the Risks of Material Misstatement. The revisions require a more robust risk identification and assessment process to promote improved responses to identified risks.

This course provides participants with guidance on the practical application of some of the key revisions in the standard.

*Available Online
On-demand*

Audit Engagements – Audit of a Simple Entity	Jun-23	9am-5pm	Live Webinar
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It can be challenging to understand how to apply certain Canadian Auditing Standards (CAS) to a simple entity in an efficient and effective manner. This seminar will help auditors to better understand and apply CAS requirements in this context. Key concepts of CAS and their application will be reviewed, taking into consideration unique characteristics of a simple entity.

*Available Online
On-demand*

» **LEARN MORE** about instructor Shannon Wong on page [10](#).

Audit Engagements – Overview of CAS 315 Revised Standard	May-29	9am-12:30pm	Live Webinar
	Jul-25	9am-12:30pm	Live Webinar

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, 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 15 in their practice.

*Available Online
On-demand*

<p>ACCOUNTING & ASSURANCE Audit & Assurance Financial Reporting Management Accounting</p> <p>ETHICS</p> <p>FINANCE & ECONOMICS Business Valuations Corporate Finance Financial Modelling</p> <p>PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT Communication & Negotiation Creative Thinking & Decision-Making Self-Management & Wellness Teamwork & Leadership Managing For High Performance Certificate Program Resilient & Advanced Resilient Leadership Certificate Programs</p> <p>PUBLIC PRACTICE MANAGEMENT</p> <p>STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE Risk Management & Fraud Strategy, Governance & Human Resource Strategic & Advanced Strategic Management Certificate Programs</p> <p>TAXATION Commodity Tax - Indirect Tax Series Corporate & Personal Tax Income Tax Series Not-For-Profit Organizations Trusts & Estates US & International Tax</p> <p>TECHNOLOGY & INNOVATION Business Transformation & Emerging Issues Software & Tools</p> <p>WEALTH MANAGEMENT</p> <p>PD NEXUS DAYS</p>	<p>Audit Engagements - Review of the Standards</p> <p>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.</p>	<p>Two Segments Jun-12 & Jun-13</p> <p><i>Available Online On-demand</i></p>	<p>9am-5pm</p>	<p>Live Webinar</p>
	<p>Compilation Engagements - Application of CSRS 4200 New Standard</p> <p>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 of the previous standard to other non-assurance standards.</p>	<p>Jun-08 Jul-19 Aug-24</p> <p><i>Available Online On-demand</i></p>	<p>9am-12:30pm 9am-12:30pm 9am-12:30pm</p>	<p>Live Webinar In-person, Vancouver Live Webinar</p>
	<p>Quality Management - Application of CSQM 1 and 2 for Providers of Assurance Services (New Standards)</p> <p>The Canadian Standards for Quality Control (CSQC1) have been replaced by the Canadian Standard for Quality Management (CSQM1 and CSQM2) and related amendments to relevant assurance standards. This session will provide participants with a brief overview of the new requirements along with examples of common quality control objectives, risks and responses for small to mid-size firms, and opportunities to tailor these to their firm's specific circumstances.</p>	<p>Jun-09</p> <p><i>Available Online On-demand</i></p>	<p>9am-12:30pm</p>	<p>Live Webinar</p>

SEMINAR SCHEDULE CATEGORY & TITLE

ACCOUNTING & ASSURANCE Audit & Assurance Financial Reporting Management Accounting ETHICS FINANCE & ECONOMICS Business Valuations Corporate Finance Financial Modelling PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT Communication & Negotiation Creative Thinking & Decision-Making Self-Management & Wellness Teamwork & Leadership Managing For High Performance Certificate Program Resilient & Advanced Resilient Leadership Certificate Programs PUBLIC PRACTICE MANAGEMENT STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE Risk Management & Fraud Strategy, Governance & Human Resource Strategic & Advanced Strategic Management Certificate Programs TAXATION Commodity Tax - Indirect Tax Series Corporate & Personal Tax Income Tax Series Not-For-Profit Organizations Trusts & Estates US & International Tax TECHNOLOGY & INNOVATION Business Transformation & Emerging Issues Software & Tools WEALTH MANAGEMENT PD NEXUS DAYS	Quality Management - Overview of CSQM1 and 2 for Providers of Assurance Services (New Standards) This course reviews the requirements of the new Canadian Standard for Quality Management (CSQM1 and CSQM2) and related amendments to Canadian Auditing Standards (CAS 220) and its impact on 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.	Jun-28 <i>Available Online</i> <i>On-demand</i>	9am-12:30pm	In-person, Vancouver
	Quality Management - Overview of CSQM1 and 2 for Providers of Non-Assurance Services (New Standards) This course provides participants with an overview of the requirements of the newly issued Canadian Standard for Quality Management (CSQM1 and CSQM2) and its impact on quality control processes for non-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.	Jul-05 Aug-18 <i>Available Online</i> <i>On-demand</i>	9am-12:30pm 9am-12:30pm	Live Webinar Live Webinar
» DIDN'T FIND A SEMINAR? Other Audit & Assurance titles may be available on-demand .				

ACCOUNTING & ASSURANCE	FINANCIAL REPORTING								
Audit & Assurance Financial Reporting Management Accounting	ETHICS	FINANCE & ECONOMICS	PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT	PUBLIC PRACTICE MANAGEMENT	STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE	TAXATION	TECHNOLOGY & INNOVATION	WEALTH MANAGEMENT	PD NEXUS DAYS
Business Valuations Corporate Finance Financial Modelling	Communication & Negotiation Creative Thinking & Decision-Making Self-Management & Wellness Teamwork & Leadership Managing For High Performance Certificate Program Resilient & Advanced Resilient Leadership Certificate Programs	Risk Management & Fraud Strategy, Governance & Human Resource Strategic & Advanced Strategic Management Certificate Programs	Commodity Tax - Indirect Tax Series Corporate & Personal Tax Income Tax Series Not-For-Profit Organizations Trusts & Estates US & International Tax	Business Transformation & Emerging Issues Software & Tools	Wealth Management	PD Nexus Days			
FINANCIAL REPORTING									
		ASNFPPO - Disclosure and Presentation	Jun-23	9am-5pm	Live Webinar				
		This seminar will serve as a review and refresher of the disclosure and presentation requirements of Accounting Standards for Not-for-Profit Organizations (ASNFPPO) 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.	<i>Available Online On-demand</i>						
		ASNFPPO - Review of the Standards	Jun-07	9am-5pm	Live Webinar				
		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 (ASNFPPO) 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.	<i>Available Online On-demand</i>						
		ASPE - Agriculture (3041) New Standard	Jun-26	9am-12:30pm	Live Webinar				
		This seminar offers a detailed review and analysis of the new Canadian ASPE accounting standard for agriculture (3041) as it applies to the unique characteristics of agricultural inventories and productive biological assets. The seminar will provide practical examples and guidance regarding the recognition and measurement of these agricultural assets.	<i>Available Online On-demand</i>						

SEMINAR SCHEDULE CATEGORY & TITLE

Category	Title	Date	Time	Format	
ACCOUNTING & ASSURANCE Audit & Assurance Financial Reporting Management Accounting ETHICS FINANCE & ECONOMICS Business Valuations Corporate Finance Financial Modelling PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT Communication & Negotiation Creative Thinking & Decision-Making Self-Management & Wellness Teamwork & Leadership Managing For High Performance Certificate Program Resilient & Advanced Resilient Leadership Certificate Programs PUBLIC PRACTICE MANAGEMENT STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE Risk Management & Fraud Strategy, Governance & Human Resource Strategic & Advanced Strategic Management Certificate Programs TAXATION Commodity Tax - Indirect Tax Series Corporate & Personal Tax Income Tax Series Not-For-Profit Organizations Trusts & Estates US & International Tax TECHNOLOGY & INNOVATION Business Transformation & Emerging Issues Software & Tools WEALTH MANAGEMENT PD NEXUS DAYS	ASPE - Construction Industry This seminar is designed to enable the practical application of the Part II - Accounting Standards for Private Enterprises (ASPE) that are applicable to the construction industry. Emphasis will be placed on the application of revenue recognition and other accounting policies using specific scenarios and practical illustrative examples. The seminar covers the disclosure requirements and other issues specific to construction contracts.	Jun-29	9am-12:30pm	Live Webinar	
		Available Online On-demand			
		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 Jul-24 & Jul-25	9am-12:30pm	Live Webinar
		Available Online On-demand			
	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 Aug-10 & Aug-11	8:30am-12:30pm	Live Webinar	
	Available Online On-demand				
	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 Aug-03 & Aug-04	8:30am-5pm	Live Webinar	
	Available Online On-demand				

ACCOUNTING & ASSURANCE	IFRS – Disclosure and Presentation	Three Segments	9am-12:30pm	Live Webinar
Audit & Assurance	<p>This seminar provides a review of Part I – International Financial Reporting Standards (IFRS) pertaining to the disclosure and financial statement presentation standards. It will highlight the work of standards setters to streamline presentation and disclosure and the use of non-GAAP disclosures. The seminar covers areas of disclosure that users and security commissions have found deficient and provides insight to assist participants in writing clear, concise disclosure notes and preparing financial statements that are consistent with IFRS requirements.</p>	Jun-20, Jun-21 & Jun-22		
Financial Reporting		<i>Available Online On-demand</i>		
Management Accounting	IFRS – Review of the Standards	Four Segments	9am-12:30pm	Live Webinar
ETHICS	<p>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.</p>	Jun-12, Jun-13, Jun-14 & Jun-15		
FINANCE & ECONOMICS		<i>Available Online On-demand</i>		
Business Valuations	IFRS 16 – Leases	Two Segments	9am-12:30pm	Live Webinar
Corporate Finance	<p>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.</p>	Aug-17 & Aug-18		
Financial Modelling		<i>Available Online On-demand</i>		
PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT	<p>» DIDN'T FIND A SEMINAR? Other Financial Reporting titles may be available on-demand.</p>			
Communication & Negotiation				
Creative Thinking & Decision-Making				
Self-Management & Wellness				
Teamwork & Leadership				
Managing For High Performance Certificate Program				
Resilient & Advanced Resilient Leadership Certificate Programs				
PUBLIC PRACTICE MANAGEMENT				
STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE				
Risk Management & Fraud				
Strategy, Governance & Human Resource				
Strategic & Advanced Strategic Management Certificate Programs				
TAXATION				
Commodity Tax - Indirect Tax Series				
Corporate & Personal Tax				
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MANAGEMENT ACCOUNTING

Accelerate & Optimize Financial Close & Spreadsheet Controls	Two Segments		
	Jun-20 & Jun-21	9am-12:30pm	Live Webinar
	Aug-22 & Aug-23	9am-12:30pm	Live Webinar

Gain a practical understanding of best practices in 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.

Advanced Financial Statement Analysis	May-29	9am-5pm	Live Webinar
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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.

Budgeting & Financial Management: Understanding Budgeting Variance Analysis & Forecasting	Two Segments		
	Jun-15 & Jun-16	9am-12:30pm	Live Webinar
	Aug-16	9am-5pm	In-Person, Vancouver

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.

» **LEARN MORE** about instructor Chris Wyman on page [10](#).

SEMINAR SCHEDULE CATEGORY & TITLE

ACCOUNTING & ASSURANCE Audit & Assurance Financial Reporting Management Accounting ETHICS FINANCE & ECONOMICS Business Valuations Corporate Finance Financial Modelling PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT Communication & Negotiation Creative Thinking & Decision-Making Self-Management & Wellness Teamwork & Leadership Managing For High Performance Certificate Program Resilient & Advanced Resilient Leadership Certificate Programs PUBLIC PRACTICE MANAGEMENT STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE Risk Management & Fraud Strategy, Governance & Human Resource Strategic & Advanced Strategic Management Certificate Programs TAXATION Commodity Tax - Indirect Tax Series Corporate & Personal Tax Income Tax Series Not-For-Profit Organizations Trusts & Estates US & International Tax TECHNOLOGY & INNOVATION Business Transformation & Emerging Issues Software & Tools WEALTH MANAGEMENT PD NEXUS DAYS	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 performing 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.	Two Segments Jul-17 & Jul-18 <i>Available Online On-demand</i>	9am-12:30pm	Live Webinar
	Controllership – Strategic Leadership This seminar clarifies the controller's 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 addresses the importance of emotional intelligence. Participants will be able to identify ways they can add value as strategic leaders in their organization, and will receive practical tips on how to enhance their leadership skills in their role.	Two Segments Jul-13 & Jul-14 <i>Available Online On-demand</i>	9am-12:30pm	Live Webinar
	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-26	9am-5pm	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 provide meaningful information and influence those around them.	May-25	9am-5pm	Live Webinar

SEMINAR SCHEDULE CATEGORY & TITLE

<p>ACCOUNTING & ASSURANCE Audit & Assurance Financial Reporting Management Accounting</p>	<p>Practical Tips for Controllers and CFOs</p> <p>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.</p>	May-26	9am-5pm	Live Webinar
<p>ETHICS FINANCE & ECONOMICS Business Valuations Corporate Finance Financial Modelling</p>	<p>Practical Tips for Government Accountants</p> <p>Discover many veteran tips, including numerous unconventional ones, which either apply directly, or will inspire innovative thinking through private sector experience and ideas. Tips will be illustrated through concrete examples derived from practical experience.</p>	Jun-14	9am-5pm	Live Webinar
<p>PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT Communication & Negotiation Creative Thinking & Decision-Making Self-Management & Wellness Teamwork & Leadership Managing For High Performance Certificate Program Resilient & Advanced Resilient Leadership Certificate Programs</p>	<p>Practical Tips for Not-for-Profit Financial Leaders</p> <p>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.</p>	Jun-15	9am-5pm	Live Webinar
<p>PUBLIC PRACTICE MANAGEMENT STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE Risk Management & Fraud Strategy, Governance & Human Resource Strategic & Advanced Strategic Management Certificate Programs</p>	<p>Taking Financial Statement and Ratio Analysis to the Next Level</p> <p>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.</p>	Aug-09	9am-5pm	Live Webinar
<p>TAXATION Commodity Tax - Indirect Tax Series Corporate & Personal Tax Income Tax Series Not-For-Profit Organizations Trusts & Estates US & International Tax</p>	<p>» DIDN'T FIND A SEMINAR? Other Management Accounting titles may be available on-demand.</p>			
<p>TECHNOLOGY & INNOVATION Business Transformation & Emerging Issues Software & Tools</p>				
<p>WEALTH MANAGEMENT PD NEXUS DAYS</p>				

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	ETHICS			
	A Threats and Safeguards Approach to Ethical Decision Making	Jun-19	8:30am-12:30pm	Live Webinar
		Jun-29	8:30am-12:30pm	Live Webinar
	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.	Aug-08	8:30am-12:30pm	In-Person, Vancouver
		Aug-18	8:30am-12:30pm	Live Webinar
	Becoming an Ethical Leader	Jun-08	8:30am-12:30pm	Live Webinar
	Explore the critical role that ethical leadership contributes to organizations with interactive group discussions that are based on real-life challenges leaders may face.	Jul-21	8:30am-12:30pm	In-Person, Vancouver
	Business Ethics: It Starts with You	May-24	8:30am-12:30pm	Live Webinar
	Understand and manage ethical issues in your everyday business setting. Explore how both personal and business values influence business decisions through dynamic group discussions.	Jul-11	8:30am-12:30pm	In-Person, Surrey
		Jul-18	8:30am-12:30pm	In-Person, Vancouver
		Aug-16	8:30am-12:30pm	Live Webinar
	Ethical Decision Making: Exploring the Hidden Influence of Unconscious Bias in the Conscious Mind	Jun-07	8:30am-12:30pm	Live Webinar
		Jun-23	8:30am-12:30pm	In-Person, Vancouver
	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.	Aug-14	8:30am-12:30pm	Live Webinar

SEMINAR SCHEDULE CATEGORY & TITLE

Category	Title	Date	Time	Format
ACCOUNTING & ASSURANCE Audit & Assurance Financial Reporting Management Accounting	Ethical Dilemmas	Jun-06	8:30am-12:30pm	Live Webinar
	Our expectations of how organizations should behave are no longer based purely on shareholder value or service, but include an array of social, environmental, and governance issues. In order to resolve ethical dilemmas, it is necessary to both understand the issues at hand, and have a rigorous analytical and critical thinking framework with which to examine these from an ethical perspective. This seminar will provide you with the skills to do both.	Jun-27	8:30am-12:30pm	In-Person, Vancouver
		Aug-09	8:30am-12:30pm	Live Webinar
ETHICS				
FINANCE & ECONOMICS Business Valuations Corporate Finance Financial Modelling	Ethical Leadership in an Age of AI	Jul-17	8:30am-12:30pm	Live Webinar
	CPAs have a leadership role to play in this era of disruptive technology. Advancements in artificial intelligence create strategic opportunities for organizations and raise unique ethics challenges for business leaders. Explore recent advancements in AI and how they can be expected to change CPA roles.			
		» READ instructor Laura Friedrich's article on CPAs and AI .		
PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT Communication & Negotiation Creative Thinking & Decision-Making Self-Management & Wellness Teamwork & Leadership Managing For High Performance Certificate Program Resilient & Advanced Resilient Leadership Certificate Programs	NEW Ethical Reasoning in a World of Differing Perspectives	Jun-21	8:30am-12:30pm	Live Webinar
	The personal lens through which we see the world is incredibly powerful, but it often leads to strongly biased perspectives due to its unique nature. This session will leverage neuroscience findings as we seek to understand the impact of our conscious and unconscious mind on the decisions we make every day.	Aug-23	8:30am-12:30pm	Live Webinar
PUBLIC PRACTICE MANAGEMENT STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE Risk Management & Fraud Strategy, Governance & Human Resource Strategic & Advanced Strategic Management Certificate Programs	Ethical Tax	Jul-12	8am-10am	Live Webinar
	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.			
TAXATION Commodity Tax - Indirect Tax Series Corporate & Personal Tax Income Tax Series Not-For-Profit Organizations Trusts & Estates US & International Tax				
TECHNOLOGY & INNOVATION Business Transformation & Emerging Issues Software & Tools				
WEALTH MANAGEMENT				
PD NEXUS DAYS				

SEMINAR SCHEDULE CATEGORY & TITLE

ACCOUNTING & ASSURANCE				
Audit & Assurance Financial Reporting Management Accounting	Ethics and Technology	Jun-20	8:30am-12:30pm	Live Webinar
ETHICS	Uncover ethical considerations and outcomes related to technology. Explore “technoethics” and the implications it has for individuals and organizations, pertaining to issues such as copyrights, cybercrimes, and geo-tracking technologies.			
FINANCE & ECONOMICS				
Business Valuations Corporate Finance Financial Modelling	Ethics at Our Core	Jun-28	8:30am-12:30pm	Live Webinar
PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT	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.			
Communication & Negotiation Creative Thinking & Decision-Making Self-Management & Wellness Teamwork & Leadership Managing For High Performance Certificate Program Resilient & Advanced Resilient Leadership Certificate Programs	Ethics in Professional Practice – What Canadian CPAs Need to Know	Jul-06 Jul-27	8:30am-12:30pm 8:30am-12:30pm	Live Webinar Live Webinar
PUBLIC PRACTICE MANAGEMENT	In order for a professional practice to grow and succeed, you must be proactive about ethics. Learn to deal with actual ethical dilemmas they face, regardless of the size of your practice or the role you play within the practice. Explore a step-by-step approach that will help you navigate through complex and sensitive issues that arise in any practice.			
STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE				
Risk Management & Fraud Strategy, Governance & Human Resource Strategic & Advanced Strategic Management Certificate Programs	NEW Personal and Corporate Reputation in the Era of “Shares” and “Likes”	Jun-06 Jul-13	8:30am-12:30pm 8:30am-12:30pm	Live Webinar In-Person, Victoria
TAXATION	All it takes is one look at our morning news feed to see how personal and corporate reputations can be lost in an instant. The reality is that in this era of iPhones and social media, well-meaning people can fall quickly in ways that leave personal and professional scars for years to come. Learn how key concepts from behavioural ethics can help us strengthen and protect both our personal reputations and those of our organizations.			
Commodity Tax - Indirect Tax Series Corporate & Personal Tax Income Tax Series Not-For-Profit Organizations Trusts & Estates US & International Tax	» LEARN MORE about instructor Morgan Hamel on page 9 .			
TECHNOLOGY & INNOVATION				
Business Transformation & Emerging Issues Software & Tools				
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PD NEXUS DAYS				
	Professional Ethics for Career and Life Success	May-30	8:30am-12:30pm	Live Webinar
	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.	Aug-22	8:30am-12:30pm	Live Webinar
	Shades of Grey: Ethics in the Workplace	Jun-13	1pm-5pm	Live Webinar
	Enhance your understanding of professional ethics through group case studies on everyday dilemmas and explore moral philosophy in the workplace.	Jul-21	1pm-5pm	In-Person, Vancouver
	Understanding and Embracing Ethics in the Workplace	Jun-14	8:30am-12:30pm	Live Webinar
	Learn effective techniques for ethical thinking and how to apply these tools to relevant business-based scenarios.	Jul-14	8:30am-12:30pm	Live Webinar
		Aug-18	8:30am-12:30pm	In-Person, Vancouver
	» DIDN'T FIND A SEMINAR? Other Ethics titles may be available on-demand . Other live seminars that do not fall under the Ethics category may also contain some ethics content.			

<p>ACCOUNTING & ASSURANCE Audit & Assurance Financial Reporting Management Accounting</p> <p>ETHICS</p> <p>FINANCE & ECONOMICS Business Valuations Corporate Finance Financial Modelling</p> <p>PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT Communication & Negotiation Creative Thinking & Decision-Making Self-Management & Wellness Teamwork & Leadership Managing For High Performance Certificate Program Resilient & Advanced Resilient Leadership Certificate Programs</p> <p>PUBLIC PRACTICE MANAGEMENT</p> <p>STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE Risk Management & Fraud Strategy, Governance & Human Resource Strategic & Advanced Strategic Management Certificate Programs</p> <p>TAXATION Commodity Tax - Indirect Tax Series Corporate & Personal Tax Income Tax Series Not-For-Profit Organizations Trusts & Estates US & International Tax</p> <p>TECHNOLOGY & INNOVATION Business Transformation & Emerging Issues Software & Tools</p> <p>WEALTH MANAGEMENT</p> <p>PD NEXUS DAYS</p>	<p>CORPORATE FINANCE</p>			
	<p>Cash and Treasury Management</p> <p>This seminar reviews contemporary issues in cash and treasury management including improving cash forecasts, optimizing cash flows, financial risk management, and measuring value-at-risk. Explore state-of-the-art changes in the world of cash and treasury management, exchange ideas with peers, and leave with fresh insights to improve cash management.</p>	Jun-20	9am-5pm	Live Webinar
	<p>Corporate Treasury Management</p> <p>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. 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 your organizations.</p>	Jun-19	9am-5pm	Live Webinar <i>Available Online On-demand</i>
	<p>Due Diligence for Acquisitions</p> <p>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.</p>	Two Segments Jul-04 & Jul-05	9am-12:30pm	Live Webinar <i>Available Online On-demand</i>

<p>ACCOUNTING & ASSURANCE Audit & Assurance Financial Reporting Management Accounting</p> <p>ETHICS</p>	<p>Financing Strategies</p>	<p>Two Segments</p>	<p>9am-12:30pm</p>	<p>Live Webinar</p>
<p>FINANCE & ECONOMICS Business Valuations Corporate Finance Financial Modelling</p>	<p>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. You will gain a deeper understanding of what capital providers are seeking and issues that can arise. You will also learn how companies should prepare themselves to execute a financing transaction in order to obtain financing and negotiate with capital providers.</p>	<p><i>Available Online On-demand</i></p>		
<p>PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT Communication & Negotiation Creative Thinking & Decision-Making Self-Management & Wellness Teamwork & Leadership Managing For High Performance Certificate Program Resilient & Advanced Resilient Leadership Certificate Programs</p>	<p>Treasury & Finance for Accountants</p>	<p>Aug-15</p>	<p>9am-5pm</p>	<p>Live Webinar</p>
<p>PUBLIC PRACTICE MANAGEMENT STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE Risk Management & Fraud Strategy, Governance & Human Resource Strategic & Advanced Strategic Management Certificate Programs</p>	<p>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.</p>			
<p>TAXATION Commodity Tax - Indirect Tax Series Corporate & Personal Tax Income Tax Series Not-For-Profit Organizations Trusts & Estates US & International Tax</p>	<p>» DIDN'T FIND A SEMINAR? Other Corporate Finance titles may be available on-demand.</p>			
<p>TECHNOLOGY & INNOVATION Business Transformation & Emerging Issues Software & Tools</p>				
<p>WEALTH MANAGEMENT PD NEXUS DAYS</p>				

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FINANCIAL MODELLING

Building a Model (of a Company)	Jun-15	9am-5pm	Live Webinar
<p>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.</p>			
Financial Modeling in Excel	Two Segments Jun-22 & Jun-23 Aug-17	9am-12:30pm 9am-5pm	Live Webinar In-Person, Vancouver
<p>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.</p>			

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

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PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT

COMMUNICATION & NEGOTIATION

<p>Becoming a Skilled Negotiator</p> <p>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.</p>	<p>Two Segments Jun-26 & Jun-27</p>	<p>9am-12:30pm</p>	<p>Live Webinar</p>
<p>Better Online and Hybrid Meetings</p> <p>Who says online meetings have to be painful? Discover technologies, best practices in online facilitation, and clear communication principles to run better online and hybrid meetings. Explore how to level up virtual meetings so you can better connect with your audience, have productive conversations, and save time.</p> <p>» READ instructor Corinne Impey’s article on breaking down communications breakdowns.</p>	<p>Jul-20</p>	<p>8:30am-12pm</p>	<p>Live Webinar</p>
<p>Communicating Effectively Under Pressure</p> <p>Explore situations where you may feel pressure, and learn practical strategies to manage these situations effectively.</p>	<p>Two Segments Jun-19 & Jun-20</p>	<p>9am-12:30pm</p>	<p>Live Webinar</p>
<p>Communicating with Influence</p> <p>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.</p> <p>» READ instructor Sharon Edwards’ article on this topic or listen to her podcast episode. Learn more about Sharon on page 9.</p>	<p>Two Segments Jul-20 & Jul-21</p>	<p>9am-12:30pm</p>	<p>Live Webinar</p>

SEMINAR SCHEDULE CATEGORY & TITLE

<p>ACCOUNTING & ASSURANCE Audit & Assurance Financial Reporting Management Accounting</p> <p>ETHICS</p> <p>FINANCE & ECONOMICS Business Valuations Corporate Finance Financial Modelling</p>	<p>Conflict: Changing Viewpoints and Influencing Behaviors</p> <p>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.</p>	<p>Three Segments Aug-08, Aug-09 & Aug-10</p>	<p>10am-12:30pm</p>	<p>Live Webinar</p>
<p>PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT Communication & Negotiation Creative Thinking & Decision-Making Self-Management & Wellness Teamwork & Leadership Managing For High Performance Certificate Program Resilient & Advanced Resilient Leadership Certificate Programs</p> <p>PUBLIC PRACTICE MANAGEMENT</p>	<p>Negotiation Skills</p> <p>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.</p> <p>» READ Laura Villacruis’ article on how to achieve the best negotiation outcomes or listen to her podcast episode.</p>	<p>Jul-18</p>	<p>9am-5pm</p>	<p>Live Webinar</p>
<p>STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE Risk Management & Fraud Strategy, Governance & Human Resource Strategic & Advanced Strategic Management Certificate Programs</p>	<p>Tools for Communicating with Difficult People</p> <p>Learn how to deal with your reactions to others and self-manage your own. Discover techniques to respectfully but assertively conduct difficult conversations.</p> <p>» READ instructor Pam Penner’s article on communicating with difficult people.</p>	<p>Two Segments Aug-03 & Aug-04</p>	<p>9am-12:30pm</p>	<p>Live Webinar</p>
<p>TAXATION Commodity Tax - Indirect Tax Series Corporate & Personal Tax Income Tax Series Not-For-Profit Organizations Trusts & Estates US & International Tax</p> <p>TECHNOLOGY & INNOVATION Business Transformation & Emerging Issues Software & Tools</p>	<p>Upgrade Your Public Speaking and Presentation Skills</p> <p>Be empowered with the knowledge and tools you need to present with confidence. Learn how to understand your audience, craft and deliver a compelling presentation no matter the topic, and show up in an authentic way – nerves and all. From client conversations, virtual calls or board meetings, improving your public speaking and presentation skills will serve you well for years to come.</p>	<p>Jun-13</p>	<p>8:30am-12pm</p>	<p>Live Webinar</p>
<p>WEALTH MANAGEMENT PD NEXUS DAYS</p>				

<p>ACCOUNTING & ASSURANCE Audit & Assurance Financial Reporting Management Accounting</p> <p>ETHICS</p> <p>FINANCE & ECONOMICS Business Valuations Corporate Finance Financial Modelling</p> <p>PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT Communication & Negotiation Creative Thinking & Decision-Making Self-Management & Wellness Teamwork & Leadership Managing For High Performance Certificate Program Resilient & Advanced Resilient Leadership Certificate Programs</p> <p>PUBLIC PRACTICE MANAGEMENT</p> <p>STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE Risk Management & Fraud Strategy, Governance & Human Resource Strategic & Advanced Strategic Management Certificate Programs</p> <p>TAXATION Commodity Tax - Indirect Tax Series Corporate & Personal Tax Income Tax Series Not-For-Profit Organizations Trusts & Estates US & International Tax</p> <p>TECHNOLOGY & INNOVATION Business Transformation & Emerging Issues Software & Tools</p> <p>WEALTH MANAGEMENT</p> <p>PD NEXUS DAYS</p>	<p>Virtual Presentation Design and Delivery Certificate Program</p> <p>For the foreseeable future, delivering virtual presentations to internal and external audiences will be a critical professional skill. This six-module certificate program will demonstrate to your organization, clients, potential employers, and other key stakeholders that you can design and deliver engaging and effective professional virtual presentations.</p> <p>» SEE page 84 for more details on this program and watch this short video on why you should attend</p>	<p>Six Segments Jul-06, Jul-13, Jul-20, Jul-27, Aug-03 & Aug-10</p>	<p>2pm-4pm</p>	<p>Live Webinar</p>
	<p>Write to be Read</p> <p>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.</p> <p>» READ instructor Sharon Habib’s article on How to Strengthen Your Writing Skills (and Why You Should).</p>	<p>Aug-03</p>	<p>9am-12:30pm</p>	<p>Live Webinar</p>
<p>Writing for Clarity and Impact</p> <p>When it comes to writing, we’ve all developed bad habits we would benefit from leaving behind. Explore ways to improve your written communication and unpack some of the common communication pitfalls that may be getting in the way.</p> <p>» READ instructor Corinne Impey’s article on the three Cs of effective communication</p> <p>» DIDN’T FIND A SEMINAR? Other Communication & Negotiation titles may be available on-demand.</p>	<p>May-24</p>	<p>8:30am-12pm</p>	<p>Live Webinar</p>	

<p>ACCOUNTING & ASSURANCE Audit & Assurance Financial Reporting Management Accounting</p> <p>ETHICS</p> <p>FINANCE & ECONOMICS Business Valuations Corporate Finance Financial Modelling</p> <p>PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT Communication & Negotiation</p> <p>Creative Thinking & Decision-Making</p> <p>Self-Management & Wellness Teamwork & Leadership Managing For High Performance Certificate Program Resilient & Advanced Resilient Leadership Certificate Programs</p> <p>PUBLIC PRACTICE MANAGEMENT</p> <p>STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE Risk Management & Fraud Strategy, Governance & Human Resource Strategic & Advanced Strategic Management Certificate Programs</p> <p>TAXATION Commodity Tax - Indirect Tax Series Corporate & Personal Tax Income Tax Series Not-For-Profit Organizations Trusts & Estates US & International Tax</p> <p>TECHNOLOGY & INNOVATION Business Transformation & Emerging Issues Software & Tools</p> <p>WEALTH MANAGEMENT</p> <p>PD NEXUS DAYS</p>	<p>CREATIVE THINKING & DECISION-MAKING</p> <hr/> <p>Setting Concrete Goals and Metrics Aug-15 9am-12pm Live Webinar</p> <p>Learn how to set crisp, clear, meaningful goals and metrics for everything that is really important, including both “hard” and “soft” goals, making it easier for you to discuss and manage performance, develop skills, and even core values.</p> <hr/>
	<p>SELF-MANAGEMENT & WELLNESS</p> <hr/> <p>Balancing Your Wheels Jun-12 9am-5pm In-Person, Vancouver</p> <p>Adapting to unforeseen circumstances is now a must, not just a nice to have. Apply simple tools to enhance the quality of your life. Amplify your ability to prioritize your life according to your priorities as you boldly manage all of the activity and distractions in our world today.</p> <hr/> <p>Becoming ... what you really want to be Three Segments Aug-22, Aug-23 & Aug-24 10am-12:30pm Live Webinar</p> <p>This course outlines the path and provides the motivation to follow it. We can all do remarkable things when we acquire the essential tools and understand how to navigate the daunting obstacles life can throw at us. You’ll never look back on your regrets after taking this unique, inspiring learning experience.</p> <hr/> <p>Brain Focus: The Power of Full Engagement May-30 9am-12:30pm Live Webinar</p> <p>A full-day course packed with strategies to help your productivity and improve your focus to work smarter all day long.</p> <hr/> <p>Coach Yourself First Jul-12 9am-5pm Live Webinar</p> <p>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.</p> <hr/>

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<p>ACCOUNTING & ASSURANCE Audit & Assurance Financial Reporting Management Accounting</p> <p>ETHICS</p> <p>FINANCE & ECONOMICS Business Valuations Corporate Finance Financial Modelling</p>	<p>Critical Thinking and Self Reflection</p> <p>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.</p>	Jul-20	9am-5pm	Live Webinar
<p>PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT Communication & Negotiation Creative Thinking & Decision-Making Self-Management & Wellness Teamwork & Leadership Managing For High Performance Certificate Program Resilient & Advanced Resilient Leadership Certificate Programs</p>	<p>Emotional Intelligence (EQ) - The Myths and The Mastery</p> <p>The research is crystal clear - regardless of the type of work, EQ is the cornerstone of superior performance. When star performers were analyzed the one consistent common denominator was, they had healthy EQ! The purpose of this course is to demystify EQ, help people assess their current level of EQ, and most importantly, provide proven and practical strategies on how to develop one's EQ.</p>	Jul-19	9am-12:30pm	Live Webinar
<p>PUBLIC PRACTICE MANAGEMENT</p> <p>STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE Risk Management & Fraud Strategy, Governance & Human Resource Strategic & Advanced Strategic Management Certificate Programs</p>	<p>Influence and Assertiveness</p> <p>Designed for individuals wishing to develop their influence and assertiveness to increase their impact within their organization, this highly interactive seminar will provide tools and techniques, and will help develop an action plan for the future.</p>	Jul-27	9am-5pm	Live Webinar
<p>TAXATION Commodity Tax - Indirect Tax Series Corporate & Personal Tax Income Tax Series Not-For-Profit Organizations Trusts & Estates US & International Tax</p>	<p>Personal Effectiveness: Self Awareness and Balanced Thinking</p> <p>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.</p>	Aug-22	9am-5pm	Live Webinar
<p>TECHNOLOGY & INNOVATION Business Transformation & Emerging Issues Software & Tools</p> <p>WEALTH MANAGEMENT</p> <p>PD NEXUS DAYS</p>				

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<p>ACCOUNTING & ASSURANCE Audit & Assurance Financial Reporting Management Accounting</p> <p>ETHICS</p> <p>FINANCE & ECONOMICS Business Valuations Corporate Finance Financial Modelling</p>	<p>Resiliency and Grit: Bounce Back from Adversity and Challenge</p> <p>Do you have the resiliency and grit you need to bounce back quickly from setbacks, gain strength from adversity, and model, support, and encourage those qualities in yourself, your family, and work colleagues? Through stories, exercises, and examples you will learn how to apply the thinking and take action that leads to greater ease, confidence, and effective outcomes in your life and career. Leave with actionable insights and valuable tools.</p>	<p>Jul-17</p>	<p>9am-5pm</p>	<p>Live Webinar</p>
<p>PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT Communication & Negotiation Creative Thinking & Decision-Making Self-Management & Wellness Teamwork & Leadership Managing For High Performance Certificate Program Resilient & Advanced Resilient Leadership Certificate Programs</p>	<p>Stress Management</p> <p>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.</p>	<p>Jun-22</p>	<p>9am-12:30pm</p>	<p>Live Webinar</p>
<p>PUBLIC PRACTICE MANAGEMENT</p> <p>STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE Risk Management & Fraud Strategy, Governance & Human Resource Strategic & Advanced Strategic Management Certificate Programs</p>	<p>The Focused CPA - Finding and Maintaining Focus in the Age of Distraction</p> <p>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.</p> <p>» READ instructor Scott Orth's article on thriving in a world of change.</p>	<p>Two Segments Jul-13 & Jul-20</p>	<p>9am-12:30pm</p>	<p>Live Webinar</p>
<p>TAXATION Commodity Tax - Indirect Tax Series Corporate & Personal Tax Income Tax Series Not-For-Profit Organizations Trusts & Estates US & International Tax</p> <p>TECHNOLOGY & INNOVATION Business Transformation & Emerging Issues Software & Tools</p> <p>WEALTH MANAGEMENT</p> <p>PD NEXUS DAYS</p>	<p>The Four Intelligences</p> <p>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.</p>	<p>Jul-12</p>	<p>9am-12:30pm</p>	<p>Live Webinar</p>

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<p>ACCOUNTING & ASSURANCE Audit & Assurance Financial Reporting Management Accounting</p> <p>ETHICS</p> <p>FINANCE & ECONOMICS Business Valuations Corporate Finance Financial Modelling</p>	<p>NEW The Neuroscience of Resistance to Change</p> <p>Recent neuroscience findings provide ways to better understand resistance to change at an individual level. Through interactive and hands-on activities, explore basic neuroscience insights to learn how our brains deal with and process change, then access specific neuroscience-based tools to manage individual resistance to change.</p>	<p>Jun-28</p>	<p>9am-12:30pm</p>	<p>Live Webinar</p>
<p>PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT Communication & Negotiation Creative Thinking & Decision-Making Self-Management & Wellness Teamwork & Leadership Managing For High Performance Certificate Program Resilient & Advanced Resilient Leadership Certificate Programs</p>	<p>The Power of Habit</p> <p>Now is the perfect time to reassess your habits and challenge yourself to live the life you really want. If you have been trying to make the same changes for years, it may be that you need a new approach to personal change. Discover how to find the real inspiration you need to make change and learn the success habits that build a happier, more productive life.</p>	<p>Jul-21</p>	<p>9am-5pm</p>	<p>Live Webinar</p>
<p>PUBLIC PRACTICE MANAGEMENT</p> <p>STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE Risk Management & Fraud Strategy, Governance & Human Resource Strategic & Advanced Strategic Management Certificate Programs</p>	<p>Time Management: The Essentials of Productivity Skills</p> <p>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.</p>	<p>Two Segments Jun-14 & Jun-15</p>	<p>9am-12:30pm</p>	<p>Live Webinar</p>
<p>TAXATION Commodity Tax - Indirect Tax Series Corporate & Personal Tax Income Tax Series Not-For-Profit Organizations Trusts & Estates US & International Tax</p> <p>TECHNOLOGY & INNOVATION Business Transformation & Emerging Issues Software & Tools</p>	<p>Triple Your Reading Speed</p> <p>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.</p> <p>» READ instructor Terry Small's article on reading comprehension.</p>	<p>Two Segments Jul-25 & Jul-26</p>	<p>9am-12:30pm</p>	<p>Live Webinar</p>
<p>WEALTH MANAGEMENT</p> <p>PD NEXUS DAYS</p>	<p>» DIDN'T FIND A SEMINAR? Other Self-Management & Wellness titles may be available on-demand.</p>			

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<p>ACCOUNTING & ASSURANCE Audit & Assurance Financial Reporting Management Accounting</p> <p>ETHICS</p> <p>FINANCE & ECONOMICS Business Valuations Corporate Finance Financial Modelling</p> <p>PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT Communication & Negotiation Creative Thinking & Decision-Making Self-Management & Wellness</p> <p>Teamwork & Leadership Managing For High Performance Certificate Program Resilient & Advanced Resilient Leadership Certificate Programs</p> <p>PUBLIC PRACTICE MANAGEMENT</p> <p>STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE Risk Management & Fraud Strategy, Governance & Human Resource Strategic & Advanced Strategic Management Certificate Programs</p> <p>TAXATION Commodity Tax - Indirect Tax Series Corporate & Personal Tax Income Tax Series Not-For-Profit Organizations Trusts & Estates US & International Tax</p> <p>TECHNOLOGY & INNOVATION Business Transformation & Emerging Issues Software & Tools</p> <p>WEALTH MANAGEMENT</p> <p>PD NEXUS DAYS</p>	<p>TEAMWORK & LEADERSHIP</p>				
	<p>Achieving Results Through Collaborative Projects</p> <p>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.</p>	Two Segments Jul-13 & Jul-14	9am-12:30pm	Live Webinar	
	<p>NEW An Introduction to Facilitating Difficult Conversations</p> <p>In addition to valuable time saved, effective facilitation of difficult conversations shortens the path to achieving desired outcomes, leaving behind a sense of progress and belonging. Explore proven facilitation tools and techniques through interactive and hands-on activities that will develop your facilitation skills.</p>	Aug-21	9am-12:30pm	Live Webinar	
	<p>Building and Managing Successful Business Relationships</p> <p>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. Learn how to build better business relationships, track your progress, and generate the results you want.</p>	Aug-10	9am-12:30pm	Live Webinar	
	<p>Building Your Leadership Brand</p> <p>Why would really talented people want to work really hard for you? You must 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? Learn how to build a leadership brand that is more valuable to your career and to your key stakeholders.</p>	Jul-18	9am-12:30pm	Live Webinar	

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<p>ACCOUNTING & ASSURANCE Audit & Assurance Financial Reporting Management Accounting</p> <p>ETHICS</p> <p>FINANCE & ECONOMICS Business Valuations Corporate Finance Financial Modelling</p> <p>PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT Communication & Negotiation Creative Thinking & Decision-Making Self-Management & Wellness</p> <p>Teamwork & Leadership Managing For High Performance Certificate Program Resilient & Advanced Resilient Leadership Certificate Programs</p> <p>PUBLIC PRACTICE MANAGEMENT</p> <p>STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE Risk Management & Fraud Strategy, Governance & Human Resource Strategic & Advanced Strategic Management Certificate Programs</p> <p>TAXATION Commodity Tax - Indirect Tax Series Corporate & Personal Tax Income Tax Series Not-For-Profit Organizations Trusts & Estates US & International Tax</p> <p>TECHNOLOGY & INNOVATION Business Transformation & Emerging Issues Software & Tools</p> <p>WEALTH MANAGEMENT</p> <p>PD NEXUS DAYS</p>	<p>Coaching for Executive Excellence</p> <p>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.</p>	Jun-15	9am-5pm	In-Person, Vancouver
	<p>Dispelling the Myth of “Effective Meetings”: Engaging Virtual Meetings Your Employees Will Want to Attend</p> <p>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.</p>	Aug-16	9am-12:30pm	Live Webinar
	<p>Effective & Essential Management Skills</p> <p>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.</p>	Two Segments Aug-16 & Aug-17	9am-12:30pm	Live Webinar
	<p>Employee Delegation, Engagement, and Empowerment</p> <p>Most people assume that delegation and empowerment are “all or nothing”: either I do it or you do it. But this is not the case at all. Done well, delegation drives employee engagement, empowerment, development, and retention. It helps ensure the work gets done right the first time. And it frees you up to attend to your higher-level leadership work. Explore several key practices to help you and your employees get the most out of delegating.</p>	Jul-20	9am-12:30pm	Live Webinar

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<p>ACCOUNTING & ASSURANCE Audit & Assurance Financial Reporting Management Accounting</p> <p>ETHICS</p> <p>FINANCE & ECONOMICS Business Valuations Corporate Finance Financial Modelling</p>	<p>Empowering and Engaging Others</p> <p>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.</p>	<p>Aug-15</p>	<p>9am-5pm</p>	<p>Live Webinar</p>
<p>PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT Communication & Negotiation Creative Thinking & Decision-Making Self-Management & Wellness</p> <p>Teamwork & Leadership Managing For High Performance Certificate Program Resilient & Advanced Resilient Leadership Certificate Programs</p>	<p>Entrepreneurial Accountant: Stop Managing, Start Leading</p> <p>As we emerge from a post-pandemic world and our business environment changes, it's not enough for accountants to just deliver the numbers. The accountants who will thrive are those that have learned to think beyond spreadsheets and lead with an entrepreneurial mindset. Learn how to boost your accounting career and obtain toolkits and frameworks you can immediately use with your teams.</p>	<p>May-30</p>	<p>8:30am-10:30am</p>	<p>Live Webinar</p>
<p>PUBLIC PRACTICE MANAGEMENT</p> <p>STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE Risk Management & Fraud Strategy, Governance & Human Resource Strategic & Advanced Strategic Management Certificate Programs</p> <p>TAXATION Commodity Tax - Indirect Tax Series Corporate & Personal Tax Income Tax Series Not-For-Profit Organizations Trusts & Estates US & International Tax</p> <p>TECHNOLOGY & INNOVATION Business Transformation & Emerging Issues Software & Tools</p> <p>WEALTH MANAGEMENT</p> <p>PD NEXUS DAYS</p>	<p>NEW Giving and Receiving Effective Feedback</p> <p>Communication remains a critical skill required for leaders. An essential element within our communication is the ability to give and receive effective feedback. Through interactive and hands-on activities, discover proven tools and techniques to better understand and enhance your skills in giving and receiving effective feedback. This practical approach will enable you to apply the acquired skills and knowledge across multiple scenarios, dealing with all levels of an organization.</p>	<p>Jul-10</p>	<p>9am-12:30pm</p>	<p>Live Webinar</p>

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ACCOUNTING & ASSURANCE Audit & Assurance Financial Reporting Management Accounting ETHICS FINANCE & ECONOMICS Business Valuations Corporate Finance Financial Modelling PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT Communication & Negotiation Creative Thinking & Decision-Making Self-Management & Wellness Teamwork & Leadership Managing For High Performance Certificate Program Resilient & Advanced Resilient Leadership Certificate Programs PUBLIC PRACTICE MANAGEMENT STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE Risk Management & Fraud Strategy, Governance & Human Resource Strategic & Advanced Strategic Management Certificate Programs TAXATION Commodity Tax - Indirect Tax Series Corporate & Personal Tax Income Tax Series Not-For-Profit Organizations Trusts & Estates US & International Tax TECHNOLOGY & INNOVATION Business Transformation & Emerging Issues Software & Tools WEALTH MANAGEMENT PD NEXUS DAYS	High Performing Team Member Gain an 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. » READ instructor Laura Villacruis' article on how to develop high-performance teams or listen to her podcast episode.	Jul-11	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.	Jun-08 Aug-17	9am-12:30pm 9am-5pm	Live Webinar In-Person, Vancouver
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-22 Jul-19	9am-5pm 9am-5pm	Live Webinar In-Person, Vancouver	
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.	Aug-08	9am-5pm	Live Webinar	
Managing My People Managers find it challenging to maximize their peoples' contributions 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.	Two Segments Aug-21 & Aug-22	9am-12:30pm	Live Webinar	

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<p>ACCOUNTING & ASSURANCE Audit & Assurance Financial Reporting Management Accounting</p> <p>ETHICS</p> <p>FINANCE & ECONOMICS Business Valuations Corporate Finance Financial Modelling</p>	<p>Managing Transitions: Leading the People Side of Change</p> <p>When you think about how difficult it is to change yourself, you realize how difficult it is to change someone else, not to mention a team or organization. Discover dozens of practical techniques and tools to help yourself and others prepare for, deal with, and make the most of change. Implement change more effectively to make your life a lot easier, generate much better results, and enhance your competitive edge.</p>	Jun-27	9am-12:30pm	Live Webinar
<p>PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT Communication & Negotiation Creative Thinking & Decision-Making Self-Management & Wellness</p> <p>Teamwork & Leadership Managing For High Performance Certificate Program Resilient & Advanced Resilient Leadership Certificate Programs</p>	<p>PD Nexus: Business and Leadership Insights</p> <p>The past three years have been unpredictable, and there are many new challenges on the horizon. This conference will help you “embrace the now” of this uncertainty by offering three streams of sessions on timely topics relevant to your current work and environment.</p>	Jul-18	8:30am-4:30pm	Hyatt Regency, Vancouver
<p>PUBLIC PRACTICE MANAGEMENT</p> <p>STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE Risk Management & Fraud Strategy, Governance & Human Resource Strategic & Advanced Strategic Management Certificate Programs</p>	<p>What Do People Want? Motivating Yourself and Others</p> <p>An important role of managers in the workplace is to get things done through other people. To do this they need to be able to motivate employees, but that is easier said than done! This one-day, highly interactive course provides practical tools and techniques for understanding what motivates people and how to develop and maintain a motivated workforce.</p>	Aug-17	9am-5pm	Live Webinar
<p>TAXATION Commodity Tax - Indirect Tax Series Corporate & Personal Tax Income Tax Series Not-For-Profit Organizations Trusts & Estates US & International Tax</p> <p>TECHNOLOGY & INNOVATION Business Transformation & Emerging Issues Software & Tools</p>	<p>Wiring Your Brain for High Impact Leadership</p> <p>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.</p> <p>» LISTEN to instructor Terry Small’s podcast episode on how anyone can wire their brain for leadership.</p>	Two Segments Jun-15 & Jun-16	9am-12:30pm	Live Webinar
<p>WEALTH MANAGEMENT</p> <p>PD NEXUS DAYS</p>	<p>» DIDN’T FIND A SEMINAR? Other Teamwork & Leadership titles may be available on-demand.</p>			

<p>ACCOUNTING & ASSURANCE Audit & Assurance Financial Reporting Management Accounting</p> <p>ETHICS</p> <p>FINANCE & ECONOMICS Business Valuations Corporate Finance Financial Modelling</p> <p>PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT Communication & Negotiation Creative Thinking & Decision-Making Self-Management & Wellness Teamwork & Leadership</p> <p>Managing For High Performance Certificate Program Resilient & Advanced Resilient Leadership Certificate Programs</p> <p>PUBLIC PRACTICE MANAGEMENT</p> <p>STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE Risk Management & Fraud Strategy, Governance & Human Resource Strategic & Advanced Strategic Management Certificate Programs</p> <p>TAXATION Commodity Tax - Indirect Tax Series Corporate & Personal Tax Income Tax Series Not-For-Profit Organizations Trusts & Estates US & International Tax</p> <p>TECHNOLOGY & INNOVATION Business Transformation & Emerging Issues Software & Tools</p> <p>WEALTH MANAGEMENT</p> <p>PD NEXUS DAYS</p>	<p>MANAGING FOR HIGH PERFORMANCE CERTIFICATE PROGRAM</p>	<p>Building High Performance Teams</p> <p>Learn how to diagnose and remedy your team’s capability to work smarter and accomplish more in less time, how to encourage genuine two-way feedback, become stress and dispute free, and “turn on” the new generation of knowledge workers who will ultimately determine your fate.</p>	<p>Available Fall 2023</p>	<p>Live Webinar</p>
		<p>Correcting Employee Problem Behaviour</p> <p>This seminar focuses on how to initiate timely, constructive conversations, offer candid and beneficial feedback, confront sub-par performance issues, and adroitly handle disagreements and pushback.</p>	<p>Available Fall 2023</p>	<p>Live Webinar</p>
		<p>Hire the Best, Keep Them and Fire the Worst</p> <p>The objective of every smart leader is to surround themselves with a team of bright and committed people. To achieve and then scale sustainable competitive advantage, you need to hire (and keep) those with the potential to grow. That’s always been the indisputable imperative of every successful organization.</p>	<p>Available Fall 2023</p>	<p>Live Webinar</p>
		<p>Managing a Multi-generational Workplace</p> <p>Almost 60% of managers today experience conflicts between older and younger workers on a frequent basis. Unintentionally, they’re often the cause of it. Gain a better understanding of what happens when generational values and preferences collide, what motivates and what divides each age-dominant cohort, how their contrasting experiences influence their behaviours, and what you can do to enhance engagement, connection and collaboration.</p>	<p>Available Fall 2023</p>	<p>Live Webinar</p>

SEMINAR SCHEDULE CATEGORY & TITLE

<p>ACCOUNTING & ASSURANCE Audit & Assurance Financial Reporting Management Accounting</p> <p>ETHICS</p> <p>FINANCE & ECONOMICS Business Valuations Corporate Finance Financial Modelling</p>	<p>NEW Managing a Multicultural Workforce</p> <p>As a manager in a culturally diverse workforce, you need to know how ethnic differences affect the way in which your direct reports function as a team, make decisions, handle disagreements, deal with time pressures, receive feedback, respond to issues of trust, and disagree with each other. Discover meaningful strategies for altering your management style to enable greater cross-cultural collaboration, creativity, and accountability.</p>	<p>Aug-17</p>	<p>9am-12pm</p>	<p>Live Webinar</p>
<p>PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT Communication & Negotiation Creative Thinking & Decision-Making Self-Management & Wellness Teamwork & Leadership</p>	<p>NEW Understanding the Human Condition</p> <p>Everything we do in life is a consequence of how the brain works. It determines our success or failure, personally as well as professionally. It's what makes us human. But our hard-working neurons aren't always functioning to our advantage. This course is about the role biases, beliefs, and thinking traps play in our lives – how they complicate it, influence our decisions, drive irrational thinking, and get us into trouble. This course will give you the antidotes. When you're able to apply them, you'll discover how to live a fuller, freer, and richer existence – for yourself as well as others.</p>	<p>Aug-03</p>	<p>9am-12pm</p>	<p>Live Webinar</p>
<p>Managing For High Performance Certificate Program Resilient & Advanced Resilient Leadership Certificate Programs</p> <p>PUBLIC PRACTICE MANAGEMENT</p> <p>STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE Risk Management & Fraud Strategy, Governance & Human Resource Strategic & Advanced Strategic Management Certificate Programs</p> <p>TAXATION Commodity Tax - Indirect Tax Series Corporate & Personal Tax Income Tax Series Not-For-Profit Organizations Trusts & Estates US & International Tax</p> <p>TECHNOLOGY & INNOVATION Business Transformation & Emerging Issues Software & Tools</p> <p>WEALTH MANAGEMENT</p> <p>PD NEXUS DAYS</p>	<p>Why Successful Companies Fail: Forewarned is Forearmed</p> <p>Not recognizing when the fundamentals of business have changed borders on corporate inertia and negligence. With the right tools and a different understanding of volatility, disruption, and uncertainty, decline is not inevitable. The solution lies in recognizing and acting on some uncomfortable but rarely acknowledged truths. This webinar outlines the scope of the problem and tells you what you need to do to ensure it doesn't kill your golden goose.</p>	<p>Aug-15</p>	<p>9am-12pm</p>	<p>Live Webinar</p>
<p>» READ MORE on this latest certificate program on page 83. You can choose to register for individual seminars. Upon completion of all, you will be eligible to receive the program certificate. You will also receive a discount on the last seminar you register for in the program.</p>				

<p>ACCOUNTING & ASSURANCE Audit & Assurance Financial Reporting Management Accounting</p> <p>ETHICS</p> <p>FINANCE & ECONOMICS Business Valuations Corporate Finance Financial Modelling</p> <p>PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT Communication & Negotiation Creative Thinking & Decision-Making Self-Management & Wellness Teamwork & Leadership Managing For High Performance Certificate Program</p> <p>Resilient & Advanced Resilient Leadership Certificate Programs</p> <p>PUBLIC PRACTICE MANAGEMENT</p> <p>STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE Risk Management & Fraud Strategy, Governance & Human Resource Strategic & Advanced Strategic Management Certificate Programs</p> <p>TAXATION Commodity Tax - Indirect Tax Series Corporate & Personal Tax Income Tax Series Not-For-Profit Organizations Trusts & Estates US & International Tax</p> <p>TECHNOLOGY & INNOVATION Business Transformation & Emerging Issues Software & Tools</p> <p>WEALTH MANAGEMENT</p> <p>PD NEXUS DAYS</p>	<p>RESILIENT & ADVANCED RESILIENT LEADERSHIP CERTIFICATE PROGRAMS</p>	<p>Advanced Resilient Leadership – Brave Spaces and a Curious Mindset: Amp up the Learning!</p>	<p>Jun-16</p>	<p>9am-12:30pm</p>	<p>Live Webinar</p>
		<p>Is it time to think again? Is your team learning and unlearning? Old beliefs and stale thinking can keep teams stuck and unproductive. How can you support your team to keep stepping up to new challenges, learn fast, and continue to perform? This session is packed with a dozen ideas leaders can apply so people are excited to learn together, share ideas, ask questions, make suggestions, and improve over time.</p>			
		<p>Advanced Resilient Leadership – From Languishing to Flourishing: How to Get Happy at Work</p>	<p>Jun-30</p>	<p>9am-12:30pm</p>	<p>Live Webinar</p>
		<p>Leave inspired about what is possible when you focus on opportunities for real joy in the workplace. What would happen if people finished every day of work thinking, “that was awesome”? It is the uplifting moments we remember because we learned something, felt proud of something, laughed and smiled about something, or had a real moment of connection with someone. This session will outline ways to make those days happen more often.</p>			
		<p>Advanced Resilient Leadership – From Success to Significance: Make Work Meaningful</p>	<p>Jun-22</p>	<p>9am-12:30pm</p>	<p>Live Webinar</p>
		<p>How does an accountant make work meaningful? In so many ways. If you are beginning to ask this question and are ready to take some concrete actions to bring purpose to work, this session will help. Learn strategies to optimize your group’s environment, language, rituals, and structures to bring more energy and attention to what makes work meaningful and satisfying.</p>			

SEMINAR SCHEDULE CATEGORY & TITLE

<p>ACCOUNTING & ASSURANCE Audit & Assurance Financial Reporting Management Accounting</p> <p>ETHICS</p> <p>FINANCE & ECONOMICS Business Valuations Corporate Finance Financial Modelling</p> <p>PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT Communication & Negotiation Creative Thinking & Decision-Making Self-Management & Wellness Teamwork & Leadership Managing For High Performance Certificate Program</p> <p>Resilient & Advanced Resilient Leadership Certificate Programs</p> <p>PUBLIC PRACTICE MANAGEMENT</p> <p>STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE Risk Management & Fraud Strategy, Governance & Human Resource Strategic & Advanced Strategic Management Certificate Programs</p> <p>TAXATION Commodity Tax - Indirect Tax Series Corporate & Personal Tax Income Tax Series Not-For-Profit Organizations Trusts & Estates US & International Tax</p> <p>TECHNOLOGY & INNOVATION Business Transformation & Emerging Issues Software & Tools</p> <p>WEALTH MANAGEMENT</p> <p>PD NEXUS DAYS</p>	<p>Advanced Resilient Leadership – From Toxic to Terrific: Change Your Team for the Better</p> <p>This session will help you develop a game plan to move teams from isolated to all in. Helping your team move away from apathy, cynicism, and negativity, and towards caring, optimism, ownership, positive energy, and resilience is not a waiting game. It is a decision to take action. You will take away 10 useable ideas that you and your team can try out right now.</p>	Jun-09	9am-12:30pm	Live Webinar
	<p>Resilient Leadership – Balance Life, Work, and Overwhelm</p> <p>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.</p>	Jun-21	9am-12:30pm	Live Webinar
	<p>Resilient Leadership – Energize Your Team Through Uncertainty</p> <p>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.</p>	May-30	9am-12:30pm	Live Webinar
	<p>Resilient Leadership – Five Qualities of a Leader Who Thrives in a Crisis</p> <p>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.</p>	May-16	9am-12:30pm	Live Webinar

<p>ACCOUNTING & ASSURANCE Audit & Assurance Financial Reporting Management Accounting</p> <p>ETHICS</p> <p>FINANCE & ECONOMICS Business Valuations Corporate Finance Financial Modelling</p>	<p>Resilient Leadership - Manage Your Mindset and Emotional Well-being</p> <p>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.</p>	<p>Jun-14</p>	<p>9am-12:30pm</p>	<p>Live Webinar</p>
<p>PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT Communication & Negotiation Creative Thinking & Decision-Making Self-Management & Wellness Teamwork & Leadership Managing For High Performance Certificate Program</p>	<p>Resilient Leadership - Who's Listening?</p> <p>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.</p>	<p>Jun-07</p>	<p>9am-12:30pm</p>	<p>Live Webinar</p>
<p>Resilient & Advanced Resilient Leadership Certificate Programs</p>	<p>» THE RESILIENT and ADVANCED RESILIENT LEADERSHIP Certificate programs are taught by Tammy Robertson, listen to her podcast to learn how you can be a resilient leader. You can choose to register for individual seminars. Upon completion of all, you will be eligible to receive the program certificate. You will also receive a discount on the last seminar you register for in the program.</p>			
<p>PUBLIC PRACTICE MANAGEMENT</p> <p>STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE Risk Management & Fraud Strategy, Governance & Human Resource Strategic & Advanced Strategic Management Certificate Programs</p> <p>TAXATION Commodity Tax - Indirect Tax Series Corporate & Personal Tax Income Tax Series Not-For-Profit Organizations Trusts & Estates US & International Tax</p> <p>TECHNOLOGY & INNOVATION Business Transformation & Emerging Issues Software & Tools</p> <p>WEALTH MANAGEMENT</p> <p>PD NEXUS DAYS</p>				

- ACCOUNTING & ASSURANCE
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- PUBLIC PRACTICE MANAGEMENT**
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 - Strategy, Governance & Human Resource
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 - Software & Tools
- WEALTH MANAGEMENT
- PD NEXUS DAYS

PUBLIC PRACTICE MANAGEMENT

Branding & Marketing for Small Business	Jul-12	8:30am-12pm	Live Webinar
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As a business owner, it can be easy to push branding and marketing further down your to-do list. Review essential branding and marketing activities that will assist you in reaching your business goals. From visual identity (think logo, brand colours, and images), to online presence (think websites, social media and other digital platforms), explore different tactics to help you harness the power of branding and marketing.

CPA Firm Manager Leadership Skills Certificate Program	Eight Segments Jun-28, Jul-05, Jul-12, Jul-19, Jul-26, Aug-02, Aug-09, Aug-16	2pm-4pm	Live Webinar
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Demonstrate to CPA firms that you have learned essential communication and productivity skills that are key to being a manager. This eight-module certificate program was specifically designed to provide new managers working at a CPA firm with the important skills required as a manager and leader.

» **SEE** page [84](#) for more details on this program, and watch a [short video](#) on why you should attend

Digital Marketing Essentials for Accountants	Jul-18	8:30am-12pm	Live Webinar
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Digital marketing is one way to reach your business and career goals - it is essential for staying relevant in 2023 and beyond. Whether you are looking to build your client base, attract the right talent to your organization, or develop a stronger online presence, examine and understand the digital marketing tools that can help you get there.

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

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STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE

RISK MANAGEMENT & FRAUD

Understanding the Financial Risk of Employee Benefits Jun-15 9am-12:30pm Live Webinar

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.

» **READ** instructor Dan Eisner’s article on [employee benefits inflation projection for 2023](#).

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

STRATEGY, GOVERNANCE & HUMAN RESOURCE

NEW Attracting and Retaining Talent in a Post-pandemic World Jul-07 9am-12:30pm Live Webinar

The immense business risk due to turnover, lack of available talent, and the inevitable departure of those nearing retirement age creates an ever-increasing need to engage, retain, and replace key talent. Explore a practical approach to ensure individual and organizational success in attracting and retaining talent in both the short and long terms.

Disruption and Risk: The New World for Financial Managers Jun-22 9am-5pm Live Webinar

The world is changing quickly and you need to keep ahead of the curve. Examine contemporary issues of vital interest to financial managers. Explore disruptive ideas that will affect the business world over the next decade, and leave with some concrete ideas about what you and your organization should do differently.

SEMINAR SCHEDULE CATEGORY & TITLE

Category	Title	Date	Time	Format
ACCOUNTING & ASSURANCE Audit & Assurance Financial Reporting Management Accounting	Employment Law and HR Practices	May-30	9am-5pm	Live Webinar
	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.	Jun-13	9am-5pm	In-Person, Vancouver
ETHICS				
FINANCE & ECONOMICS Business Valuations Corporate Finance Financial Modelling	Employment Standards Overview	Jul-19	9am-12:30pm	Live Webinar
PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT Communication & Negotiation Creative Thinking & Decision-Making Self-Management & Wellness Teamwork & Leadership Managing For High Performance Certificate Program Resilient & Advanced Resilient Leadership Certificate Programs	This seminar provides an overview introduction to key provisions of the BC Employment Standards Act (ESA), with emphasis on new obligations and commonly misunderstood requirements.	<i>Available Online On-demand</i>		
	» LEARN MORE about instructor Geoffrey Howard on page 10 .			
PUBLIC PRACTICE MANAGEMENT	ERP Selection and Implementation	Jun-07	8:30am-12:30pm	Live Webinar
STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE	The term ERP strikes fear in many, as most people have heard horror stories about implementations gone wrong. Eliminate those fears and obtain some answers on ERP systems for both small and large organizations, as well as the steps required to prepare for selecting, implementing, and supporting an ERP system.			
Risk Management & Fraud				
Strategy, Governance & Human Resource	Handling Termination of Employment	Aug-15	8:30am-10:30am	Live Webinar
Strategic & Advanced Strategic Management Certificate Programs	This session will provide an overview of issues surrounding the termination of employment, and will include any recent updates in the area. Receive a comprehensive summary of employer termination liabilities, become more aware of all the issues relating to termination of employment and learn a practical framework for planning.	<i>Available Online On-demand</i>		
TAXATION Commodity Tax - Indirect Tax Series Corporate & Personal Tax Income Tax Series Not-For-Profit Organizations Trusts & Estates US & International Tax	Mergers and Acquisitions - Aligning your Financial Systems, Processes & People	Jun-14	8:30am-10:30am	Live Webinar
TECHNOLOGY & INNOVATION Business Transformation & Emerging Issues Software & Tools	Mergers and acquisitions have become a part of normal business for many companies and often these opportunities come when you least expect it. Walk through the steps required for aligning your financial systems, business practices, and people in this new organization.			
WEALTH MANAGEMENT PD NEXUS DAYS				

<p>ACCOUNTING & ASSURANCE Audit & Assurance Financial Reporting Management Accounting</p> <p>ETHICS</p> <p>FINANCE & ECONOMICS Business Valuations Corporate Finance Financial Modelling</p> <p>PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT Communication & Negotiation Creative Thinking & Decision-Making Self-Management & Wellness Teamwork & Leadership Managing For High Performance Certificate Program Resilient & Advanced Resilient Leadership Certificate Programs</p> <p>PUBLIC PRACTICE MANAGEMENT</p> <p>STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE Risk Management & Fraud Strategy, Governance & Human Resource Strategic & Advanced Strategic Management Certificate Programs</p> <p>TAXATION Commodity Tax - Indirect Tax Series Corporate & Personal Tax Income Tax Series Not-For-Profit Organizations Trusts & Estates US & International Tax</p> <p>TECHNOLOGY & INNOVATION Business Transformation & Emerging Issues Software & Tools</p> <p>WEALTH MANAGEMENT</p> <p>PD NEXUS DAYS</p>	<p>Workplace Law: All You Wanted to Know About and Were Afraid to Ask</p>	<p>Jul-05</p>	<p>9am-12:30pm</p>	<p>Live Webinar</p>
<p>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.</p>				
<p>» DIDN’T FIND A SEMINAR? Other Strategy, Governance & HR titles may be available on-demand.</p>				
<p>STRATEGIC & ADVANCED STRATEGIC MANAGEMENT CERTIFICATE PROGRAMS</p>				
	<p>Advanced Strategic Management Certificate: Links</p>	<p>May-31</p>	<p>9am-5pm</p>	<p>In-Person, Vancouver</p>
	<p>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.</p>			
	<p>Advanced Strategic Management Certificate: Maps</p>	<p>May-30</p>	<p>9am-5pm</p>	<p>In-Person, Vancouver</p>
	<p>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.</p>			
	<p>Strategic Management Certificate: Change Management</p>	<p>Jun-26</p>	<p>9am-5pm</p>	<p>Live Webinar</p>
	<p>Learn how organizational and human dynamics impact change initiatives, how to plan for change, and examine the main ingredients necessary for successful implementation.</p>			

SEMINAR SCHEDULE CATEGORY & TITLE

ACCOUNTING & ASSURANCE Audit & Assurance Financial Reporting Management Accounting ETHICS FINANCE & ECONOMICS Business Valuations Corporate Finance Financial Modelling PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT Communication & Negotiation Creative Thinking & Decision-Making Self-Management & Wellness Teamwork & Leadership Managing For High Performance Certificate Program Resilient & Advanced Resilient Leadership Certificate Programs PUBLIC PRACTICE MANAGEMENT STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE Risk Management & Fraud Strategy, Governance & Human Resource Strategic & Advanced Strategic Management Certificate Programs TAXATION Commodity Tax - Indirect Tax Series Corporate & Personal Tax Income Tax Series Not-For-Profit Organizations Trusts & Estates US & International Tax TECHNOLOGY & INNOVATION Business Transformation & Emerging Issues Software & Tools WEALTH MANAGEMENT PD NEXUS DAYS	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-06 Jul-21	9am-5pm 9am-5pm	Live Webinar In-Person, Vancouver
	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-14 Jul-20	9am-5pm 9am-5pm	Live Webinar In-Person, Vancouver
	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.	Aug-23	9am-5pm	Live Webinar
» THE STRATEGIC and ADVANCED STRATEGIC MANAGEMENT Certificate Programs are led by Mia Maki, Michael Morrison, and Simon Philp. Read Mia’s article on Doughnut Economics and the push for regenerative, distributive systems. Read more about these programs on page 85 and watch the short videos on the Strategic Management and Advanced programs.				

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WEALTH MANAGEMENT

PD NEXUS DAYS

TAXATION

COMMODITY TAX - INDIRECT TAX SERIES

Emerging Taxes: Luxury Tax Underused Housing Tax	April-06	9:30am-11am	Live Webinar
Indirect Tax Issues with Credit Unions	May-17	8:30am-10am	Live Webinar
GST/HST: Issues with Mortgage and Lending Businesses Investing through Limited Partnerships	Jun-20	8:30am-10am	Live Webinar
Buying and Selling Insurance - Indirect Tax Issues	Jul-19	8:30am-10am	Live Webinar
PST & GST/HST: Issues in Construction and Manufacturing in BC Application to Cross-Border Supplies	Aug-16	8:30am-10am	Live Webinar

» **YOU CAN PICK AND CHOOSE** which seminars to register for or register for the whole series and receive a discount. Series purchasers will also benefit from access to each session’s video recording for a limited time. Didn’t find a seminar? Other Commodity Tax titles may be available [on-demand](#).

CORPORATE & PERSONAL TAX

Corporate Restructuring – Application for Private Corporations	Jun-29	9am-12:30pm	Live Webinar
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.	<i>Available Online On-demand</i>		

SEMINAR SCHEDULE CATEGORY & TITLE

<p>ACCOUNTING & ASSURANCE Audit & Assurance Financial Reporting Management Accounting</p> <p>ETHICS</p> <p>FINANCE & ECONOMICS Business Valuations Corporate Finance Financial Modelling</p> <p>PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT Communication & Negotiation Creative Thinking & Decision-Making Self-Management & Wellness Teamwork & Leadership Managing For High Performance Certificate Program Resilient & Advanced Resilient Leadership Certificate Programs</p> <p>PUBLIC PRACTICE MANAGEMENT</p> <p>STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE Risk Management & Fraud Strategy, Governance & Human Resource Strategic & Advanced Strategic Management Certificate Programs</p> <p>TAXATION Commodity Tax - Indirect Tax Series</p> <p>Corporate & Personal Tax Income Tax Series Not-For-Profit Organizations Trusts & Estates US & International Tax</p> <p>TECHNOLOGY & INNOVATION Business Transformation & Emerging Issues Software & Tools</p> <p>WEALTH MANAGEMENT</p> <p>PD NEXUS DAYS</p>	<p>Corporate Restructuring – Fundamentals</p> <p>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.</p>	<p>Jul-26</p> <p><i>Available Online</i> <i>On-demand</i></p>	<p>9am-5pm</p>	<p>Live Webinar</p>	
	<p>Corporate Tax – Investment Holding Companies</p> <p>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?</p>	<p>Jul-11 Jul-14</p> <p><i>Available Online</i> <i>On-demand</i></p>	<p>9am-12:30pm 9am-12:30pm</p>	<p>Live Webinar In-Person, Vancouver</p>	
	<p>Corporate Tax – RDTOH, CDA and Other Tax Accounts</p> <p>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 GROU, LRIP, CDA, and the three RDTOH pools. The focus of this seminar is applying an understanding of these pools to effective tax planning.</p>	<p>Jun-07</p> <p><i>Available Online</i> <i>On-demand</i></p>	<p>9am-12:30pm</p>	<p>Live Webinar</p>	
	<p>Corporate Tax – Review of Tax Planning</p> <p>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.</p>	<p>Two Segments Jul-13 & Jul-14</p> <p><i>Available Online</i> <i>On-demand</i></p>	<p>9am-5pm</p>	<p>Live Webinar</p>	

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		<p>Corporate Tax – Shutting Down the Corporation</p> <p>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.</p>	Jun-26	9am-12:30pm	Live Webinar
		<p>Corporate Tax – Small Business Deduction and Private Corporate Groups</p> <p>While the small business deduction reduces the amount of income tax for many corporations, the myriad of rules and 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.</p>	Jun-22	9am-5pm	Live Webinar
		<p>Creative Use of Partnerships in Tax Planning</p> <p>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.</p>	Date TBA	9am-12:30pm	Live Webinar
				<p><i>Available Online</i> <i>On-demand</i></p>	

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		<p>Income Tax – Everyday Issues for General Practitioners</p> <p>CPAs in public practice who assist clients with income tax compliance and plans find that even routine matters can have complexities, alternatives, and uncertainties. This seminar identifies income tax matters that practitioners frequently encounter and demonstrates how income tax rules apply in everyday situations. Practical issues are presented as examples and the seminar emphasizes opportunities, problems, suggestions, and plans for each topic.</p>	Jun-13 Jul-13	9am-5pm 9am-5pm	Live Webinar In-Person, Vancouver
		<p>Income Tax – Income Splitting</p> <p>The Income Tax Act contains several measures related to income splitting; and while some are permissive, most are restrictive. This seminar covers the tax benefits of income splitting, provides a detailed review of relevant income tax legislation, including the expanded TOSI rules, and reviews remaining opportunities to accomplish income splitting.</p>	Jul-14	9am-5pm	In-Person, Vancouver
		<p>Income Tax – Planning for Business Succession</p> <p>This seminar provides practical knowledge of the principal business succession considerations. Participants will walk through the various stages of a business life cycle, with a view to identifying opportunities, techniques, and tax considerations associated to intra-family and arm’s length succession planning for private companies. This seminar provides the knowledge and tools necessary to identify, plan, and manage business succession considerations for owner-managers of private companies.</p>	Jun-15	9am-5pm	Live Webinar

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	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.	Jun-20 Aug-03 <i>Available Online</i> <i>On-demand</i>	9am-5pm 9am-5pm	Live Webinar In-Person, Vancouver
	Personal Tax – Review of Tax Planning This 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 <i>Available Online</i> <i>On-demand</i>	9am-5pm	Live Webinar

» **DIDN'T FIND A SEMINAR?** Other Corporate & Personal Tax titles may be available [on-demand](#).

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- PD NEXUS DAYS

INCOME TAX SERIES

Emerging Taxes: Luxury Tax and Underused Housing Tax	April-06	9:30am-11am	Live Webinar
Trusts (Recorded from Fall 2022, instructor will be available live at the end for questions)	May-10	AM Time TBA	Live Webinar
Consequences to Avoid	Jun-15	8am-9:30am	Live Webinar
Notifiable and Reportable Transactions	Jul-12	9am-10:30am	Live Webinar
EIFEL Rules	Aug-14	8:30am-10am	Live Webinar

» **YOU CAN PICK AND CHOOSE** which seminars to register for or register for the whole series and receive a discount. Series purchasers will also benefit from access to each session’s video recording for a limited time.

NOT-FOR-PROFIT ORGANIZATIONS

» While there are no live Not-for-Profit Organization titles scheduled for Spring and Summer, seminars in this topic area may be available [on-demand](#).

TRUSTS & ESTATES

Life-Interest Trusts as Will Substitutes: The Use and Taxation of Alter Ego Trusts and Joint Spousal or Common-Law Partner Trusts	Jun-21	9am-12:30pm	In-Person, Vancouver
<p>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.</p>			

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	<p>» DIDN'T FIND A SEMINAR? Other Trusts & Estates titles may be available on-demand.</p>				
		<p>US & INTERNATIONAL TAX</p>			
		<p>US Corporate Tax - Fundamentals</p> <p>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.</p>	<p>Jul-05</p> <p><i>Available Online</i> <i>On-demand</i></p>	<p>9am-5pm</p>	<p>Live Webinar</p>
		<p>US Personal Tax - Fundamentals</p> <p>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.</p>	<p>Date TBA</p> <p><i>Available Online</i> <i>On-demand</i></p>	<p>9am-5pm</p>	<p>Live Webinar</p>
		<p>» DIDN'T FIND A SEMINAR? Other US & International Tax titles may be available on-demand.</p>			

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TECHNOLOGY & INNOVATION

BUSINESS TRANSFORMATION & EMERGING ISSUES

<p>NEW Artificial Intelligence for Accounting and Finance Professionals</p> <p>Artificial Intelligence (AI) is a practical tool available today to help address and solve real-world problems. Learn about the fundamentals of AI and how they can be put to work today to help you and your team work more efficiently and effectively. Explore AI features available in everyday applications, and how they are changing the way accounting and financial professionals work, both today and in the future.</p>	Jun-12	9am-12:30pm	Live Webinar
<p>Blockchain Essentials for CPAs</p> <p>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.</p>	Jun-15	1:30pm-5pm	Live Webinar
<p>Data Analytics and the Future of Finance</p> <p>Explore the importance of analytics to the future role of finance, as well as the challenges and opportunities for teams and individuals. Gain some fundamental ideas and techniques that can be immediately applied at work. Assess how prepared you and your organization are for the future role of finance, and how to proactively plan and develop your path to becoming an analytics professional.</p>	Two Segments Jun-05 & Jun-07	2pm-5:30pm	Live Webinar

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	<p>Digital Transformation Toolbox - Preparing for the Future of Accounting</p> <p>Technology advances are shaping the future of accounting and the pace of digital change is faster than ever. No accountant can ignore the onslaught of AI, blockchain, and automation. Participate in this interactive discussion on how technology is transforming accounting, and how to future-proof your finance career.</p> <p>» READ instructor John Hetherington's article on how integrating IoT, APIs, and data analytics can lead to better decisions and faster audits or listen to his podcast episode.</p>	May-25	8:30am-10:30am	Live Webinar
	<p>Emerging Technologies for Accountants, Including Blockchain and Cryptocurrencies</p> <p>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.</p>	Aug-10	9am-12:30pm	Live Webinar
	<p>Foundations of Blockchain</p> <p>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.</p>	Jun-15	9am-12:30pm	Live Webinar

<p>ACCOUNTING & ASSURANCE Audit & Assurance Financial Reporting Management Accounting</p>	<p>PD Nexus: Information Technology Insights 2023 This annual conference is designed for accountants who need to stay on top of technological advancements and decide which applications are worth their while. Participants will explore technologies that can help modern workers manage their hefty workloads. Register for a single-day option or both days.</p>	<p>Two Days Jul-25 & Jul-26</p>	<p>8:30am-4:30pm</p>	<p>Live Webinar</p>
<p>ETHICS FINANCE & ECONOMICS Business Valuations Corporate Finance Financial Modelling</p>	<p>Technology for CPAs – Don’t Get Left Behind Survey today’s IT environment and learn about computer hardware, software (including Office 2016), operating systems (including Windows 10) and what they mean for you, as well as peripheral devices. Learn about significant trends in information technology, how to take advantage of the opportunities presented, and improve the overall performance of your IT investment. Learn from real-time demonstrations of practical applications of the latest tools.</p>	<p>Two Segments Jun-27 & Jun-28</p>	<p>9am-12:30pm</p>	<p>Live Webinar</p>
<p>PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT Communication & Negotiation Creative Thinking & Decision-Making Self-Management & Wellness Teamwork & Leadership Managing For High Performance Certificate Program Resilient & Advanced Resilient Leadership Certificate Programs</p>	<p>Technology Update 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.</p>	<p>Jun-22</p>	<p>9am-12:30pm</p>	<p>Live Webinar</p>
<p>PUBLIC PRACTICE MANAGEMENT STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE Risk Management & Fraud Strategy, Governance & Human Resource Strategic & Advanced Strategic Management Certificate Programs</p>	<p>» DIDN’T FIND A SEMINAR? Other Business Transformation & Emerging Issues titles may be available on-demand.</p>			
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	<p>Advanced Excel</p> <p>For experienced Excel users seeking to elevate your skills, this seminar will provide critical advanced Excel skills in six key areas: collaborating with other users and securing workbooks; using tables to analyze and report data; integrating and manipulating data from external sources; creating and auditing complex formulas; advanced data analysis tools; and visualization techniques to analyze and communicate information.</p>	<p>Two Segments Jul-11 & Jul-12 Aug-08 & Aug-09</p>	<p>9am-12:30pm 9am-12:30pm</p>	<p>Live Webinar Live Webinar</p>
	<p>Advanced Excel Data Magic - Managing, Analyzing, and Reporting</p> <p>Leave those manual reporting processes behind and move into the new world of automatically linking data into Excel for analyzing, reporting, and preparing visualizations. Using tools such as Power Query and Power Pivot, you can leverage your existing knowledge of PivotTables to do even more when it comes to summarizing, analyzing, and reporting potentially very large volumes of data. If you currently use PivotTables on a regular basis, take advantage of the powerful advanced reporting features available in Excel.</p>	<p>Two Segments Jun-26 & Jun-27</p>	<p>9am-12:30pm</p>	<p>Live Webinar</p>
	<p>An End to Manual Effort in Excel: The Power Query Effect</p> <p>The sad reality is that not all data is stored in nicely curated databases and often - even when it is - the data analyst doesn't have access. Learn how Power Query can clean up, reshape and combine your data with ease. Converting ASCII files into tables, combining multiple text files in one shot and even un-pivoting data is not only simple, but an investment in the future, refreshable with a single click when next needed.</p>	<p>Jun-15 Aug-15</p>	<p>9am-5pm 9am-5pm</p>	<p>Live Webinar In-Person, Vancouver</p>
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	NEW ChatGPT and Generative Artificial Intelligence for Accountants This seminar is designed to equip you with the skills to leverage the power of AI in the field of accounting. Learn how to use state-of-the-art language models such as ChatGPT to improve data analysis and interpretation, technical proficiency, communication and collaboration, and creative problem-solving. Embrace the power of AI and jumpstart your journey towards becoming a leader in the field.	Two Segments Aug-02 & Aug-03	9am-12:30pm	Live Webinar
	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.	Jun-27	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.	Jun-23	9am-5pm	Live Webinar

SEMINAR SCHEDULE CATEGORY & TITLE

<p>ACCOUNTING & ASSURANCE Audit & Assurance Financial Reporting Management Accounting</p> <p>ETHICS</p> <p>FINANCE & ECONOMICS Business Valuations Corporate Finance Financial Modelling</p> <p>PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT Communication & Negotiation Creative Thinking & Decision-Making Self-Management & Wellness Teamwork & Leadership Managing For High Performance Certificate Program Resilient & Advanced Resilient Leadership Certificate Programs</p> <p>PUBLIC PRACTICE MANAGEMENT</p> <p>STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE Risk Management & Fraud Strategy, Governance & Human Resource Strategic & Advanced Strategic Management Certificate Programs</p> <p>TAXATION Commodity Tax - Indirect Tax Series Corporate & Personal Tax Income Tax Series Not-For-Profit Organizations Trusts & Estates US & International Tax</p> <p>TECHNOLOGY & INNOVATION Business Transformation & Emerging Issues</p> <p>Software & Tools</p> <p>WEALTH MANAGEMENT PD NEXUS DAYS</p>	<p>Excel 3: Dynamic Dashboards</p> <p>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.</p>	Jul-06	9am-5pm	Live Webinar
	<p>Excel 365: Advanced Data Analysis</p> <p>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.</p>	Jun-22	9am-12:30pm	Live Webinar
	<p>Excel Boot Camp</p> <p>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. In addition to long-standing features in Excel, this seminar will highlight the number of recent improvements to Excel including additions to the function library, tables, a vastly improved charting engine, and an overhaul of PivotTable functionality.</p>	Four Segments Aug-15, Aug-16, Aug-17 & Aug-18	9am-12:30pm	Live Webinar
	<p>Excel Financial Models and Analysis</p> <p>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.</p>	May-26 Jul-24	9am-5pm 9am-5pm	Live Webinar In-Person, Vancouver

SEMINAR SCHEDULE CATEGORY & TITLE

Category & Title	Date	Time	Format
ACCOUNTING & ASSURANCE Audit & Assurance Financial Reporting Management Accounting	Excel: Specific Skills for Budgeting, Planning, and 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.	Jun-23	9am-5pm Live Webinar
ETHICS FINANCE & ECONOMICS Business Valuations Corporate Finance Financial Modelling	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.	Jul-10 Aug-14	9am-5pm 9am-5pm Live Webinar In-Person, Vancouver
PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT Communication & Negotiation Creative Thinking & Decision-Making Self-Management & Wellness Teamwork & Leadership Managing For High Performance Certificate Program Resilient & Advanced Resilient Leadership Certificate Programs	Getting Started with Excel Power Pivot The capabilities of Power Pivot are amazing, but they require a sound understanding of a concept called “dimensional modeling” in order to get started. Explore what this means, how to design your tables properly as well as link them together in the correct way. Learn the right way to set up your dimensional model in order to make the next stage - writing DAX formulas - easy.	Jul-27	9am-5pm Live Webinar
PUBLIC PRACTICE MANAGEMENT STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE Risk Management & Fraud Strategy, Governance & Human Resource Strategic & Advanced Strategic Management Certificate Programs	Google Business Tools for Accountants Attend this course to obtain a concise overview of Google’s more than 200 online enterprise tools. These include services that can be used by accountants for communication, publishing, mobile connectivity, advertising, entrepreneurship, and other core business functions.	Two Segments Jul-25 & Jul-26	9am-12:30pm Live Webinar
TAXATION Commodity Tax - Indirect Tax Series Corporate & Personal Tax Income Tax Series Not-For-Profit Organizations Trusts & Estates US & International Tax	» READ instructor Garrett Wasny’s article on how CPAs can upgrade their digital skills to stay competitive or listen to his podcast episode.		
TECHNOLOGY & INNOVATION Business Transformation & Emerging Issues Software & Tools			
WEALTH MANAGEMENT PD NEXUS DAYS			

SEMINAR SCHEDULE CATEGORY & TITLE

<p>ACCOUNTING & ASSURANCE Audit & Assurance Financial Reporting Management Accounting</p>	<p>Google is Not Enough: The Best Search Tools You Aren't Using (But Should!)</p>	<p>Two Segments Aug-09 & Aug-10</p>	<p>9am-12:30pm</p>	<p>Live Webinar</p>
<p>ETHICS FINANCE & ECONOMICS Business Valuations Corporate Finance Financial Modelling</p>	<p>Attend this course to obtain a concise overview of leading non-Google search tools, and how they can be used by practitioners to sharpen their online intelligence gathering. Attendees will discover a whole new universe of search applications that can be used to discover prime information not found on Google.</p>			
<p>PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT Communication & Negotiation Creative Thinking & Decision-Making Self-Management & Wellness Teamwork & Leadership Managing For High Performance Certificate Program Resilient & Advanced Resilient Leadership Certificate Programs</p>	<p>Hands-on Techniques to Create Effective Financial Visuals in Excel and PowerPoint</p>	<p>Two Segments Jun-07 & Jun-08</p>	<p>9am-12:30pm</p>	<p>Live Webinar</p>
<p>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.</p>				
<p>» READ instructor Dave Paradi's article Five Tips for Creating Effective Data Visuals.</p>				
<p>PUBLIC PRACTICE MANAGEMENT STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE Risk Management & Fraud Strategy, Governance & Human Resource Strategic & Advanced Strategic Management Certificate Programs</p>	<p>Health Check for Your Financial Systems & Processes</p>	<p>Jun-21</p>	<p>8:30am-10:30am</p>	<p>Live Webinar</p>
<p>As businesses change and adapt to the new world realities, more pressure is placed on finance and accounting to lower costs, while continuing to meet regulatory reporting requirements and delivering more information for the business to evaluate financial performance. Explore ways to evaluate if your financial systems are meeting you current and future needs and if you have the right resources and practices to manage the demands of your organization.</p>				
<p>TAXATION Commodity Tax - Indirect Tax Series Corporate & Personal Tax Income Tax Series Not-For-Profit Organizations Trusts & Estates US & International Tax</p>	<p>How to Present Financial Data Effectively Using PowerPoint</p>	<p>Two Segments May-30 & May-31</p>	<p>9am-12:30pm</p>	<p>Live Webinar</p>
<p>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.</p>				
<p>TECHNOLOGY & INNOVATION Business Transformation & Emerging Issues</p>				
<p>Software & Tools</p>				
<p>WEALTH MANAGEMENT PD NEXUS DAYS</p>				

SEMINAR SCHEDULE CATEGORY & TITLE

ACCOUNTING & ASSURANCE Audit & Assurance Financial Reporting Management Accounting ETHICS FINANCE & ECONOMICS Business Valuations Corporate Finance Financial Modelling PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT Communication & Negotiation Creative Thinking & Decision-Making Self-Management & Wellness Teamwork & Leadership Managing For High Performance Certificate Program Resilient & Advanced Resilient Leadership Certificate Programs PUBLIC PRACTICE MANAGEMENT STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE Risk Management & Fraud Strategy, Governance & Human Resource Strategic & Advanced Strategic Management Certificate Programs TAXATION Commodity Tax - Indirect Tax Series Corporate & Personal Tax Income Tax Series Not-For-Profit Organizations Trusts & Estates US & International Tax TECHNOLOGY & INNOVATION Business Transformation & Emerging Issues Software & Tools WEALTH MANAGEMENT PD NEXUS DAYS	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-14	9am-12:30pm	Live Webinar
	Rapid Dashboard Development with Power BI Desktop Power BI Desktop allows rapid collection and cleaning of data and creates a relational database of the data on the fly. But the best part is that once this work is done it provides access to compelling dashboards that are attractive, interactive and best of all incredibly easy to both build and refresh. Gain an introduction to the five different areas that make up Power BI: Sourcing data, modeling data, building formulas, creating visualizations and sharing.	Jun-16 Aug-14	9am-5pm 9am-5pm	Live Webinar In-Person, Vancouver
	VBA Fundamentals - from Zero to Hero This is a two-day, hands-on VBA course that takes someone from no coding experience to understanding VBA fundamentals. Learn the concepts the way an accountant understands them, with examples that are accounting focused.	Two Segments Jul-11 & Jul-13	9am-5pm	Live Webinar
	» DIDN'T FIND A SEMINAR? Other Software & Tools titles may be available on-demand .			

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 - Software & Tools
- WEALTH MANAGEMENT**
- PD NEXUS DAYS

WEALTH MANAGEMENT

<p>A Six Point Plan for Financial Freedom</p> <p>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.</p>	<p>Jun-22</p> <p>Aug-15</p> <p><i>Available Online</i> <i>On-demand</i></p>	<p>9am-5pm</p> <p>9am-5pm</p>	<p>Live Webinar</p> <p>Live Webinar</p>
<p>Designing Retirement Income</p> <p>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.</p> <p>» READ instructor Kurt Rosentreter's article on building an investment portfolio to match life goals.</p>	<p>Two Segments</p> <p>Jun-08 & Jun-09</p>	<p>9am-12:30pm</p>	<p>Live Webinar</p>
<p>Everything You Need to Know about Government, Bank, and Personal Debt</p> <p>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.</p>	<p>Jul-20</p> <p><i>Available Online</i> <i>On-demand</i></p>	<p>9am-12:30pm</p>	<p>Live Webinar</p>
<p>Financial Planning for 30-to-40-Year-Olds</p> <p>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.</p>	<p>Jun-05</p>	<p>9am-12:30pm</p>	<p>Live Webinar</p>

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	<p>Smoke and Mirrors: Financial Myths that will Ruin Your Retirement Dreams</p> <p>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.</p>	<p>Jun-29</p>	<p>9am-5pm</p>	<p>Live Webinar</p>	
	<p>The Procrastinator's Guide to Retirement</p> <p>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.</p>	<p>Aug-08</p>	<p>9am-5pm</p>	<p>Live Webinar</p>	
	<p>The Simplest Personal Finance Strategy Ever</p> <p>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.</p>	<p>Jul-18</p>	<p>9am-5pm</p>	<p>Live Webinar</p>	
	<p>» DIDN'T FIND A SEMINAR? Other Wealth Management titles may be available on-demand.</p>				
	<p><i>Available Online On-demand</i></p>				
	<p><i>Available Online On-demand</i></p>				

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PD NEXUS DAYS

<p>Business and Leadership Insights</p> <p>The past three years have been unpredictable, and there are many new challenges on the horizon. This conference will help you “embrace the now” of this uncertainty by offering three streams of sessions on timely topics relevant to your current work and environment.</p>	<p>Jul-18</p>	<p>8:30am-4:30pm</p>	<p>Hyatt Regency, Vancouver</p>
<p>Information Technology Insights 2023</p> <p>This annual conference is designed for accountants who need to stay on top of technological advancements and decide which applications are worth their while. Participants will explore technologies that can help modern workers manage their hefty workloads. Register for a single-day option or both days.</p>	<p>Two Days Jul-25 & Jul-26</p>	<p>8:30am-4:30pm</p>	<p>Live Webinar</p>

» **READ MORE** About our Summer Nexus Days on pages [73](#) and [74](#).

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, 2023**



Special Discount

Additional 10% discount on 2022-23 Passports Purchased **up to August 31, 2023**



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.



PD PASSPORTS

REMINDER **Aug 31, 2023** 2022-23 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.



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.



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.



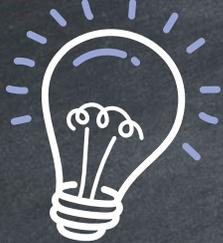
AN EXAMPLE OF POTENTIAL SAVINGS

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

Without Mini PD Passport = \$1,080

1 Mini PD Passport = \$899

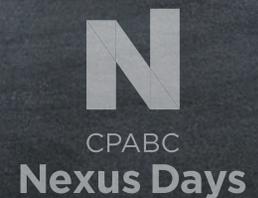
You could save **\$181**
or 17% discount



PD Nexus Days for Summer 2023

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.



N
CPABC
Nexus Days

PD NEXUS DAYS SUMMER 2023



Business & Leadership INSIGHTS *Embracing the Now*

July 11, 2023 | Hyatt Regency Vancouver
PD Passport Valid: 12 Credits | \$405



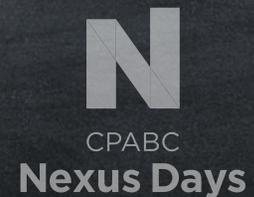
We're excited to bring PD Nexus: Business and Leadership Insights to you in person at the Hyatt Regency Vancouver where you can network with your peers and learn from inspiring speakers face to face.



Join us for an empowering day of connection and learning. With three streams covering technical, leadership, and timely topics of the day, you will come away with tangible tools to support your business, grow your leadership abilities, and embrace current trends. This fast-paced day is a nexus of learning sessions specifically designed to help CPAs and business leaders embrace the now. Now is the time to connect with peers and explore new ideas at this Nexus Day, with sessions on emotional literacy, ChatGPT, financing strategies, leading change, and much more.



» **PRICING** Already reflects discount



PD NEXUS DAYS SUMMER 2023



Information Technology INSIGHTS *Keeping Your Edge*

July 25-26, 2023 | Online Virtual

PD Passport Valid:

Both Days: 24 Credits | \$785

Single Day: 12 Credits | \$405



PD Nexus: Information Technology Insights for 2023 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 – has 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 solutions designed to help alleviate the heavy workloads of today’s busy professionals.

We’re keeping this Nexus Day virtual to maximize accessibility for members in all parts of the province. As always, there will be plenty of opportunities to share ideas and be inspired by your peers and knowledgeable presenters.

» **PRICING** Already reflects discount



CPABC

Nexus Days

EXECUTIVE PROGRAMS

Forging Ahead

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



CPABC
**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 24-27
Online virtual

September 20-23
In-person, Victoria

December 13-16
Online virtual



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.

July 6-7, 13-14
Online virtual

October 15-18
In-person, Victoria

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 6-7, 13-14
Online virtual

October 15-18
In-person, Whistler



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 17-18, 24-25
Online virtual

November 5-8
In-person, Whistler

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.

September 13-16

In-person, Vancouver

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 5-8, 20-22

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.

November 20-22
Online virtual

Smart Leaders 2025

Geared towards leaders in positions of executive responsibility.



Smart Leaders 2025 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.

November 7-9, 21-23
Online virtual

Faculty



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. He has received consistently high accolades for this highly practical program for last ten years.

VIJAY FACILITATES
The CFO as Navigator Program



LINDA LUCAS, CPA, CMA is a principal of Lead Vantage LLP, where she specializes in helping C-level executives and business owners identify and execute their strategic objectives. Her focus is building strong teams to create a culture of innovation and initiative, resulting in operational excellence and increased profitability. Drawing on over 25 years' experience in strategic, operational, and financial management, she knows that the heart of success, in any organization, starts with their people. Linda develops and facilitates leadership programs that emphasizes empowerment, collaboration, and trust. She has helped her clients – from small-and mid-sized companies to national corporations – cultivate a sustainable, adaptable, and future-forward organization.

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.

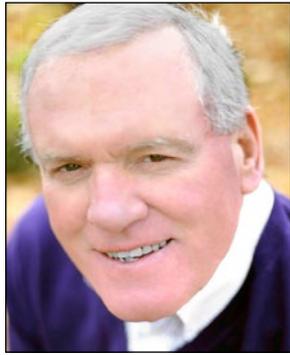
MIA FACILITATES
The Controller's Operational Skills Program



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

Faculty



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”. His full bio is on SmartLeaders.ca.

JIM FACILITATES

The CEO Program
Smart Leaders 2025: Thinking and Innovation Skills



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* and *Finance and Accounting PolicyPro* (guide to governance, procedures, and internal control), both published by CPA Canada.

JEFFREY FACILITATES

The CFO’s Operational Skills 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 the areas of 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 and Leadership Coach who enriches the effectiveness of people and organizations through both skill and heart. 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 with CPABC. His consulting assignments over the last few years included organizations in the private, public and nonprofit sectors. He has also recently published 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 may apply for some programs

NEW Managing for High Performance



Why take this program?

Organizations live or die on the quality of their managers and this is never more the case during today's post-pandemic seismic shift in the employer/employee relationship. Gallup has conducted more than three million studies on organizational performance over the past 30 years. Their research definitively concludes that only one in 10 qualifies as a "high-performance manager." The purpose of this new certificate program is to elevate your skills to this level. Each of the component courses addresses this primary objective from a different perspective. Gallup further affirms that over 70% of the variance in all aspects of employee performance is determined solely by the manager.

Every organization today aspires to be a high-performance enterprise but over 80% fail. And the track record of the very best in their industries is not that much better. Because it's tougher than ever to stay at the top. A high-performance entity is distinguished by sustained customer acquisition and retention, significant revenue growth and profitability, low turnover, and an open, adaptive, resilient culture. It is both smart and healthy, populated by a diverse, engaged workforce of high-potentials and knows when and how to change direction in a volatile, unpredictable and increasingly complex environment.

Who is this program designed for?

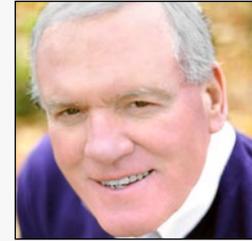
The target audience consists of middle managers or those who aspire to ascend to that level of competence.

This new seven-part program consists of the following seminars:

- Building High Performance Teams
- Correcting Employee Problem Behaviour
- Hire the Best, Keep Them and Fire the Worst
- Managing a Multi-generational Workplace
- Managing a Multicultural Workforce
- Understanding the Human Condition
- Why Successful Companies Fail: Forewarned is Forearmed

Each seminar can be taken as a stand-alone course, but in order to qualify for the certificate, participants are required to complete all seven titles. Titles will be offered across our Spring/Summer and Fall/Winter programs.

» **SAVE MORE** Register for all seven seminars and receive a special bundle pricing. Contact the PD Department at pdreg@bccpa.ca to obtain this discount when you register for the final title. Note that you do not have to register for all the seminars at once, and titles will be scheduled across our programming seasons.



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."

NEW Virtual Presentation Design and Delivery



For the foreseeable future, delivering virtual presentations to internal and external audiences will be a critical professional skill. Many high stakes, virtual presentations currently fall short of the necessary purpose, engagement, and professionalism needed to be effective.

This six-module certificate program will demonstrate to your organization, clients, potential employers, and other key stakeholders that you can design and deliver engaging and effective professional virtual presentations.

The six modules are:

- Module 1 – Virtual Presentation Basics
- Module 2 – Technical Requirements for Virtual Presentations
- Module 3 – Instructional Design for Virtual Presentations: Part 1
- Module 4 – Instructional Design for Virtual Presentations: Part 2
- Module 5 – Virtual Presentation Delivery Skills: Part 1
- Module 6 – Virtual Presentation Delivery Skills: Part 2

Why take this program?

It is not enough to take an existing prepared live presentation and do the same thing in a virtual setting. Current research shows that this will result in a lack of clarity and engagement with your message. Designing and delivering virtual presentations requires specific knowledge and skills to achieve the presentation's purpose.

Who is this program designed for?

Professionals who want the tools and confidence to design and deliver virtual presentations that are clear, purposeful, and engaging.

» **LEARN MORE** Watch the [video](#).

CPA Firm Manager Leadership Skills



Are you a new manager at a CPA Firm? Would you like to effectively lead your team? Do you need to refine your business development or project management skills? What about problem solving or decision making? These are all important skills as a manager and a leader especially at a CPA Firm in BC.

This eight-module leadership skills certificate program focuses on refining the necessary skills to lead your team effectively to success.

The eight modules are:

- Module 1: Leading Teams in a Hybrid Work Environment
- Module 2: Project Management Tools and Techniques
- Module 3: Managing your Managers and Partners
- Module 4: Providing Effective Feedback to your Staff
- Module 5: Business Development and Networking
- Module 6: Creative Problem Solving
- Module 7: Time Management Tools
- Module 8: Professional Ethics for Managers

Why take this program?

By completing this program, participants will enhance their competencies in the following areas: communicating with staff and partners, managing self, collaborating and leading, solving problems, and acting ethically and demonstrating professional values.

Who is this program designed for?

Professionals working in a CPA firm that are recent to the manager level position of the firm.

» **LEARN MORE** Watch the [video](#).



GARTH SHERIFF, CPA, CA, CIA is the founder of Sheriff Consulting, specializing in delivering professional and leadership skills webinars and online courses. Sheriff Consulting's mission is to create a learning environment that is both engaging and impactful to your professional development. Garth has also worked as a professional actor and is a member of the Alliance of Canadian Cinema, Television and Radio Artists.

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.

» **LEARN MORE** Watch the [video](#).

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.

» **LEARN MORE** Watch the [video](#).



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.



MICHAEL MORRISON, CPA, CMA, is the executive director, general support services at Vancouver Island Regional Health Authority, an instructor, and a volunteer.



SIMON PHILP, FCPA, FCMA, is market vice president at CIBC, and presently serves on the board of Community Living BC.

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.

» **LEARN MORE** Watch the [video](#).

Advanced Resilient Leadership

A Culture Blueprint for Changing Times

The four-part Advanced Resilient Leadership Certificate modules are:

- From Toxic to Terrific...Change Your Team for the Better!
- Brave Spaces and a Curious Mindset...Amp up the Learning
- From Success to Significance: Make Work Meaningful
- From Languishing to Flourishing: How to get Happy at Work

Each module can be taken as a stand-alone course, and modules will build on each other. However, in order to qualify for the Advanced Resilient Leadership Certificate, participants are required to complete all four modules. The Resilient Leadership Certificate is not a pre-requisite to this Advanced program.

Why take this program?

Toxic workplace cultures are well-defined and ravaged workers are leaving in pursuit of better places to work. Would you like to make your culture the place everybody wants to join? Are you willing to run some experiments to improve your culture? Building a team has never been harder than it is right now, but every person's actions counts. You also do not need to be a formal leader with a fancy title to have a profound impact because change happens one person or moment at a time. Culture is always changing and evolving. Our job is to continually adapt, respond, learn, adjust, and keep going.

Who is this program designed for?

This program is an integrated set of reflections, and practical, applicable exercises for anyone interested in creating a culture where people can thrive and do their best work. If you want to get playful and learn some new ideas to invigorate energy and build more humane places to gather this series is for you. Each course "Starts at Start", and offers at least 10 useable ideas you can start using today.

» **LEARN MORE** Watch the [video](#).



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.

» WATCH

» How can you be a resilient leader? Watch this [interview](#) with Tammy Robertson.

» SAVE MORE

In each of these resilient leadership programs, register for all modules for a reduced price.



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.



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.



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.



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.



EI Experience

EI Experience is a corporate training company specializing in emotional intelligence, known for developing exceptional leaders who, in turn, achieve outstanding results through unparalleled innovation, solid fiscal performance, and extraordinary teamwork. Their courses allow participants to go on their emotional intelligence leadership journey at their own pace through an experiential, skills-based online experience that ensures participants can learn, practice, and apply what they learn to their jobs immediately.



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.



Garrett Wasny

Garrett Wasny, MA, CMC, CITP/FIBP is an independent digital skills advisor to accountants worldwide. His archived webinars focus on the intersection of accounting and technology, and provide guidance to practitioners on how to prosper in this dynamic age. The sessions demystify emerging cloud, mobile, and social applications, and explain in plain language how financial professionals can use these online tools to build trust, solve problems, and create new value. The presentations reveal how practitioners can build on their core knowledge as financial stewards and develop new digital competencies as strategic advisors, cross-domain thinkers, and integrated reporters.



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.



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.



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.



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.



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.



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.



UltimQuest Knowledge

UltimQuest Knowledge aims to improve organizational performance by delivering practical "how-to" corporate training on a variety of topics relevant to CPAs. Through live and online training, they provide courses in business ethics, governance, internal control, key performance indicators, leadership, and more. Their instructors are highly rated Canadian CPAs whose courses are designed to share their years of knowledge, experience, and business acumen through step-by-step guidance, personal experiences, and real-life examples. Their objective is to empower CPAs with useful insights to boost their career, and to help them become change-makers in their own organizations.



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-to-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 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.

IN-HOUSE PRESENTATION SERVICES

Making Corporate Training Happen

If your organization is looking for corporate training options, consider using CPABC PD In-House services. The majority of our courses have been converted to an online platform, but depending on the instructor, in-person presentations may also be available. Regardless of delivery format, we continue to provide relevant and timely training tailored to your group.

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 March 2022 and February 2023, we successfully provided virtual courses for our in-house clients in a safe and convenient environment



75+
sessions offered



2,100+
participants from
33 organizations
(industry & public practice)



4.3/5.0
average course rating



300+
seminar titles
to select from

Testimonials

“For the past several years we have had the CPABC In-House PD Program deliver a variety of ethics sessions to our conference attendees composed of finance professionals from the BC healthcare sector, in both in-person and virtual presentation formats. The sessions are very professional, informative, and interactive, and are greatly appreciated by our attendees. CPABC has also been very flexible in working with us to pivot from live to virtual conferences. CPABC In-House PD sessions have become a regular component of our annual conference, and we look forward to continuing to work with them in the future.”

Don Osborne CPA, CA,
BC Financial Healthcare Professionals Society (Voluntary)

“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, City of Kamloops

“With the avalanche of changes within our organization due to COVID-19, retirements, and evolving stakeholder needs, the need for office-wide training on change management had become apparent. We were fortunate to have the assistance of CPABC who helped us find an amazing facilitator to present a change management seminar in-house. The feedback from staff was excellent; they enjoyed the discussion and the exercises. We plan to continue to use CPABC as a resource for our training needs.”

Ilinca Manisali, CPA, CA, Pacific Salmon Commission

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.

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.

Learning Management System FAQ

We have been delivering our courses through a new learning management system (LMS) since May 2021. Here are some frequently asked questions about navigating the LMS.

I just registered for a course, but why is it not showing up in the LMS?

It takes approximately 15 minutes to sync up your registration to the LMS. Please check back a short time later, and email pdtechhelp@bccpa.ca if it does not appear after an hour.

I'm in the LMS now, but I'm not sure where to navigate to my course.

On the landing page, in the Upcoming Courses section, look for your course under one of the three tabs, Upcoming Live, Not Started, and In Progress. The course will be under one of these depending on the course start date or your progress. If you are looking for a course that is already completed, click into the Completed Courses section.

I registered for a live online seminar to be held via Zoom – how do I find the link to join the webinar?

After clicking into the course (from the steps above), click on the course title located below the Overview tab. This will expand the window and will display either a countdown clock, or a green Join the Webinar button. The Join the Webinar button will appear 15 minutes before the session start time – you can click on it to launch the Zoom meeting. Note that if you are taking a multi-day course, you will first need to select the appropriate session after the first day (Segment 2, 3 and so on) from the dropdown located above the Overview tab, before proceeding through the steps just mentioned.

I clicked on the Join the Webinar button but nothing happened – why didn't Zoom launch?

When you click Join the Webinar, Zoom should launch in another window. If it doesn't launch, check the pop-up blocker setting on your browser, and if it's turned on, please add our site to the allowed list. This also applies if you are using your mobile phone.

Where do I find the course materials?

Following the same steps to join the webinar, click instead on the Content tab next to the Overview tab – here you will be able to download any course materials where available. Please note that course materials (if any) are only made available two days before the course and up to 30 days after. All course materials are provided in electronic format only unless otherwise noted.

I've completed my course, where do I find a certificate of completion?

On the main Academy Page, click into the Completed Courses section. If a course was completed, a medal icon should be visible at the end of that row. Click on the medal icon to download your certificate. For live webinars, please allow one to three business days for your attendance status to be updated. For on-demand courses, you must pass the corresponding quizzes in order for your status to be marked complete. This certificate indicates only that you attended the course, and are eligible for up to the number of CPD hours indicated. If you arrived late, left early, or attended the course only partially for any reason, you must make the necessary adjustments while reporting your hours.

Pricing Update for Spring/Summer 2023

To continue to offer high quality, verifiable PD content and expanded course offerings, effective April 1, 2023 we are marginally increasing the price of various learning products within your PD Program in line with the rising costs of business. Since 2020, most PD products have been offered at a 20% discount. ***The new prices remain below pre-pandemic prices.*** Existing PD Passport holders will not be impacted by the pricing changes up to the expiry of current Passports on August 31, 2023.

» **READ** an expanded version of the [LMS FAQ](#) on our website or email pdtechhelp@bccpa.ca if you require assistance with the LMS.

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

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

CPABC will continue waiving our \$25 and \$50 cancellation fee on registrations to CPABC PD seminars held through to August 31, 2023. 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:

1. All Terms & Conditions specified here.
2. Have their name listed on class lists (not applicable to on-demand learning).
3. 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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