



Professional  
Development  
**ASCEND YOUR EXPERTISE**



## Fall/Winter 2021-2022

A peek into the near future: What your PD program has in store for you

CPABC PD's mission is to provide the highest quality professional development opportunities to meet the constantly evolving PD needs of our membership. And how the world has evolved! As the paths towards recovery and growth come into sharper focus, we are committed to providing the knowledge, skills, and tools to help our members climb upwards and onwards in the rebuilding process.

One important consideration in our fall/winter planning was the return to in-person classrooms. While we are pleased with the overall effectiveness of our online learning conversions, we also acknowledge that the benefits of in-person learning are essential to a portion of our membership.

We conducted a poll in June to assess how comfortable our members were to return to in-person learning, and the results from approximately 1,200 members showed 50% were comfortable with the return as long as necessary safety measures were in place, and 50% were either not comfortable or were not able to return to physical classrooms.

As such, the fall/winter PD program will be a hybrid of both online virtual as well as in-person courses. We want to ensure we offer sufficient options that make sense to the membership.

Recognizing the needs of our diverse membership, we have also focused our efforts on expanding not only course titles, but also choices in learning formats and environments. In addition to offering both online virtual and in-person learning opportunities, we have expanded our on-demand course titles, as well as scheduled more segmented live courses – breaking down longer courses into shorter sections that are spread out over multiple days.

You have access to a diverse, quality program – let us help you find what's right for you. See page 7 for a roadmap to help you navigate your PD pathway.

We have also introduced some great new titles into our inventory – see page 4 to discover newly added courses. We would also like to acknowledge our talented pool of instructors and speakers who, over the past year and half, have put time and effort into converting content designed for in-person instruction into effective online learning. Meet some of our instructors and get to know them better! See page 8.

And we would also like to thank you, our members, for continuing to support your CPABC PD program.

Your CPABC Professional Development Team

### Your Fall 2021 - Winter 2022 PD Program

#### A SIZEABLE & DIVERSE INVENTORY

**460+** LIVE SEMINARS

**395+**

Online Virtual

**65+**

In-Person

**385+**

ON-DEMAND SEMINARS

**250+**

Seminar Titles

**25+**

**NEW** Seminar Titles

#### QUALITY LEARNING OPPORTUNITIES

**4.24/5**

Average Course Rating  
Sep 2020-Jul 2021

**4.90/5**

Highest Course Rating  
Sep 2020-Jul 2021

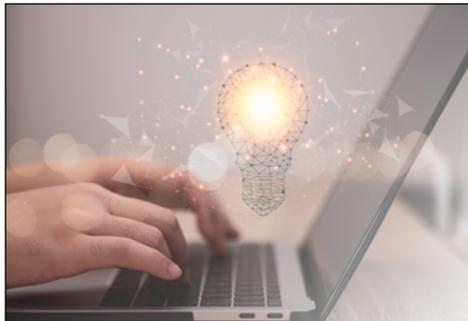
Feedback based on

**23,000**

registrations



75 | PD Passports



88 | Certificate Programs



93 | In-House Presentations

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## NEW Seminars for Fall/Winter 2021-22

### Accounting & Assurance

- ASNFPO - Update 2021
- ASPE - Statement of Cash Flows
- ASPE Stock Based Compensation 3870
- Audit Engagements - Auditing Accounting Estimates (CAS 540) Revised Standard
- Audit Engagements - Overview of CAS 315 Revised Standard
- Implementation of Internal Controls in the SME Context
- Other Engagements - Agreed Upon Procedures (CSRS 4400) New Standard
- Quality Management - Impacts of CSQM 1 and 2 for Providers of Assurance Services New Standards
- Quality Management - Impacts of CSQM 1 and 2 for Providers of Compilation and Other Non-Assurance Services Ne
- Quality Management - Overview of CSQM 1 and 2 for Providers of Assurance Services New Standards

### Technology, Innovation & Strategy

- 3 Ways Digital Transformation is Reinventing Accounting
- Creating Financial Statements in Excel Power Pivot

- ERP Selection and Implementation
- Health Check for Your Financial Systems and Processes
- Internet of Things for Accountants
- Mergers and Acquisitions - Aligning your Financial Systems, Processes & People
- Next Generation Excel Reporting

### Management & Ethics

- Building and Managing Successful Business Relationships
- Building Your Leadership Brand
- Leading Professional Teams - Successfully Transitioning from Professional Expert to Team Leader
- Professional Ethics for Career and Life Success

### Public Practice Management

- Branding & Marketing for Small Business
- Digital Marketing Essentials for Accountants

### Taxation

- GST/HST - Update 2021
- Income Tax - Employee vs. Contractor
- Income Tax - Salary vs. Dividends



## Leadership Certificate Program for Women

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

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

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

» **LEARN MORE, SAVE MORE** See page 76 for how you can save money by purchasing a [PD Passport](#)



## Introducing CPABC MyLearn

Your new learning management system (LMS)

A learning management system (LMS) is an application that manages the hosting, administration, and tracking of courses, training, and other learning programs.

CPABC MyLearn, launched in May 2021, is your new LMS platform. It is now the access point for all CPABC PD training. From accessing course materials and joining live webinars, viewing recorded videos and other on-demand learning, through to completing quizzes and receiving certificates, the MyLearn platform will allow you to complete your learning activities more efficiently.

### Benefits of the LMS

- Visually enhanced interface for navigation and access to courses.
- Ability to incorporate video tutorials, illustrative graphics, and other multi-media tools for more effective instruction and information.
- More consistent learning environment where all learning activities, including partner products, can be accessed.
- Convenience of a single login and password versus multiple access data for different partner sites.
- Better live webinar experience where live video presentations and seminar materials reside in the same location.
- Enhanced on-demand learning with more features like progressive learning and self-tracking, resulting in more structured learning environments.

### Frequently Asked Questions & Tips

Have specific questions on how to use the LMS? Here are some quick resources to help you navigate the system.



#### Frequently Asked Questions



#### Navigational Tour



#### Did you know?

87%

of learners use some form of LMS for their online learning needs



## Get ready for four great virtual PD Nexus Days!

Our timely and relevant PD Nexus Days are back virtually this fall:

In conjunction with the Society of Trust and Estate Practitioners Canada (STEP), Vancouver Branch, we are excited to bring back **Estate Planning Insights** (Oct 26) – a day that will feature recent developments of interest in tax and estate planning.

Public practitioners, learn and share best practices on surviving and thriving in public practice at our **Public Practice Insights** (Nov 9).

And local government finance professionals, get ready for another forum to discuss issues facing local government entities today - attend the **Local Government Accounting & Auditing Workshop** (Nov 18-19).

And our fall Nexus season will conclude with **Business & Innovation Insights** (Dec 7). This value-packed day will also offer three breakout streams for attendees to choose from.

» **READ MORE** About our Fall/Winter [Nexus Days](#) offerings on page 77.

In June, we polled members on how they felt about a return to in-person learning in the fall.



**50%**

**Comfortable** as long as vaccination complete and necessary safety protocols in place



**47%**

**Not ready** to attend in-person regardless of vaccination and safety protocols



**3%**

**Comfortable but not able** to attend in-person due to other personal concerns

Your fall/winter 2021-2022 seminars will consist of approximately



**15%**

In Person



**85%**

Online Virtual

We will abide by all on-going public health and safety restrictions until otherwise lifted. As government COVID mandates are constantly evolving, CPABC may update our in-person event requirements whenever necessary to meet provincial guidelines.

- Health and safety guidelines apply to all in-person seminars – registrants must agree to comply with these guidelines before completing their registration.
- Registrants should stay home if they are unwell.
- Should health authorities once again restrict in-person gatherings, conversion to virtual offering will be made whenever possible.

## Quality PD at your fingertips – where do you begin?

CPABC PD is proud to offer a wide array of professional development opportunities to meet the needs of a diverse membership. **But what works best for you?** Here, we'll break down all the different learning opportunities available to help you begin, or enhance, your PD experience.

Are you looking for an **immersive and in-depth** learning experience to take your career to the next level?

### EXECUTIVE PROGRAMS



Transformative and in-depth multi-day programs designed to fast-track the careers of controllers, CFOs, CEOs, and other senior managers.

**9** programs offered  
**4.58/5** overall rating

[» READ MORE](#)

Are you looking for **live courses** on specific technical or personal development topics and...

...are **comfortable with technology** but find commuting a challenge?

### ONLINE VIRTUAL SEMINARS



Courses on diverse technical and business topics, thoughtfully retooled to be offered via Zoom – the definition of virtual classrooms. Varied lengths and split days available.

**650+** offerings a year  
**4.26/5** overall rating

[» READ MORE](#)

...prefer being in a **physical classroom** as it's your optimal learning environment?

### IN-PERSON SEMINARS



Traditional classroom courses on diverse technical and business topics – greatest opportunity to interact with instructors and peers. Varied lengths available.

**50+** offerings a year\*  
**4.21/5** overall rating

\*Based on 2020-21 numbers – will increase in 2022. [» READ MORE](#)

Do you prefer **shorter sessions** of similar-themed or linked topics, presented together in a value-packed day?

### PD NEXUS DAYS



Multiple short sessions throughout the day, includes plenaries and your choice of breakout topics. Create your own ideal package.

**6-7** Nexus Days a year  
**4.23/5** overall rating

[» READ MORE](#)

Do you want to acquire specialized knowledge and skills in a specific area, and can commit to completing a **set number of courses?**

### CERTIFICATE PROGRAMS



Group of seminars designed to provide substantive knowledge in a core topic. Certificate issued once all necessary seminars are completed.

**3** programs offered  
(see also Executive Programs)  
**4.27/5** overall rating

[» READ MORE](#)

Are you looking to boost your knowledge through courses tailored to accounting and finance professionals, but prefer to complete them at **your own time and pace?**

### ONLINE ON-DEMAND SEMINARS



Archived recordings and webinars specifically designed for online self-study. Rich inventory of titles from CPABC and third-party providers. Varied lengths available.

**360+** titles offered  
**4.26/5** overall rating

[» READ MORE](#)

## Meet some of *your* great instructors!



**TEJINDER BASU**

is the founder and CEO of Cyberium Consulting and has over 30 years of experience in business leadership, IT consulting, audit, and cybersecurity across Europe and North America.



**CHRIS ROWELL,**

PhD, is a manager at Cyberium Consulting and a postdoctoral research and teaching fellow at UBC Sauder School of Business and Blockchain@UBC.



**TERRY SMALL, B.Ed.,**

M.A., is a master teacher and Canada's leading learning skills specialist. He is the author of the Brain Bulletin with over 35,000 subscribers worldwide. Terry often appears on TV, radio, and in the press. He recently appeared on BCTV, Global, CKNW, and Student Success.

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Read Terry's article [Reduce brain stress with the best tip ever](#) and listen to our  [podcast](#) episode with Terry.

Hear from Terry directly at the upcoming seminars [Brain Focus, Triple Your Reading Speed](#), and [Wiring Your Brain for High Impact Leadership](#) this fall.



**CORINNE IMPEY** is a

senior communications professional and entrepreneur. She provides strategic advice and communications coaching to leaders and teams across Canada. Corinne holds a masters of professional communication degree from Ryerson University and is the recipient of a Gold Quill Excellence Award from the International Association of Business Communicators for her work in change communication.

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Read Corrine's article [Clear, concise, consistent - The three Cs of effective communication](#).

Corinne will be instructing the new courses [Branding & Marketing for Small Business](#), and [Digital Marketing Essentials for Accountants](#) this fall.



**DAN EISNER, CPA, CA,** is

an employee benefits advisor at ZLC Financial. Dan's passion is working with human resource and finance professionals who share the belief there is a better way for employee benefits and broader workforce planning strategies. The results for his clients are affordable employee benefits plans that are sustainable, and relevant to their employees and therefore their business strategies.

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Read Dan's article [Understanding the financial risks of employee benefits](#).

He will be instructing [Understanding the Financial Risks of Employee Benefits](#) this fall.

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Read Tejinder's and Chris' article [It's not you, it's blockchain](#).

They will be presenting Foundations of Blockchain and Blockchain Essentials for CPAs this fall. See more [courses on blockchain](#).

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



**LAURA FRIEDRICH, MSc, CIA, FCPA, FCGA**, is a principal of *friedrich & friedrich corp*, a professional research, standards, and education consultancy firm and has over 20 years' experience conducting projects worldwide. Laura currently serves on CPABC's Bylaws Committee and as a technical advisor to the International Ethics Standards Board for Accountants.

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Read Laura's article [CPAs and AI: Adding value through ethical leadership](#).

Laura will be instructing these [ethics courses](#) in the fall.



**AGAPI GESSESSE**, is an award-winning, powerful, influential, and fearless change-maker. She speaks and writes on topics such as anti-black racism, workforce development and youth engagement, and currently serves as the Executive Director of CEE Centre for Young Black Professionals.

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Listen to Agapi's [podcast](#) episode on bringing racial diversity to corporate Canada..

A [Diversity, Equity and Inclusion](#) stream will be available at this fall's **PD Nexus: Business & Innovation Insights**.



**GLEN SOLLORS** is a partner at Kwela, and has over 20 years' experience in driving results by working with leaders in developing strategic business opportunities, managing associated change and enabling team success. His big picture and authentic approach helps leaders uncover possibilities within themselves and others.

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Read Glen's article [Are you burned out?](#) and listen to his [podcast](#) episode.

Hear from Glen directly at our upcoming seminar [Leading Self and Emotional Intelligence](#) this fall.



**CAROLYN STERN**, a professor with the School of Business at Capilano University, pioneered the integration of emotional intelligence into Capilano's curriculum. An EI and leadership development expert, Carolyn combines real-world experience as both a business leader with more than two decades as a trainer and educator. Her company, EI Experience, provides leadership development and EI training for all management levels and businesses of all sizes.

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Read Carolyn's article on [How to engage your virtual team using emotional intelligence](#). Carolyn is a frequent presenter at PD Nexus Days.

<b>ACCOUNTING &amp; ASSURANCE</b>
<b>Audit &amp; Assurance</b>
Financial Reporting
Management Accounting
<b>ETHICS</b>
<b>FINANCE &amp; ECONOMICS</b>
Business Valuations
Corporate Finance
Financial Modelling
<b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b>
Communication & Negotiation
Self Management & Wellness
Teamwork & Leadership
Resilient Leadership Certificate Program
<b>PRACTICE MANAGEMENT</b>
<b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b>
Risk Management & Fraud
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Strategic & Advanced Strategic Management Certificate Programs
<b>TAXATION</b>
Commodity Tax
Corporate & Personal Tax
Not-For-Profit Organizations
Trusts & Estates
US & International Taxation
<b>TECHNOLOGY &amp; INNOVATION</b>
Business Transformation & Emerging Issues
Software & Tools
<b>WEALTH MANAGEMENT</b>
<b>PD NEXUS DAYS</b>

## ACCOUNTING & ASSURANCE

### AUDIT & ASSURANCE

<p><b>Assurance - Compliance with Agreements, Statutes, and Regulations</b></p> <p>This seminar covers the CPA Canada Handbook requirements for engagements to audit or review compliance of financial or non-financial information with agreements, statutes, laws or regulations. Common reports include reports on compliance. Participants will gain a comprehensive overview of compliance standards CSAE 3530 and 3531 including performance and reporting requirements with illustrative examples.</p>		3.5 hours	Online On-demand Only
<p><b>Audit Engagements - Audit of a Simple Entity</b></p> <p>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.</p>	Nov-01	9am-5pm	Live Webinar
	<i>Online On-demand available</i>		
<p><b>NEW Audit Engagements - Auditing Accounting Estimates and Related Disclosures (CAS 540) Revised Standard</b></p> <p>This course will provide an overview of Revised CAS 540 Auditing Accounting Estimates and Related Disclosures. Required risk assessment procedures, guidance on the three possible testing approaches in performing further audit procedures on accounting estimates, assessing inherent and control risk, performing stand-back procedures, incorporating professional skepticism, and meeting documentation will all be addressed. Participants will be able to identify the auditor's responsibilities and apply the standards when designing and performing procedures for audit engagements.</p>	Nov-01 Feb-18	9am-11am 9am-11am	Live Webinar Live Webinar
	<i>Online On-demand available</i>		

# SEMINAR SCHEDULE CATEGORY & TITLE

Category	Topic	Date	Time	Format	
<b>ACCOUNTING &amp; ASSURANCE</b> <b>Audit &amp; Assurance</b> Financial Reporting Management Accounting  <b>ETHICS</b>  <b>FINANCE &amp; ECONOMICS</b> Business Valuations Corporate Finance Financial Modelling  <b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b> Communication & Negotiation Self Management & Wellness Teamwork & Leadership Resilient Leadership Certificate Program  <b>PRACTICE MANAGEMENT</b>  <b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b> Risk Management & Fraud Strategy, Governance, & Human Resource Strategic & Advanced Strategic Management Certificate Programs  <b>TAXATION</b> Commodity Tax Corporate & Personal Tax Not-For-Profit Organizations Trusts & Estates US & International Taxation  <b>TECHNOLOGY &amp; INNOVATION</b> Business Transformation & Emerging Issues Software & Tools  <b>WEALTH MANAGEMENT</b>  <b>PD NEXUS DAYS</b>	<b>NEW Audit Engagements - Overview of CAS 315 Revised Standard</b> This seminar will review key changes and introduce the extensive application material in the revised CAS 315, Identifying and Assessing the Risks of Material Misstatement standard which is effective for audits of financial statements for periods beginning on or after December 15, 2021. Participants will build on their experience of planning an audit and be able to identify and develop an approach for the implementation of CAS 315 in their practice.	Oct-21  Nov-29 Nov-30 Jan-21 Feb-09	9am-12:30pm  9am-12:30pm 1:30pm-5pm 9am-12:30pm 9am-12:30pm	<b>In-Person, Vancouver</b> Live Webinar Live Webinar Live Webinar <b>In-Person, Vancouver</b>	
	<b>Audit Engagements - Review of the Standards</b> This seminar provides a foundation in the practical application of the Canadian Auditing Standards (CAS) to audit engagements. Using a case study approach, the course reviews key CAS 540 – Accounting Estimates and Related Disclosures and examines areas identified as common pitfalls by CPA national practice inspection findings.	Two segments Nov-23 & Nov-24	9am-5pm	Live Webinar	
	<b>Audit Engagements - Risk Related to Fraud CAS 240</b> The requirements of CAS 240 are designed to assist the auditor in identifying and assessing the risk of material misstatement due to fraud and in designing procedures to detect and respond to such misstatements. Through the use of discussion, case studies, and examples, participants will be able to identify the auditor’s responsibilities related to fraud and apply the standards when designing and performing procedures for audit engagements.	Nov-26	9am-12:30pm	Live Webinar	
					<i>Online</i> <i>On-demand available</i>
					<i>Online</i> <i>On-demand available</i>
					<i>Online</i> <i>On-demand available</i>
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	<b>Compilation Engagements - Application of the New CSRS 4200</b> This course will update practitioners on the new standard for compilation engagements (CSRS 4200) so that they will have a working knowledge of the standard for application in their practices. This seminar will include hands-on opportunities to review application of the standard in different scenarios and comparison to the previous standard to other non-assurance standards.	Oct-15  Oct-22 Nov-08 Nov-24 Nov-30 Dec-10	9am-5pm  9am-5pm 9am-5pm 9am-5pm 9am-5pm	<b>In-Person, Vancouver</b> Live Webinar Live Webinar Live Webinar Live Webinar Live Webinar <b>In-Person, Vancouver</b> Live Webinar Live Webinar
	<b>Compilation Engagements - Overview of the New Standard (CSRS 4200)</b> The new compilation engagement standard, Canadian Standard for Related Services (CSRS) 4200, has some significant differences from the previous standard. This seminar will provide a detailed overview of this new standard and its impact on the planning, implementation, and documentation of a compilation engagement.	Oct-28 Dec-02 Feb-25	9am-12:30pm 9am-12:30pm 9am-12:30pm	Live Webinar Live Webinar Live Webinar  <i>Online</i> <i>On-demand available</i>

## SEMINAR SCHEDULE CATEGORY & TITLE

Category	Title	Duration	Delivery Method
<b>ACCOUNTING &amp; ASSURANCE</b> <b>Audit &amp; Assurance</b> Financial Reporting Management Accounting  <b>ETHICS</b>  <b>FINANCE &amp; ECONOMICS</b> Business Valuations Corporate Finance Financial Modelling  <b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b> Communication & Negotiation Self Management & Wellness Teamwork & Leadership Resilient Leadership Certificate Program  <b>PRACTICE MANAGEMENT</b>  <b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b> Risk Management & Fraud Strategy, Governance, & Human Resource Strategic & Advanced Strategic Management Certificate Programs  <b>TAXATION</b> Commodity Tax Corporate & Personal Tax Not-For-Profit Organizations Trusts & Estates US & International Taxation  <b>TECHNOLOGY &amp; INNOVATION</b> Business Transformation & Emerging Issues Software & Tools  <b>WEALTH MANAGEMENT</b>  <b>PD NEXUS DAYS</b>	<b>Compilation Engagements - Review of Section 9200</b> This seminar provides an overview of the existing CPA Canada Handbook – Assurance Section 9200 relevant to compilation engagements, with practical examples of different approaches to completing and documenting compilation engagements. Scenario-based exercises will assist participants in developing their understanding, including appropriate disclosures in compiled financial statements, CPA Code of Professional Conduct concepts such as association with false and misleading information and independence, and assessing what documentation is necessary to support a compilation engagement file.	3.5 hours	Online On-demand Only
	<b>NEW Other Engagements - Agreed Upon Procedures (CSRS 4400) New Standard</b> This course provides participants with an overview of the requirements of the new Canadian Standard for Related Services (CSRS) 4400 and its impact on the planning, implementation, and documentation of an Agreed-Upon Procedures engagement. Participants will be able to identify what is covered in the standard such as the use of professional judgment in an agreed-upon procedures engagement, using the work of a practitioner’s expert and undertaking an agreed-upon procedures engagement together with another engagement.	2 hours	Online On-demand Only  (Available late fall)
	<b>Quality Control - Review of CSQC 1 (Current Standard)</b> This seminar is designed to assist sole practitioners and small firms in understanding the requirements of the quality control standards as set out in Canadian Standards of Quality Control (CSQC 1) and how the requirements may be applied in a small firm environment. The seminar is structured based on the CPA Canada Quality Assurance Manual subscription, however the topics and ideas may be integrated into any customized firm template.	3.5 hours	Online On-demand Only

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<b>ACCOUNTING &amp; ASSURANCE</b> <b>Audit &amp; Assurance</b> Financial Reporting Management Accounting  <b>ETHICS</b>  <b>FINANCE &amp; ECONOMICS</b> Business Valuations Corporate Finance Financial Modelling  <b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b> Communication & Negotiation Self Management & Wellness Teamwork & Leadership Resilient Leadership Certificate Program  <b>PRACTICE MANAGEMENT</b>  <b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b> Risk Management & Fraud Strategy, Governance, & Human Resource Strategic & Advanced Strategic Management Certificate Programs  <b>TAXATION</b> Commodity Tax Corporate & Personal Tax Not-For-Profit Organizations Trusts & Estates US & International Taxation  <b>TECHNOLOGY &amp; INNOVATION</b> Business Transformation & Emerging Issues Software & Tools  <b>WEALTH MANAGEMENT</b>  <b>PD NEXUS DAYS</b>	<b>NEW Quality Management - Impacts of CSQM 1 and 2 for Providers of Assurance Services (New Standards)</b> This seminar will help assurance practitioners understand the International Standards on Quality Management (ISQM) 1 and 2, which are proposed to replace CSQC 1. ISQM 1 provides a new approach to quality management at the firm level, including guidance on a risk assessment process and ISQM 2 provides guidance on engagement quality reviews. Participants' understanding of the new approach will allow them to identify and address risks to their practice and get a head start on compliance.	1 hour	Online On-demand Only  (Available late fall)
	<b>NEW Quality Management - Impacts of CSQM 1 and 2 for Providers of Compilation and Other Non-Assurance Services (New Standards)</b> This seminar will provide non-assurance practitioners who perform compilations with an understanding of the International Standards on Quality Management (ISQM) 1 and 2 which are proposed to replace CSQC 1. The standard sets out what is needed in a firm's quality control systems to achieve quality objectives and manage risk and provides guidance on engagement quality reviews.	1 hour	Online On-demand Only  (Available late fall)
	<b>NEW Quality Management - Overview of CSQM 1 and 2 for Providers of Assurance Services (New Standards)</b> This course reviews the requirements of the new Canadian Standard for Quality Management (CSQM 1 and CSQM 2), related amendments to Canadian Auditing Standards (CAS 220), and impact on the quality control processes for assurance practitioners. The course provides a map of the decisions that will need to be made and the changes, if any, required to ensure current quality control processes and procedures are compliant with the new standards.	Nov-05 Jan-27  <i>Online</i> <i>On-demand</i> <i>available</i>	9am-12:30pm 9am-12:30pm

## SEMINAR SCHEDULE CATEGORY & TITLE

<b>ACCOUNTING &amp; ASSURANCE</b> <b>Audit &amp; Assurance</b> <b>Financial Reporting</b> Management Accounting	<b>Review Engagements - Application of the Standard</b> Using a case study approach, this course allows those already familiar with CSRE 2400 - Review Engagements to deepen their knowledge of the standard and its application. Participants will learn to optimize the planning of the engagement, develop strategies for key steps, and identify issues related to the implementation of the requirements.	Nov-22	9am-5pm	<b>In-Person, Vancouver</b>
		<i>Online</i> <i>On-demand available</i>		
<b>ETHICS</b>				
<b>FINANCE &amp; ECONOMICS</b> Business Valuations Corporate Finance Financial Modelling	<b>Review Engagements - Specific Topics</b> This course builds upon fundamental knowledge of the CSRE 2400 - Review Engagements Standards and addresses areas that commonly prove more challenging for practitioners. Participants will gain a deeper understanding of how to quickly identify incomplete review engagement documentation and apply the necessary changes to resolve outstanding issues.	Nov-08	9am-5pm	Live Webinar
<b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b> Communication & Negotiation Self Management & Wellness Teamwork & Leadership Resilient Leadership Certificate Program				
<b>PRACTICE MANAGEMENT</b>				
<b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b> Risk Management & Fraud Strategy, Governance, & Human Resource Strategic & Advanced Strategic Management Certificate Programs	<b>ASNFPO - Disclosure and Presentation</b> This seminar will serve as a review and refresher of the disclosure and presentation requirements of Accounting Standards for Not-for-Profit Organizations (ASNFPO) as well as the most common Accounting Standards for Private Enterprises (ASPE) standard applicable to not-for-profit organizations. Participants will learn the options available when setting accounting policies and the impacts on disclosure.	Dec-01	9am-5pm	Live Webinar
<b>TAXATION</b> Commodity Tax Corporate & Personal Tax Not-For-Profit Organizations Trusts & Estates US & International Taxation				
<b>TECHNOLOGY &amp; INNOVATION</b> Business Transformation & Emerging Issues Software & Tools	<b>ASNFPO - Review of the Standards</b> This seminar will discuss the application of NFPO accounting standards, with an emphasis on areas where choice exists in Part III - Accounting Standards for Not-for-Profit Organizations (ASNFPO) and relevant sections of Part II - Accounting Standards for Private Enterprises (ASPE). Participants will learn what options are available when selecting policies and their impacts on disclosure, and how to determine the appropriate accounting treatment given different facts and scenarios.	Nov-04	9am-5pm	Live Webinar
<b>WEALTH MANAGEMENT</b>				
<b>PD NEXUS DAYS</b>				

### FINANCIAL REPORTING

# SEMINAR SCHEDULE CATEGORY & TITLE

Category	Topic	Date	Time	Format
ACCOUNTING & ASSURANCE Audit & Assurance	<b>NEW ASNFPPO - Update 2021</b> This seminar will provide an information update on recent revisions to the CPA Canada Handbook – Part III, Accounting Standards for Not-for-Profit Organizations (ASNFPPO). In addition, revisions will be discussed to Part II, Accounting Standards for Private Enterprises (ASPE) where they are applicable to NFPOs. Participants will be able to utilize this information on proposed changes to the standards to provide guidance to NFPOs and board members.	Nov-15	9am-11am	Live Webinar
		Dec-03	9am-11am	Live Webinar
		Mar-04	9am-11am	Live Webinar
		<i>Online On-demand available</i>		
FINANCIAL REPORTING Management Accounting	<b>ASPE - Comparison to IFRS</b> This seminar examines the major differences between Part II - Accounting Standards for Private Enterprises (ASPE) and Part I - International Financial Reporting Standards (IFRS). It will highlight major similarities and significant differences between the two sets of standards.	Two segments Nov-18 & Nov-19	8:30am-12:30pm	Live Webinar
		<i>Online On-demand available</i>		
PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT Communication & Negotiation Self Management & Wellness Teamwork & Leadership Resilient Leadership Certificate Program	<b>ASPE - Construction Industry</b> 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.	Nov-22	9am-12:30pm	Live Webinar
		Feb-03	9am-12:30pm	Live Webinar
		<i>Online On-demand available</i>		
PRACTICE MANAGEMENT	<b>ASPE - Disclosure and Presentation</b> 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.	Nov-19	9am-5pm	Live Webinar
		Two segments Jan-26 & Jan-27	8:30am-12:30pm	Live Webinar
		<i>Online On-demand available</i>		
STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE Risk Management & Fraud Strategy, Governance, & Human Resource Strategic & Advanced Strategic Management Certificate Programs				
TAXATION Commodity Tax Corporate & Personal Tax Not-For-Profit Organizations Trusts & Estates US & International Taxation				
TECHNOLOGY & INNOVATION Business Transformation & Emerging Issues Software & Tools				
WEALTH MANAGEMENT				
PD NEXUS DAYS				

# SEMINAR SCHEDULE CATEGORY & TITLE

Category	Title	Dates	Time	Format
ACCOUNTING & ASSURANCE Audit & Assurance	<b>ASPE - Real Estate Industry</b> 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.	Oct-25	9am-5pm	Live Webinar
		Dec-07	9am-5pm	<b>In-Person, Vancouver</b>
FINANCIAL REPORTING Management Accounting		Two segments Feb-07 & Feb-08	8:30am-12:30pm	Live Webinar
ETHICS				
FINANCE & ECONOMICS Business Valuations Corporate Finance Financial Modelling				Online On-demand available
PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT Communication & Negotiation Self Management & Wellness Teamwork & Leadership Resilient Leadership Certificate Program	<b>ASPE - Related Party Transactions</b> Accounting for related party transactions is a complicated area to apply Accounting Standards for Private Enterprises (ASPE) and it is an area of accounting regularly cited for deficiencies by practice inspection. This seminar will address challenges that can arise with respect to the recognition, measurement, presentation, and disclosure of related party transactions and balances under ASPE.	Dec-13	9am-5pm	Live Webinar
PRACTICE MANAGEMENT				
STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE Risk Management & Fraud Strategy, Governance, & Human Resource Strategic & Advanced Strategic Management Certificate Programs	<b>ASPE - Review of the Standards</b> 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 Nov-26 & Nov-27 Feb-23 & Feb-24	8:30am-5pm  8:30am-5pm	Live Webinar  Live Webinar
TAXATION Commodity Tax Corporate & Personal Tax Not-For-Profit Organizations Trusts & Estates US & International Taxation				Online On-demand available
TECHNOLOGY & INNOVATION Business Transformation & Emerging Issues Software & Tools	<b>NEW ASPE - Statement of Cash Flows</b> This seminar provides participants with an overview of the preparation of the statement of cash flow, including discussion of the standard and exercises involving the preparation of a statement of cash flow under the direct and indirect method. The seminar covers basic cash flow statements and additional complexities, including non-cash transactions, foreign exchange, definition of cash and cash equivalents, and determination of adjustments to operating activities.		2 hours	Online On-Demand Only  (Available late fall)
WEALTH MANAGEMENT				
PD NEXUS DAYS				

# SEMINAR SCHEDULE CATEGORY & TITLE

<b>ACCOUNTING &amp; ASSURANCE</b>	<b>NEW ASPE - Stock-Based Compensation 3870</b>	2 hours	Online On-Demand Only
Audit & Assurance	<p>This seminar focuses on the areas of financial reporting of stock-based compensation that are widely experienced in private enterprises. The seminar starts with a discussion on how to determine and account for stock-based compensation based on illustrative examples and a comprehensive exercise. Participants will better understand the requirements of the ASPE standards through discussion, exercises that introduce complexities, and a comprehensive exercise to illustrate the concepts discussed.</p>		(Available late fall)
<b>Financial Reporting</b>			
Management Accounting			
<b>ETHICS</b>			
<b>FINANCE &amp; ECONOMICS</b>			
Business Valuations			
Corporate Finance			
Financial Modelling			
<b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b>	<b>ASPE - Strategic Investments</b>	7 hours	Online On-Demand Only
Communication & Negotiation	<p>This course examines choices regarding accounting for strategic investments, including subsidiaries, and significantly influenced investees or investments in joint arrangements relating to ASPE 1591, 3051, and 3856. The examination will include the impact on recognition, measurement, presentation, and disclosure of the choices. Participants will learn to evaluate the nature of strategic investments and apply the correct accounting method, including when to choose to account for controlled subsidiaries or significantly influenced investees at cost.</p>		
Self Management & Wellness			
Teamwork & Leadership			
Resilient Leadership			
Certificate Program			
<b>PRACTICE MANAGEMENT</b>			
<b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b>	<b>ASPE - Update 2021</b>	Oct-19	8:30am-12:30pm Live Webinar
Risk Management & Fraud	This seminar will review recent revisions to Part II – ASPE, including specific examples detailing their implementation.	Oct-30	9am-12:30pm <b>In-Person, Vancouver</b>
Strategy, Governance, & Human Resource	<p>Participants will receive practical guidance on revenue recognition, implications of COVID-19 on financial reporting, status of AcSB projects on financial statement concepts, combinations under common control and asset acquisitions, and common deficiencies in ASPE financial statements.</p>	Nov-16	8:30am-12:30pm Live Webinar
Strategic & Advanced Strategic Management		Dec-09	8:30am-12:30pm Live Webinar
Certificate Programs		Feb-01	8:30am-12:30pm Live Webinar
<b>TAXATION</b>			
Commodity Tax			
Corporate & Personal Tax			
Not-For-Profit Organizations			
Trusts & Estates			
US & International Taxation			
<b>TECHNOLOGY &amp; INNOVATION</b>			
Business Transformation & Emerging Issues			
Software & Tools			
<b>WEALTH MANAGEMENT</b>			
<b>PD NEXUS DAYS</b>			

# SEMINAR SCHEDULE CATEGORY & TITLE

Category	Title	Date	Time	Format
<b>ACCOUNTING &amp; ASSURANCE</b> Audit & Assurance <b>Financial Reporting</b> Management Accounting	<b>Compiling Financial Statements</b> This course explores fundamental accounting concepts, as well as corporate tax concepts, that serve as a background for determining an appropriate basis of accounting for compiling financial statements. This course also serves as an introduction to the financial reporting concepts included in the CPA Handbook – Accounting.	Dec-03	9am-12:30pm	Live Webinar
	<b>IFRS - Disclosure and Presentation</b> This seminar will provide participants with an overview of Part I – International Financial Reporting Standards (IFRS) related specifically to the presentation of all the statements and related note disclosures for all areas.	4 segments Oct-25, Oct-26, Oct-27 & Oct-28	9am-12:30pm	Live Webinar
<b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b> Communication & Negotiation Self Management & Wellness Teamwork & Leadership Resilient Leadership Certificate Program	<b>IFRS - Essentials</b> This seminar provides participants who want to know about IFRS, but do not have to implement the standards and understand all of the technical details, with an understanding of the essentials of Part I - International Financial Reporting Standards (IFRS). The course delivers an examination on the types of entities using IFRS, impact on development of ASPE, key concepts, conceptual framework, description of IFRS terminology, and basics of IFRS financial statements.	Nov-05	9am-12:30pm	Live Webinar
	<b>IFRS - Mining Industry</b> This course will provide an overview of the common accounting issues that arise in the mining industry under IFRS standards. Following the life cycle of a mineral project from exploration to mine closure, the course will look at the accounting issues and judgments that apply in each phase of activity. The course provides examples allowing participants to identify issues that are relevant in each stage.	Oct-04	9am-5pm	Live Webinar
<b>FINANCE &amp; ECONOMICS</b> Business Valuations Corporate Finance Financial Modelling				
<b>PRACTICE MANAGEMENT</b>				
<b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b> Risk Management & Fraud Strategy, Governance, & Human Resource Strategic & Advanced Strategic Management Certificate Programs				
<b>TAXATION</b> Commodity Tax Corporate & Personal Tax Not-For-Profit Organizations Trusts & Estates US & International Taxation				
<b>TECHNOLOGY &amp; INNOVATION</b> Business Transformation & Emerging Issues Software & Tools				
<b>WEALTH MANAGEMENT</b>				
<b>PD NEXUS DAYS</b>				

# SEMINAR SCHEDULE CATEGORY & TITLE

Category	Title	Format	Dates	Time	Location
<b>ACCOUNTING &amp; ASSURANCE</b> Audit & Assurance <b>Financial Reporting</b> Management Accounting	<b>IFRS - Review of the Standards</b> 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.	4 segments <i>Online</i> <i>On-demand available</i>	Nov-22, Nov-23, Nov-24 & Nov-25	9am-12:30pm	Live Webinar
	<b>IFRS - Update 2021</b> This seminar provides participants with a review of new and revised IFRS between July 2020 and June 2021 and an up-to-date snapshot of other projects being considered by the IASB. This course updates the participants' knowledge of changes to IFRS and non-authoritative guidance that has been issued by the IFRS Interpretations Committee and the IFRS Discussion Group during the year.	Oct-28 Feb-17 <i>Online</i> <i>On-demand available</i>	8:30am-12:30pm 9am-12:30pm	Live Webinar <b>In-Person, Vancouver</b>	
	<b>IFRS 9 - Financial Instruments</b> This course is designed to teach participants the main provisions of the Part I - International Financial Reporting Standards (IFRS) 9, Financial Instruments and provide them with the necessary knowledge to apply it to their own financial instrument fact situation.	Dec-17 <i>Online</i> <i>On-demand available</i>	9am-5pm	Live Webinar	
<b>IFRS 15 - Revenue Recognition</b> Accurate revenue recognition reporting is necessary for internal and external reporting for all revenue producing companies to maintain investor and creditor confidence. The objective of this seminar is to provide participants with a practical understanding of the five-step revenue recognition framework under Part I - International Financial Reporting Standards (IFRS) 15, Revenue from Contracts with Customers, and how to apply it.	Dec-15 <i>Online</i> <i>On-demand available</i>	9am-5pm	Live Webinar		
<b>ETHICS</b>					
<b>FINANCE &amp; ECONOMICS</b> Business Valuations Corporate Finance Financial Modelling					
<b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b> Communication & Negotiation Self Management & Wellness Teamwork & Leadership Resilient Leadership Certificate Program					
<b>PRACTICE MANAGEMENT</b>					
<b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b> Risk Management & Fraud Strategy, Governance, & Human Resource Strategic & Advanced Strategic Management Certificate Programs					
<b>TAXATION</b> Commodity Tax Corporate & Personal Tax Not-For-Profit Organizations Trusts & Estates US & International Taxation					
<b>TECHNOLOGY &amp; INNOVATION</b> Business Transformation & Emerging Issues Software & Tools					
<b>WEALTH MANAGEMENT</b>					
<b>PD NEXUS DAYS</b>					

# SEMINAR SCHEDULE CATEGORY & TITLE

Category	Title	Format	Dates	Time	Delivery
ACCOUNTING & ASSURANCE Audit & Assurance	<b>IFRS 16 - Leases</b> IFRS 16 - Leases is now in effect and has significant impact for all companies with leases, particularly operating leases. This seminar provides an in-depth review of the new standard, including the objective and scope of the standard, defined terms, exemptions, and transitional requirements.	Two segments	Dec-01 & Dec-02	9am-12:30pm	Live Webinar
		<i>Online On-demand available</i>			
FINANCIAL REPORTING Management Accounting					
ETHICS					
FINANCE & ECONOMICS Business Valuations Corporate Finance Financial Modelling					
PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT Communication & Negotiation Self Management & Wellness Teamwork & Leadership Resilient Leadership Certificate Program					
PRACTICE MANAGEMENT					
STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE Risk Management & Fraud Strategy, Governance, & Human Resource Strategic & Advanced Strategic Management Certificate Programs	<b>PSAS - Review of the Standards</b> This workshop provides participants with an introduction to PSAS focusing on general concepts, the structure of the PSAS Handbook, and differences between PSAS and those of ASPE or IFRS. The workshop uses collaborative learning, industry examples, small case studies, and comparison of PSAS concepts with those in ASPE or IFRS to link relevant concepts to enhance participants' knowledge.	Two segments	Dec-02 & Dec-03	9am-12:30pm	Live Webinar
		<i>Online On-demand available</i>			
	<b>PSAS - Specific Topics</b> This workshop examines the application of complex areas in PSAS, starting with an overview of the more recent standards and changes to come, including Asset Retirement Obligations. The workshop explores common areas of complexity that appear frequently in practice that raise discussions between finance professionals and auditors using mini-case studies, shorter collaborative discussion exercises, and real-world examples.	Two segments	Dec-08 & Dec-09	9am-5pm	Live Webinar
		<i>Online On-demand available</i>			
TAXATION Commodity Tax Corporate & Personal Tax Not-For-Profit Organizations Trusts & Estates US & International Taxation	<b>PSAS - Update 2021</b> This seminar provides a review of sections in the PSA Handbook that have recently undergone addition, including pending sections, along with ongoing key projects and activities of the PSA Board. Background information and examples will be provided to allow participants to better position themselves to plan for the changes and to advise others.	Nov-17 Nov-25		9am-12:30pm 9am-12:30pm	<b>In-Person, Vancouver</b> Live Webinar
		<i>Online On-demand available</i>			
TECHNOLOGY & INNOVATION Business Transformation & Emerging Issues Software & Tools					
WEALTH MANAGEMENT					
PD NEXUS DAYS					

ACCOUNTING & ASSURANCE	<b>MANAGEMENT ACCOUNTING</b>			
Audit & Assurance Financial Reporting	<b>Accelerate and Optimize Financial Close and Spreadsheet Controls</b>	Two segments Nov-29 & Nov-30	9am-12:30pm	Live Webinar
<b>Management Accounting</b>	Gain a practical understanding of best practices in the financial close processes and learn how to accelerate the financial close process and controls. You will focus on spreadsheet controls, which make the whole process of using spreadsheets more effective and efficient. You will also learn how to redesign and enhance spreadsheets to reduce the likelihood of error and facilitate the use of spreadsheets as analytical tools.			
ETHICS				
<b>FINANCE &amp; ECONOMICS</b>				
Business Valuations Corporate Finance Financial Modelling				
<b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b>				
Communication & Negotiation Self Management & Wellness Teamwork & Leadership Resilient Leadership Certificate Program	<b>Advanced Financial Statement Analysis</b>	Nov-19	9am-5pm	Live Webinar
<b>PRACTICE MANAGEMENT</b>	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.			
<b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b>				
Risk Management & Fraud Strategy, Governance, & Human Resource Strategic & Advanced Strategic Management Certificate Programs	<b>An Introduction to Strategy-Driven Budgeting</b>	Two segments Nov-04 & Nov-05	9am-12:30pm	Live Webinar
<b>TAXATION</b>	Review traditional budgeting approaches, such as adjusted cost, to understand the strengths and weaknesses of these approaches. Then explore strategy-based budgeting (SBB), a well-established methodology that takes into account demand-driven budgeting to allow for better forecasting of costs of operations.			
Commodity Tax Corporate & Personal Tax Not-For-Profit Organizations Trusts & Estates US & International Taxation	<b>Budgeting &amp; Financial Management: Understanding Budgeting Variance Analysis &amp; Forecasting</b>	Oct-26	9am-5pm	<b>In-Person, Vancouver</b>
<b>TECHNOLOGY &amp; INNOVATION</b>	Learn the principles of financial management and how to apply them when making decisions that may affect financial performance. Understand the context within which a budget must be managed in order to meet corporate reporting requirements, and the responsibilities of managing a budget.	Two segments Nov-08 & Nov-12	8:30am-11am	Live Webinar
Business Transformation & Emerging Issues Software & Tools				
<b>WEALTH MANAGEMENT</b>				
<b>PD NEXUS DAYS</b>				

# SEMINAR SCHEDULE CATEGORY & TITLE

Category	Topic	Date	Time	Format
ACCOUNTING & ASSURANCE Audit & Assurance Financial Reporting Management Accounting	<b>Controllership - Operational Management</b> In order to add value to their organizations, controllers serve distinct roles and this seminar focuses on two: steward and operator. In the operator role, the controller plays a part in human resource management as well as performs their steward role through financial performance and performance measurement, information/risk management, and relationship management skills. Participants will gain insights, skills, practical tips, and a broader view of the controller's role to add value to their organization.	Dec-08 Mar-08	9am-5pm 9am-5pm	In-Person, Vancouver Live Webinar
				Online On-demand available
ETHICS				
FINANCE & ECONOMICS Business Valuations Corporate Finance Financial Modelling				
PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT Communication & Negotiation Self Management & Wellness Teamwork & Leadership Resilient Leadership Certificate Program	<b>Controllership - Strategic Leadership</b> This seminar clarifies the controllers' responsibilities and provides an in-depth examination of the catalyst and strategist roles. It also provides strategies for working with people of all ages and explores the importance of emotional intelligence. Participants will be able to identify ways to add value as strategic leaders in their organization and will receive practical tips on how to enhance their leadership skills.	Dec-10 Mar-15	9am-5pm 9am-5pm	In-Person, Vancouver Live Webinar
				Online On-demand available
PRACTICE MANAGEMENT				
STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE Risk Management & Fraud Strategy, Governance, & Human Resource Strategic & Advanced Strategic Management Certificate Programs	<b>Costing and Profitability</b> 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.	Feb-25	9am-5pm	Live Webinar
TAXATION Commodity Tax Corporate & Personal Tax Not-For-Profit Organizations Trusts & Estates US & International Taxation	<b>Essential Topics for Controllers</b> Explore essential areas that you will be expected to be proficient at, or at least have knowledge of, as your career as a controller progresses. Career-enhancing topics such strategic planning, human resources, negotiating, management vs. leadership, and communication will be de-mystified.	Two segments Dec-06 & Dec-07	9am-12:30pm	Live Webinar
TECHNOLOGY & INNOVATION Business Transformation & Emerging Issues Software & Tools				
WEALTH MANAGEMENT				
PD NEXUS DAYS				

# SEMINAR SCHEDULE CATEGORY & TITLE

<b>ACCOUNTING &amp; ASSURANCE</b>	<b>Financial Management in the Construction Industry</b> Attain greater knowledge in business systems and financial awareness in the construction industry, from the necessary complexity of the project accounting system, to the broad and integrated spectrum of stakeholders. Explore and be able to confidently address a wide range of topics in these areas.	Two segments	9am-12:30pm	Live Webinar
Audit & Assurance Financial Reporting		Nov-04 & Nov-05		
<b>Management Accounting</b>				
<b>ETHICS</b>				
<b>FINANCE &amp; ECONOMICS</b>	<b>NEW Implementation of Internal Controls in the Small to Mid-size Enterprise Context</b> Leadership and expectations of the finance function are evolving rapidly, resulting in diverse definitions of good governance, management responsibility, and appropriate internal control. This hands-on seminar gives new and experienced financial leaders an opportunity to explore and discuss implementation of internal controls in the SME context, using the COSO Enterprise Risk Management Methodology.	Nov-12	9am-12:30pm	Live Webinar
Business Valuations Corporate Finance Financial Modelling		<i>Online</i>		
<b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b>				
Communication & Negotiation Self Management & Wellness Teamwork & Leadership Resilient Leadership Certificate Program	<i>On-demand available</i>			
<b>PRACTICE MANAGEMENT</b>	<b>Internal Controls - Industry Sector</b> This seminar provides an overview of the main concepts of internal controls and the associated components, focusing on the COSO framework. Common internal control deficiencies related to financial reporting in a small-to-medium sized company are presented and potential solutions examined using discussion and exercises. Participants will explore key controls in the financial statement reporting process to address risk, the effect of technology on internal controls, and how to monitors the internal controls.	Two segments	9am-12:30pm	Live Webinar
<b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b>		Oct-27 & Oct-28		
Risk Management & Fraud Strategy, Governance, & Human Resource Strategic & Advanced Strategic Management Certificate Programs	<i>Online</i> <i>On-demand available</i>			
<b>TAXATION</b>				
Commodity Tax Corporate & Personal Tax Not-For-Profit Organizations Trusts & Estates US & International Taxation	<b>Interpreting Financial Statements</b> Strengthen your financial statement analysis capabilities through a hands-on review and interpretation of case studies as well as discussions. Be able to quickly and confidently identify what is happening through the interpretation of financial results, a critical skill in your toolbox.	Two segments	9am-12:30pm	Live Webinar
<b>TECHNOLOGY &amp; INNOVATION</b>		Dec-13 & Dec-14		
Business Transformation & Emerging Issues Software & Tools				
<b>WEALTH MANAGEMENT</b>				
<b>PD NEXUS DAYS</b>				

# SEMINAR SCHEDULE CATEGORY & TITLE

Category	Title	Date	Time	Format
ACCOUNTING & ASSURANCE Audit & Assurance Financial Reporting	<b>Managing Through Cash Difficulties</b>	Sep-28	9am-11am	Live Webinar
	This course provides practical advice for accountants and others who are facing cash difficulties or advising on them, because of COVID-19 or other reasons. Using examples and stories obtained from real-life experience, this course will help all types of businesses, including not-for-profit organizations and charities, navigate uncertain times. The session is presented by a veteran CFO known for his practicality, compelling examples, and humour.			
Management Accounting				
ETHICS				
FINANCE & ECONOMICS Business Valuations Corporate Finance Financial Modelling				
PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT Communication & Negotiation Self Management & Wellness Teamwork & Leadership Resilient Leadership Certificate Program	<b>Powerful Financial Analysis</b>	Oct-29	9am-5pm	Live Webinar
	Acquire key skills that financial analysts need to perform their role effectively within an accounting department. Obtain tools that will assist analysts in furthering their careers, including the abilities to providing meaningful information and influence those around them.			
PRACTICE MANAGEMENT	<b>Practical Tips for Controllers &amp; CFOs</b>	Nov-29 Dec-13 Mar-28	9am-5pm 9am-5pm 9am-5pm	Live Webinar Live Webinar Live Webinar
	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.			
STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE Risk Management & Fraud Strategy, Governance, & Human Resource Strategic & Advanced Strategic Management Certificate Programs	<b>Practical Tips for Not-for-Profit Financial Leaders</b>	Nov-30	9am-5pm	Live Webinar
	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.			
TAXATION Commodity Tax Corporate & Personal Tax Not-For-Profit Organizations Trusts & Estates US & International Taxation	<b>Taking Financial Statement &amp; Ratio Analysis to the Next Level</b>	Feb-24	9am-5pm	Live Webinar
	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.			
TECHNOLOGY & INNOVATION Business Transformation & Emerging Issues Software & Tools				
WEALTH MANAGEMENT				
PD NEXUS DAYS				

ACCOUNTING & ASSURANCE	<b>ETHICS</b>			
Audit & Assurance Financial Reporting Management Accounting	<b>A Threats and Safeguards Approach to Ethical Decision Making</b>	Sep-22	8:30am-12:30pm	<b>In-Person, Vancouver</b>
<b>ETHICS</b>	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.	Sep-28	8:30am-12:30pm	Live Webinar
<b>FINANCE &amp; ECONOMICS</b>		Oct-07	8:30am-12:30pm	Live Webinar
Business Valuations Corporate Finance Financial Modelling		Oct-23	8:30am-12:30pm	Live Webinar
<b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b>		Nov-01	8:30am-12:30pm	Live Webinar
Communication & Negotiation Self Management & Wellness Teamwork & Leadership Resilient Leadership Certificate Program		Nov-06	8:30am-12:30pm	Live Webinar
<b>PRACTICE MANAGEMENT</b>		Nov-20	8:30am-12:30pm	Live Webinar
<b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b>		Nov-27	8:30am-12:30pm	Live Webinar
Risk Management & Fraud Strategy, Governance, & Human Resource Strategic & Advanced Strategic Management Certificate Programs		Dec-03	8:30am-12:30pm	Live Webinar
<b>TAXATION</b>		Dec-07	8:30am-12:30pm	Live Webinar
Commodity Tax Corporate & Personal Tax Not-For-Profit Organizations Trusts & Estates US & International Taxation		Dec-09	8:30am-12:30pm	<b>In-Person, Vancouver</b>
<b>TECHNOLOGY &amp; INNOVATION</b>		Dec-11	8:30am-12:30pm	Live Webinar
Business Transformation & Emerging Issues Software & Tools		Dec-13	8:30am-12:30pm	Live Webinar
<b>WEALTH MANAGEMENT</b>		Feb-02	8:30am-12:30pm	Live Webinar
<b>PD NEXUS DAYS</b>		Mar-22	8:30am-12:30pm	Live Webinar
	<b>Becoming an Ethical Leader</b>	Nov-18	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.	Dec-13	8:30am-12:30pm	Live Webinar
		Feb-11	8:30am-12:30pm	Live Webinar
		Mar-11	8:30am-12:30pm	Live Webinar
	<b>Business Ethics: It Starts With You</b>	Oct-20	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.	Oct-21	8:30am-12:30pm	Live Webinar
		Nov-09	8:30am-12:30pm	Live Webinar
		Nov-22	1pm-5pm	Live Webinar
		Nov-17	8:30am-12:30pm	Live Webinar
		Dec-17	8:30am-12:30pm	Live Webinar
		Feb-15	8:30am-12:30pm	Live Webinar
		Feb-23	8:30am-12:30pm	Live Webinar
		Mar-08	8:30am-12:30pm	Live Webinar

# SEMINAR SCHEDULE CATEGORY & TITLE

<b>ACCOUNTING &amp; ASSURANCE</b> Audit & Assurance Financial Reporting Management Accounting	<b>Ethical Decision Making: Exploring the Hidden Influence of Unconscious Bias in the Conscious Mind</b> 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.	Oct-26	8:30am-12:30pm	Live Webinar
		Nov-26	8:30am-12:30pm	Live Webinar
		Dec-14	8:30am-12:30pm	Live Webinar
		Feb-11	8:30am-12:30pm	Live Webinar
<b>ETHICS</b>				
<b>FINANCE &amp; ECONOMICS</b> Business Valuations Corporate Finance Financial Modelling	<b>Ethical Leadership in an Age of AI</b> Advancements in artificial intelligence (AI) raise unique ethical challenges for business leaders. Participants will collaborate to evaluate a variety of ethical situations and explore the implications of AI technologies on the role of an ethical leader in the context of the CPA Code.	Sep-23	8:30am-12:30pm	Live Webinar
		Nov-04	8:30am-12:30pm	<b>In-Person, Vancouver</b>
		Dec-06	8:30am-12:30pm	Live Webinar
<b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b> Communication & Negotiation Self Management & Wellness Teamwork & Leadership Resilient Leadership Certificate Program		Jan-27	8:30am-12:30pm	Live Webinar
<b>PRACTICE MANAGEMENT</b>				
<b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b> Risk Management & Fraud Strategy, Governance, & Human Resource Strategic & Advanced Strategic Management Certificate Programs	<b>Ethics and Technology</b> Uncover ethical considerations and outcomes related to technology. Explore “technoethics”, and the implications this has on individuals and organizations, in issues such as copyrights, cybercrimes, and geo-tracking technologies.	Nov-10	8:30am-12:30pm	Live Webinar
		Nov-29	8:30am-12:30pm	Live Webinar
		Mar-07	8:30am-12:30pm	Live Webinar
<b>TAXATION</b> Commodity Tax Corporate & Personal Tax Not-For-Profit Organizations Trusts & Estates US & International Taxation	<b>Ethics at Our Core</b> Refresh your knowledge on 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.	Oct-15	8:30am-12:30pm	Live Webinar
		Dec-08	8:30am-12:30pm	Live Webinar
		Dec-18	8:30am-12:30pm	Live Webinar
				<i>Online</i> <i>On-demand available</i>
<b>TECHNOLOGY &amp; INNOVATION</b> Business Transformation & Emerging Issues Software & Tools				
<b>WEALTH MANAGEMENT</b>				
<b>PD NEXUS DAYS</b>				

» **INSTRUCTOR** This course is led by [Laura Friedrich](#), read her article online at [bccpa.ca](#).

## SEMINAR SCHEDULE CATEGORY & TITLE

<b>ACCOUNTING &amp; ASSURANCE</b> Audit & Assurance Financial Reporting Management Accounting	<b>NEW Professional Ethics for Career and Life Success</b> 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.	Oct-28	8:30am-12:30pm	Live Webinar
		Dec-17	8:30am-12:30pm	Live Webinar
<b>ETHICS</b>				
<b>FINANCE &amp; ECONOMICS</b> Business Valuations Corporate Finance Financial Modelling	<b>Shades of Grey: Ethics in the Workplace</b> Enhance your understanding of professional ethics through group case studies on everyday dilemmas and explore moral philosophy in the workplace.	Nov-18	1pm-5pm	Live Webinar
		Dec-13	1pm-5pm	Live Webinar
<b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b> Communication & Negotiation Self Management & Wellness Teamwork & Leadership Resilient Leadership Certificate Program		Feb-11	1pm-5pm	Live Webinar
		Mar-11	1pm-5pm	Live Webinar
<b>PRACTICE MANAGEMENT</b>	<b>Understanding and Embracing Ethics in the Workplace</b> Learn effective techniques for ethical thinking and how to apply these tools to relevant business-based scenarios.	Oct-25	8:30am-12:30pm	Live Webinar
		Nov-15	8:30am-12:30pm	Live Webinar
<b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b> Risk Management & Fraud Strategy, Governance, & Human Resource Strategic & Advanced Strategic Management Certificate Programs		Dec-10	8:30am-12:30pm	Live Webinar
		Mar-16	8:30am-12:30pm	Live Webinar
<b>TAXATION</b> Commodity Tax Corporate & Personal Tax Not-For-Profit Organizations Trusts & Estates US & International Taxation				
<b>TECHNOLOGY &amp; INNOVATION</b> Business Transformation & Emerging Issues Software & Tools				
<b>WEALTH MANAGEMENT</b>				
<b>PD NEXUS DAYS</b>				

ACCOUNTING & ASSURANCE	<b>FINANCE &amp; ECONOMICS</b>			
Audit & Assurance Financial Reporting Management Accounting	<b>BUSINESS VALUATIONS</b>			
ETHICS	<b>Business Valuations - Advanced</b>	Jan-18	9am-5pm	Live Webinar
	Building on the concepts taught in Business Valuations - Fundamentals, this seminar gives participants more detailed insight into some complex issues associated with business valuations using a detailed case study. This seminar dissects the basic approaches so that practitioners can recognize the limitations of various valuation approaches, and provides information that will allow professionals to conduct supplementary analysis for a more robust conclusion of value.	<i>Online</i> <i>On-demand available</i>		
<b>FINANCE &amp; ECONOMICS</b>				
<b>Business Valuations</b>				
Corporate Finance Financial Modelling				
PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT	<b>Business Valuations - Fundamentals</b>	Nov-05 Dec-02 Mar-15	9am-5pm 9am-5pm 9am-5pm	Live Webinar Live Webinar <b>In-Person, Vancouver</b>
Communication & Negotiation Self Management & Wellness Teamwork & Leadership Resilient Leadership Certificate Program	Accountants often need basic business valuation knowledge and skills to assist their clients or employers. This seminar provides participants with practical insight into business valuation. Participants will gain insight on how to apply various valuation tools and the valuation process under an asset approach, income approach, and market approach.	<i>Online</i> <i>On-demand available</i>		
PRACTICE MANAGEMENT	<b>Business Valuations - Purchase Price Allocation</b>	Jan-28	9am-5pm	Live Webinar
STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE	This seminar presents practical strategies for approaching a purchase price allocation (PPA) for financial reporting purposes following a business acquisition or combination. The seminar provides a summary of valuation techniques used for specific, identifiable intangible assets and provides a step-by-step review of sample calculations for valuing different types of intangible assets resulting from a business purchase.	<i>Online</i> <i>On-demand available</i>		
Risk Management & Fraud Strategy, Governance, & Human Resource Strategic & Advanced Strategic Management Certificate Programs				
TAXATION				
Commodity Tax Corporate & Personal Tax Not-For-Profit Organizations Trusts & Estates US & International Taxation				
TECHNOLOGY & INNOVATION				
Business Transformation & Emerging Issues Software & Tools				
WEALTH MANAGEMENT				
PD NEXUS DAYS				

<p><b>ACCOUNTING &amp; ASSURANCE</b> Audit &amp; Assurance Financial Reporting Management Accounting</p> <p><b>ETHICS</b></p> <p><b>FINANCE &amp; ECONOMICS</b> Business Valuations <b>Corporate Finance</b> Financial Modelling</p> <p><b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b> Communication &amp; Negotiation Self Management &amp; Wellness Teamwork &amp; Leadership Resilient Leadership Certificate Program</p> <p><b>PRACTICE MANAGEMENT</b></p> <p><b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b> Risk Management &amp; Fraud Strategy, Governance, &amp; Human Resource Strategic &amp; Advanced Strategic Management Certificate Programs</p> <p><b>TAXATION</b> Commodity Tax Corporate &amp; Personal Tax Not-For-Profit Organizations Trusts &amp; Estates US &amp; International Taxation</p> <p><b>TECHNOLOGY &amp; INNOVATION</b> Business Transformation &amp; Emerging Issues Software &amp; Tools</p> <p><b>WEALTH MANAGEMENT</b></p> <p><b>PD NEXUS DAYS</b></p>	<b>CORPORATE FINANCE</b>			
	<p><b>Corporate Finance</b> This workshop will focus on providing participants with a working knowledge of the various ways business activity, and mergers and acquisitions in particular, can be assessed and financed through the capital markets. Participants will learn what form of funding a company will typically seek at each stage of its business life-cycle and understand the relative benefits of debt funding over equity funding.</p>	<p>Two segments Nov-17 &amp; Nov 19</p>	<p>1pm-4:30pm</p>	<p>Live Webinar</p>
	<p><b>Corporate Treasury Management</b> Treasury is a key finance function that ensures businesses have the money they need to manage their day-to-day business obligations, while also helping develop their long-term financial strategies and policies. In this seminar for treasury professionals and financial managers, participants will work through detailed calculations, case studies, and examples to gain an understanding of the treasury function and how to apply its fundamental principles within the finance department of their organizations.</p>	<p>Nov-17</p> <p><i>Online On-demand available</i></p>	<p>9am-5pm</p>	<p>Live Webinar</p>
	<p><b>Due Diligence for Acquisitions</b> 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&amp;A transactions.</p>	<p>Nov-18</p> <p><i>Online On-demand available</i></p>	<p>9am-5pm</p>	<p>Live Webinar</p>
	<p><b>Financing Strategies</b> Many businesses require some type of financing and this seminar provides an in-depth review of the various forms of financing to fund capital projects or acquisitions and to reorganize existing capital structures. Participants will gain a deeper understanding of what capital providers are seeking, issues that can arise, and how companies should prepare themselves to execute a financing transaction to seek financing and negotiate with capital providers.</p>	<p>Dec-03</p> <p><i>Online On-demand available</i></p>	<p>9am-5pm</p>	<p>Live Webinar</p>

## SEMINAR SCHEDULE CATEGORY & TITLE

<p><b>ACCOUNTING &amp; ASSURANCE</b> Audit &amp; Assurance Financial Reporting Management Accounting</p> <p><b>ETHICS</b></p>	<p><b>Treasury &amp; Finance for Accountants</b> 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>	Nov-12	9am-5pm	Live Webinar
<p><b>FINANCE &amp; ECONOMICS</b> Business Valuations <b>Corporate Finance</b> <b>Financial Modelling</b></p>	<p><b>FINANCIAL MODELLING</b></p>			
<p><b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b> Communication &amp; Negotiation Self Management &amp; Wellness Teamwork &amp; Leadership Resilient Leadership Certificate Program</p>	<p><b>Building a Model (of a Company)</b> 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>	Oct-26	9am-5pm	Live Webinar
<p><b>PRACTICE MANAGEMENT</b></p> <p><b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b> Risk Management &amp; Fraud Strategy, Governance, &amp; Human Resource Strategic &amp; Advanced Strategic Management Certificate Programs</p>	<p><b>Financial Modeling in Excel</b> 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>	Two segments Feb-15 & Feb-16	1pm-4:30pm	Live Webinar
<p><b>TAXATION</b> Commodity Tax Corporate &amp; Personal Tax Not-For-Profit Organizations Trusts &amp; Estates US &amp; International Taxation</p>	<p><b>Modeling Project Finance: Real Estate</b> Project finance is a growing market with a great deal of activity in both the public and private sectors from real estate to infrastructure (roads, hospitals, alternative energy). This hands-on workshop gets participants to model a real estate project's cash flows from land purchase through development to sale. It also covers modeling various forms of debt and equity.</p>	Two segments Dec-06 & Dec-07	1pm-4:30pm	Live Webinar
<p><b>TECHNOLOGY &amp; INNOVATION</b> Business Transformation &amp; Emerging Issues Software &amp; Tools</p>	<p><b>WEALTH MANAGEMENT</b></p>			
<p><b>PD NEXUS DAYS</b></p>				

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

**ETHICS**

**FINANCE & ECONOMICS**  
 Business Valuations  
 Corporate Finance  
 Financial Modelling

**PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT**  
**Communication & Negotiation**  
 Self Management & Wellness  
 Teamwork & Leadership  
 Resilient Leadership  
 Certificate Program

**PRACTICE MANAGEMENT**

**STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE**  
 Risk Management & Fraud  
 Strategy, Governance, & Human Resource  
 Strategic & Advanced  
 Strategic Management  
 Certificate Programs

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

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

**WEALTH MANAGEMENT**

**PD NEXUS DAYS**

## PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT

### COMMUNICATION & NEGOTIATION

<p><b>Becoming a Skilled Negotiator</b>                  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                  Nov-30 &amp; Dec-01</p>	<p>8:30am-12pm</p>	<p>Live Webinar</p>
<p><b>Communicating Effectively Under Pressure</b>                  Explore situations where you may feel pressure, and learn practical strategies to manage these situations effectively.</p>	<p>Dec-06                   Two segments                  Mar-17 &amp; Mar-18</p>	<p>9am-5pm                   9am-12:30pm</p>	<p><b>In-Person, Vancouver</b>                   Live Webinar</p>
<p><b>Communicating With Influence</b>                  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>Two segments                  Nov-09 &amp; Nov-10</p>	<p>9am-12:30pm</p>	<p>Live Webinar</p>
<p><b>Conflict: Changing Viewpoints &amp; Influencing Behaviors</b>                  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                  Oct-27, Oct-28 &amp; Oct-29</p>	<p>10am-12:30pm</p>	<p>Live Webinar</p>
<p><b>Presentation and Public Speaking Skills Workshop for Accountants</b>                  Presentation skills are a great asset in developing a business career. This full-day workshop is designed to give accounting professionals increased confidence and skills in building and delivering presentations.</p>	<p>Nov-19</p>	<p>9am-5pm</p>	<p><b>In-Person, Vancouver</b></p>

# SEMINAR SCHEDULE CATEGORY & TITLE

<b>ACCOUNTING &amp; ASSURANCE</b> Audit & Assurance Financial Reporting Management Accounting	<b>Level Up: Better Online Meetings</b> Like it or not, virtual meetings are here to stay. Learn how to make the most of online meetings so you can better connect with participants in an engaging, efficient way.	Nov-17	8:30am-12pm	Live Webinar
	<b>ETHICS</b>	<b>Level Up: Public Speaking and Presentation Skills</b> Whether you dread speaking in front of others or simply know you can do better, this course will provide you with tangible tips and tools you can use to take your public speaking to the next level. From preparation to execution, we will explore ways you can enhance all aspects of your public speaking and presentation skills.	Oct-27	8:30am-12pm
<b>FINANCE &amp; ECONOMICS</b> Business Valuations Corporate Finance Financial Modelling	<b>Level Up: Writing for Clarity and Impact</b> From Slack messages to client emails and reports, written communication is everywhere. Is your message landing? In this workshop, you'll learn how to improve your writing by focusing on clarity and impact.	Oct-26 Feb-15	8:30am-12pm 8:30am-12pm	Live Webinar Live Webinar
	<b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b> <b>Communication &amp; Negotiation</b> Self Management & Wellness Teamwork & Leadership Resilient Leadership Certificate Program	<b>Negotiation Skills</b> 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.	Nov-23  Two segments Feb-16 & Feb-17	9am-5pm  9am-12:30pm
<b>PRACTICE MANAGEMENT</b>	<b>Tools for Communicating with Difficult People</b> Learn how to deal with your reactions to others and self-manage your own. Discover techniques to respectfully but assertively conduct difficult conversations.	Two segments Nov-23 & Nov-24  Feb-17	9am-12:30pm  9am-5pm	Live Webinar  <b>In-Person, Vancouver</b>
	<b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b> Risk Management & Fraud Strategy, Governance, & Human Resource Strategic & Advanced Strategic Management Certificate Programs	<b>» INSTRUCTOR</b> This course is led by Pam Penner, read her article online at <a href="http://bccpa.ca">bccpa.ca</a> .		
<b>TAXATION</b> Commodity Tax Corporate & Personal Tax Not-For-Profit Organizations Trusts & Estates US & International Taxation				
<b>TECHNOLOGY &amp; INNOVATION</b> Business Transformation & Emerging Issues Software & Tools				
<b>WEALTH MANAGEMENT</b>				
<b>PD NEXUS DAYS</b>				

## SEMINAR SCHEDULE CATEGORY & TITLE

<b>ACCOUNTING &amp; ASSURANCE</b> Audit & Assurance Financial Reporting Management Accounting	<b>Write to be Read</b> 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.	Dec-09	9am-12:30pm	Live Webinar
<b>ETHICS</b>				
<b>FINANCE &amp; ECONOMICS</b> Business Valuations Corporate Finance Financial Modelling				
<b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b> <b>Communication &amp; Negotiation</b> <b>Self Management &amp; Wellness</b>	<b>SELF MANAGEMENT &amp; WELLNESS</b>  <b>Becoming...What You Really Want To Be</b> 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 this unique, inspiring learning experience.	Three segments Dec-07, Dec-08 & Dec-09	10am-12:30pm	Live Webinar
Teamwork & Leadership Resilient Leadership Certificate Program				
<b>PRACTICE MANAGEMENT</b>	<b>Brain Focus: The Power of Full Engagement</b> A full-day course packed with strategies to help your productivity and improve your focus to work smarter all day long.	Mar-02	9am-12:30pm	Live Webinar
<b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b> Risk Management & Fraud Strategy, Governance, & Human Resource Strategic & Advanced Strategic Management Certificate Programs				
<b>TAXATION</b> Commodity Tax Corporate & Personal Tax Not-For-Profit Organizations Trusts & Estates US & International Taxation	<b>Coach Yourself First</b> 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.	Oct-28 Nov-16 Feb-17	9am-5pm 9am-5pm 9am-5pm	Live Webinar Live Webinar Live Webinar
<b>TECHNOLOGY &amp; INNOVATION</b> Business Transformation & Emerging Issues Software & Tools				
<b>WEALTH MANAGEMENT</b>	<b>Critical Thinking and Self Reflection</b> 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.	Nov-10 Dec-16	9am-5pm 9am-5pm	Live Webinar Live Webinar
<b>PD NEXUS DAYS</b>				

# SEMINAR SCHEDULE CATEGORY & TITLE

<p><b>ACCOUNTING &amp; ASSURANCE</b> Audit &amp; Assurance Financial Reporting Management Accounting</p>	<p><b>Emotional Intelligence (EQ) - The Myths and The Mastery</b> The research is crystal clear - regardless of the type of work, EQ is the cornerstone of superior performance. When star performers were analyzed, the 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>	Mar-16	9am-12:30pm	Live Webinar
<p><b>ETHICS</b></p> <p><b>FINANCE &amp; ECONOMICS</b> Business Valuations Corporate Finance Financial Modelling</p>	<p><b>Influence and Assertiveness</b> 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>	Feb-22	9am-5pm	Live Webinar
<p><b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b> Communication &amp; Negotiation</p> <p><b>Self Management &amp; Wellness</b> Teamwork &amp; Leadership Resilient Leadership Certificate Program</p>	<p><b>Leading Self and Emotional Intelligence</b> Learn how to apply factual thinking to better deal with your emotional triggers and self-limiting beliefs. Discover practical tools that will enable you to build new habits and to relate to others in a more impactful and influential way.</p>	Nov-18	9am-12:30pm	Live Webinar
<p><b>PRACTICE MANAGEMENT</b></p> <p><b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b> Risk Management &amp; Fraud Strategy, Governance, &amp; Human Resource Strategic &amp; Advanced Strategic Management Certificate Programs</p>	<p><b>Personal Effectiveness: Self Awareness and Balanced Thinking</b> 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>	Dec-14	9am-5pm	Live Webinar
<p><b>TAXATION</b> Commodity Tax Corporate &amp; Personal Tax Not-For-Profit Organizations Trusts &amp; Estates US &amp; International Taxation</p>	<p><b>The Four Intelligences</b> 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>	Dec-03	9am-12:30pm	Live Webinar
<p><b>TECHNOLOGY &amp; INNOVATION</b> Business Transformation &amp; Emerging Issues Software &amp; Tools</p>				
<p><b>WEALTH MANAGEMENT</b></p>				
<p><b>PD NEXUS DAYS</b></p>				

## SEMINAR SCHEDULE CATEGORY & TITLE

<b>ACCOUNTING &amp; ASSURANCE</b> Audit & Assurance Financial Reporting Management Accounting	<b>Time Management: The Essentials of Productivity Skills</b> 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 a seminar that focuses on practicality.	Feb-22	9am-5pm	Live Webinar
	<b>ETHICS</b>	<b>Triple Your Reading Speed</b> 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.	Nov-17	9am-5pm
<b>FINANCE &amp; ECONOMICS</b> Business Valuations Corporate Finance Financial Modelling	» <b>READ MORE</b> Learn about reading comprehension in this article online at <a href="http://bccpa.ca">bccpa.ca</a> .			
<b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b> Communication & Negotiation	<b>We Have to Talk: Having the Difficult Conversation</b> In a recent Google search, dozens of books on the topic of crucial, fierce, important conversations were found. One common theme emerges from this literature – the fear of difficult conversations is often more stressful than the actual conversation. This workshop places difficult conversations at the core of successful work relationships.	Dec-15	9am-5pm	Live Webinar
<b>Self Management &amp; Wellness</b> <b>Teamwork &amp; Leadership</b> Resilient Leadership Certificate Program	<b>TEAMWORK &amp; LEADERSHIP</b>			
<b>PRACTICE MANAGEMENT</b>	<b>NEW Building and Managing Successful Business Relationships</b> Business is to a great extent about people. The quality of your working relationships has an enormous impact on your effectiveness, productivity, job satisfaction, and long-term employability. Relationship management is also a key driver of business efficiency, effectiveness, and long-term success. This workshop will help you build better business relationships, track your progress, and generate the results you want.	Feb-25	9am-12:30pm	Live Webinar
<b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b> Risk Management & Fraud Strategy, Governance, & Human Resource Strategic & Advanced Strategic Management Certificate Programs				
<b>TAXATION</b> Commodity Tax Corporate & Personal Tax Not-For-Profit Organizations Trusts & Estates US & International Taxation				
<b>TECHNOLOGY &amp; INNOVATION</b> Business Transformation & Emerging Issues Software & Tools				
<b>WEALTH MANAGEMENT</b>				
<b>PD NEXUS DAYS</b>				

# SEMINAR SCHEDULE CATEGORY & TITLE

<p><b>ACCOUNTING &amp; ASSURANCE</b>                  Audit &amp; Assurance                  Financial Reporting                  Management Accounting</p>	<p><b>Building High Performance Teams</b>                  Every business leader knows their workers are their best opportunity for achieving a sustainable competitive advantage. Learn how to genuinely motivate, engage, excite, and keep employees.</p>	<p>3 Segments                  Nov-23,                  Nov 24 &amp;                  Nov-25</p>	<p>10am-12:30pm</p>	<p>Live Webinar</p>
<p><b>ETHICS</b></p>				
<p><b>FINANCE &amp; ECONOMICS</b>                  Business Valuations                  Corporate Finance                  Financial Modelling</p>	<p><b>NEW Building Your Leadership Brand</b>                  Why would really talented people want to work really hard for you? Just as an organization cannot be all things to all customers, you must also discover and nurture your own unique value proposition as a leader. What are you best at? What do you stand for? And how does all of that show up in how you lead your team? This practical, hands-on workshop will help you build a leadership brand that is more valuable to your career and to everyone you work with. There are many ways to shine as a leader: What's going to work best for you?</p>	<p>Nov-19</p>	<p>9am-12:30pm</p>	<p>Live Webinar</p>
<p><b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b>                  Communication &amp; Negotiation                  Self Management &amp; Wellness</p>				
<p><b>Teamwork &amp; Leadership</b>                  Resilient Leadership                  Certificate Program</p>				
<p><b>PRACTICE MANAGEMENT</b></p>				
<p><b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b>                  Risk Management &amp; Fraud                  Strategy, Governance, &amp; Human Resource                  Strategic &amp; Advanced                  Strategic Management                  Certificate Programs</p>	<p><b>Coaching for Executive Excellence</b>                  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>	<p>Two Segments                  Nov-29 &amp;                  Dec-01</p>	<p>9am-12:30pm</p>	<p>Live Webinar</p>
<p><b>TAXATION</b>                  Commodity Tax                  Corporate &amp; Personal Tax                  Not-For-Profit Organizations                  Trusts &amp; Estates                  US &amp; International Taxation</p>	<p><b>Doing Business as Unusual</b>                  This cutting-edge, counter-intuitive course will enable you to start important conversations about how to fix failing or broken business practices by embracing ideas that run contrary to everything you've ever been taught to do to survive in a volatile, unpredictable world.</p>	<p>Three segments                  Nov-30,                  Dec-01 &amp;                  Dec-02</p>	<p>10am-12:30pm</p>	<p>Live Webinar</p>
<p><b>TECHNOLOGY &amp; INNOVATION</b>                  Business Transformation &amp; Emerging Issues                  Software &amp; Tools</p>				
<p><b>WEALTH MANAGEMENT</b></p>				
<p><b>PD NEXUS DAYS</b></p>				

# SEMINAR SCHEDULE CATEGORY & TITLE

<p><b>ACCOUNTING &amp; ASSURANCE</b>          Audit &amp; Assurance          Financial Reporting          Management Accounting</p>	<p><b>Employee Delegation, Engagement, and Empowerment</b>          Delegation, done well, drives employee engagement, development, performance, and retention. Delegation is also critical to management efficiency and effectiveness: no one can do it all on their own, and poor delegation causes misunderstandings and errors, which take a lot of time to clean up. This practical, hands-on workshop will take you through several important leadership practices to help you delegate more effectively and enhance employee engagement.</p>	<p>Nov-25</p>	<p>9am-12:30pm</p>	<p>Live Webinar</p>
<p><b>ETHICS</b></p> <p><b>FINANCE &amp; ECONOMICS</b>          Business Valuations          Corporate Finance          Financial Modelling</p>	<p><b>Empowering and Engaging Others</b>          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>Dec-02</p>	<p>9am-5pm</p>	<p>Live Webinar</p>
<p><b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b>          Communication &amp; Negotiation          Self Management &amp; Wellness</p>	<p><b>Leadership and Coaching</b>          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.</p>	<p>Oct-26          Nov-19          Mar-09</p>	<p>9am-5pm          9am-5pm          9am-5pm</p>	<p>Live Webinar          Live Webinar          Live Webinar</p>
<p><b>Teamwork &amp; Leadership</b>          Resilient Leadership          Certificate Program</p>	<p><b>Leading High Performance Team</b>          The ever-increasing pace and complexity of today's workplace is driving greater interdependence, making teams and teamwork more important to organizational success by the day. The objective of this course is for participants to learn both the principles and best practices of optimizing team performance.</p>	<p>Oct-27</p>	<p>9am-5pm</p>	<p><b>In-Person,          Vancouver</b></p>
<p><b>PRACTICE MANAGEMENT</b></p> <p><b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b>          Risk Management &amp; Fraud          Strategy, Governance, &amp; Human Resource          Strategic &amp; Advanced          Strategic Management          Certificate Programs</p>				
<p><b>TAXATION</b>          Commodity Tax          Corporate &amp; Personal Tax          Not-For-Profit Organizations          Trusts &amp; Estates          US &amp; International Taxation</p>				
<p><b>TECHNOLOGY &amp; INNOVATION</b>          Business Transformation &amp; Emerging Issues          Software &amp; Tools</p>				
<p><b>WEALTH MANAGEMENT</b></p>				
<p><b>PD NEXUS DAYS</b></p>				

# SEMINAR SCHEDULE CATEGORY & TITLE

<p><b>ACCOUNTING &amp; ASSURANCE</b> Audit &amp; Assurance Financial Reporting Management Accounting</p> <p><b>ETHICS</b></p> <p><b>FINANCE &amp; ECONOMICS</b> Business Valuations Corporate Finance Financial Modelling</p> <p><b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b> Communication &amp; Negotiation Self Management &amp; Wellness</p> <p><b>Teamwork &amp; Leadership</b> Resilient Leadership Certificate Program</p> <p><b>PRACTICE MANAGEMENT</b></p> <p><b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b> Risk Management &amp; Fraud Strategy, Governance, &amp; Human Resource Strategic &amp; Advanced Strategic Management Certificate Programs</p> <p><b>TAXATION</b> Commodity Tax Corporate &amp; Personal Tax Not-For-Profit Organizations Trusts &amp; Estates US &amp; International Taxation</p> <p><b>TECHNOLOGY &amp; INNOVATION</b> Business Transformation &amp; Emerging Issues Software &amp; Tools</p> <p><b>WEALTH MANAGEMENT</b></p> <p><b>PD NEXUS DAYS</b></p>	<p><b>NEW Leading Professional Teams - Successfully Transitioning from Professional Expert to Team Leader</b> Transitioning from a technical accounting expert to leading a team of accounting and other professionals is one of the most significant milestones in a person's career. It can however be a challenging transition. Leading teams means taking on new responsibilities and requires a broad portfolio of skills and an understanding of human psychology. Those skills come naturally to some, but for many, the transition is a learning journey. In this session, you will look at what it takes to lead teams effectively as well as the hurdles that trip up many aspiring team leaders.</p>	Nov-24	9am-12:30pm	Live Webinar
	<p><b>Managing Change and Transformation</b> 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.</p>	Dec-01	9am-5pm	Live Webinar
	<p><b>Managing My People</b> Managers find it challenging to maximize their people's contribution to the success of their business. This interactive course will discuss effective ways of working with teams, in order get the best out of each team member.</p>	Two segments Dec-08 & Dec-09	8:30am-12pm	Live Webinar
	<p><b>Project Management: Tips &amp; Traps</b> Learn how to apply foundational project management tools and practices in a way that increases the probability of successful project execution.</p>	Two segments Oct-28 & Oct-29	9am-12:30pm	Live Webinar
	<p><b>What Do People Want? Motivating Yourself and Others</b> 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>	Nov-29	9am-5pm	Live Webinar

## SEMINAR SCHEDULE CATEGORY & TITLE

<b>ACCOUNTING &amp; ASSURANCE</b> Audit & Assurance Financial Reporting Management Accounting	<b>Wiring Your Brain for High Impact Leadership</b> 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.	Nov-23 Dec-08	9am-5pm 9am-5pm	Live Webinar Live Webinar
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<b>ETHICS</b>	<hr/>			
<b>FINANCE &amp; ECONOMICS</b> Business Valuations Corporate Finance Financial Modelling	<hr/>			
<b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b> Communication & Negotiation Self Management & Wellness	<b>RESILIENT LEADERSHIP CERTIFICATE PROGRAM</b>	<hr/>		
<b>Teamwork &amp; Leadership</b> <b>Resilient Leadership Certificate Program</b>	<b>Resilient Leadership - Balance Life, Work, and Overwhelm</b> 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.	Nov-22 Mar-03	9am-12:30pm 9am-12:30pm	Live Webinar Live Webinar
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<b>PRACTICE MANAGEMENT</b>  <b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b> Risk Management & Fraud Strategy, Governance, & Human Resource Strategic & Advanced Strategic Management Certificate Programs	<b>Resilient Leadership - Energize Your Team Through Uncertainty</b> 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.	Nov-01 Feb-10	9am-12:30pm 9am-12:30pm	Live Webinar Live Webinar
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<b>TAXATION</b> Commodity Tax Corporate & Personal Tax Not-For-Profit Organizations Trusts & Estates US & International Taxation	<b>Resilient Leadership - Five Qualities of a Leader Who Thrives in a Crisis</b> 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.	Oct-25 Feb-03	9am-12:30pm 9am-12:30pm	Live Webinar Live Webinar
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<b>TECHNOLOGY &amp; INNOVATION</b> Business Transformation & Emerging Issues Software & Tools	<hr/>			
<b>WEALTH MANAGEMENT</b>	<hr/>			
<b>PD NEXUS DAYS</b>	<hr/>			

# SEMINAR SCHEDULE CATEGORY & TITLE

<b>ACCOUNTING &amp; ASSURANCE</b> Audit & Assurance Financial Reporting Management Accounting	<b>Resilient Leadership - Manage Your Mindset and Emotional Well-being</b>	Nov-15	9am-12:30pm	Live Webinar
	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.	Feb-24	9am-12:30pm	Live Webinar
<b>ETHICS</b>				
<b>FINANCE &amp; ECONOMICS</b> Business Valuations Corporate Finance Financial Modelling				
<b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b> Communication & Negotiation Self Management & Wellness Teamwork & Leadership	<b>Resilient Leadership - Who's Listening?</b>	Nov-08	9am-12:30pm	Live Webinar
<b>Resilient Leadership Certificate Program</b>	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.	Feb-17	9am-12:30pm	Live Webinar
<b>PRACTICE MANAGEMENT</b>				
<b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b> Risk Management & Fraud Strategy, Governance, & Human Resource Strategic & Advanced Strategic Management Certificate Programs				
<b>TAXATION</b> Commodity Tax Corporate & Personal Tax Not-For-Profit Organizations Trusts & Estates US & International Taxation				
<b>TECHNOLOGY &amp; INNOVATION</b> Business Transformation & Emerging Issues Software & Tools				
<b>WEALTH MANAGEMENT</b>				
<b>PD NEXUS DAYS</b>				

» **INSTRUCTOR** The Resilient Leadership Certificate Program is taught by [Tammy Robertson](#), listen to her on our [podcast](#), to learn how you can be a resilient leader.

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

## PRACTICE MANAGEMENT

<p><b>NEW Branding &amp; Marketing for Small Business</b></p> <p>Does your business look and sound as strong as the services you provide? In this course, we'll explore branding and marketing for small accounting firms with the goal of helping you elevate your business.</p>	Nov-16	9am-12:30pm	Live Webinar
<p><b>NEW Digital Marketing Essentials for Accountants</b></p> <p>From email to social media marketing, search engine advertising and more, digital marketing is an important part of any accounting business. In this course, we'll explore a number of tools to help you attract business and stand out online.</p>	Nov-03	9am-12:30pm	Live Webinar

» **PUBLIC PRACTITIONERS** Learn the latest ideas to help you not just survive but thrive after a challenging two years - attend [PD Nexus: Public Practice Insights \(Nov 29\)](#).

- ACCOUNTING & ASSURANCE
  - Audit & Assurance
  - Financial Reporting
  - Management Accounting
- ETHICS
- FINANCE & ECONOMICS
  - Business Valuations
  - Corporate Finance
  - Financial Modelling
- PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT
  - Communication & Negotiation
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- PRACTICE MANAGEMENT
- STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE**
  - Risk Management & Fraud**
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## STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE

### RISK MANAGEMENT & FRAUD

**Fraud Happens - What to Do When You Suspect Fraud** Two segments  
 Feb-17 & 9am-12:30pm Live Webinar  
 Feb-18  
*Online*  
*On-demand available*

A rational reaction plan is critical to responding appropriately to concerns about fraud and related inappropriate conduct. This seminar will provide best practices for conducting an organized financial investigation, and will guide participants through the many challenges that companies face, including using real-life examples of fraud.

**Fraud Risk Management** Two segments  
 Nov-18 & 9am-12:30pm Live Webinar  
 Nov-19  
*Online*  
*On-demand available*

Effective fraud risk management requires an integrated approach ensuring the full spectrum of unique risks are addressed. This holistic approach brings together key principles and practices using the current COSO fraud risk management framework. Case discussions, sample codes of conduct, fraud policies, fraud risk checklists, numerous examples, and other practical materials will assist participants to build a corporate culture and framework that prevents and detects fraudulent activity.

**Understanding the Financial Risk of Employee Benefits** Dec-09 1:30pm-5pm 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.

» **INSTRUCTOR** This course is led by Dan Eisner, read his article online at [bccpa.ca](http://bccpa.ca).

<p><b>ACCOUNTING &amp; ASSURANCE</b> Audit &amp; Assurance Financial Reporting Management Accounting</p> <p><b>ETHICS</b></p> <p><b>FINANCE &amp; ECONOMICS</b> Business Valuations Corporate Finance Financial Modelling</p> <p><b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b> Communication &amp; Negotiation Self Management &amp; Wellness Teamwork &amp; Leadership Resilient Leadership Certificate Program</p> <p><b>PRACTICE MANAGEMENT</b></p> <p><b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b> Risk Management &amp; Fraud</p> <p><b>Strategy, Governance, &amp; Human Resource</b> Strategic &amp; Advanced Strategic Management Certificate Programs</p> <p><b>TAXATION</b> Commodity Tax Corporate &amp; Personal Tax Not-For-Profit Organizations Trusts &amp; Estates US &amp; International Taxation</p> <p><b>TECHNOLOGY &amp; INNOVATION</b> Business Transformation &amp; Emerging Issues Software &amp; Tools</p> <p><b>WEALTH MANAGEMENT</b></p> <p><b>PD NEXUS DAYS</b></p>	<b>STRATEGY, GOVERNANCE &amp; HUMAN RESOURCE</b>			
	<p><b>NEW Emerging Areas of Focus and Practice for Boards</b></p> <p>This course will provide both a review of governance fundamentals and explore emerging areas of focus for boards in all sectors. This will be an interactive session, drawing on case studies to illustrate how boards are improving their approach in key areas including ESG and equity, diversity and inclusion. The practice points will have relevance for boards in various sectors.</p>	Dec-08	9am-12:30pm	Live Webinar
	<p><b>Employment Law &amp; HR Practices</b></p> <p>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.</p>	Nov-17 Dec-01	9am-5pm 9am-5pm	Live Webinar <b>In-Person, Vancouver</b>
	<p><b>NEW ERP Selection and Implementation</b></p> <p>As businesses change, the question “What systems do we need to manage our business activities?” is always raised. The term ERP strikes fear in many, as most people have heard horror stories about implementations gone wrong. This session will eliminate those fears and provide some answers on ERP systems for both small and large organizations, as well as the steps required to prepare your organization for selecting, implementing, and supporting an ERP system.</p>	Nov-29	8:30am-12:30pm	Live Webinar
	<p><b>Faster and Better Financial Process</b></p> <p>Learn how to implement a financial process review (FPR) to decrease cost and improve efficiency. Gain the skills and knowledge to understand FPR best practices and barriers for implementation, and how to troubleshoot problems when using FPR tools.</p>	Two segments Nov-08 & Nov-09	9am-12:30pm	Live Webinar

## SEMINAR SCHEDULE CATEGORY & TITLE

<b>ACCOUNTING &amp; ASSURANCE</b> Audit & Assurance Financial Reporting Management Accounting	<b>Handling Termination of Employment</b> Obtain an overview of issues and recent updates surrounding the termination of employment. Receive a comprehensive summary of employer termination liabilities, become aware of all the issues relating to termination of employment, and learn a practical framework for planning.	Dec-02	8am-10am	Live Webinar
<b>ETHICS</b>				
<b>FINANCE &amp; ECONOMICS</b> Business Valuations Corporate Finance Financial Modelling	<b>How to Achieve Your Company Vision Through Effective Performance Review</b> Many formal appraisal systems, if an organization even has one, provide little or no link to the corporate vision of the company. This course will show you how you can take your performance appraisal form in one hand, your company vision in the other, and tightly link the two together to achieve your corporate strategy.	Dec-08	9am-12:30pm	Live Webinar
<b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b> Communication & Negotiation Self Management & Wellness Teamwork & Leadership Resilient Leadership Certificate Program				
<b>PRACTICE MANAGEMENT</b>				
<b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b> Risk Management & Fraud	<b>NEW Mergers and Acquisitions - Aligning your Financial Systems, Processes &amp; People</b> Mergers and acquisitions have become a part of normal business for many companies and often these opportunities come when you least expect it. In this seminar we will walk through the steps required for aligning your financial systems, business practices, and people in a new organization.	Feb-23	8am-10am	Live Webinar
<b>Strategy, Governance, &amp; Human Resource</b> Strategic & Advanced Strategic Management Certificate Programs				
<b>TAXATION</b> Commodity Tax Corporate & Personal Tax Not-For-Profit Organizations Trusts & Estates US & International Taxation	<b>Workplace Law: All You Wanted to Know About and Were Afraid to Ask</b> 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.	Feb-02	9am-12:30pm	Live Webinar
<b>TECHNOLOGY &amp; INNOVATION</b> Business Transformation & Emerging Issues Software & Tools				
<b>WEALTH MANAGEMENT</b>				
<b>PD NEXUS DAYS</b>				

STRATEGIC & ADVANCED STRATEGIC MANAGEMENT CERTIFICATE PROGRAMS				
ACCOUNTING & ASSURANCE Audit & Assurance Financial Reporting Management Accounting	<b>Advanced Strategic Management Certificate: Links</b>	Oct-27	9am-5pm	<b>In-Person, Vancouver</b>
	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.	Feb-23	9am-5pm	<b>In-Person, Vancouver</b>
ETHICS				
FINANCE & ECONOMICS Business Valuations Corporate Finance Financial Modelling	<b>Advanced Strategic Management Certificate: Maps</b>	Oct-28	9am-5pm	<b>In-Person, Vancouver</b>
	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.	Feb-24	9am-5pm	<b>In-Person, Vancouver</b>
PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT Communication & Negotiation Self Management & Wellness Teamwork & Leadership Resilient Leadership Certificate Program				
	<b>Strategic Management Certificate: Change Management</b>	Oct-29	9am-5pm	<b>In-Person, Vancouver</b>
PRACTICE MANAGEMENT	Learn how organizational and human dynamics impact change initiatives, how to plan for change, and examine the main ingredients necessary for successful implementation.	Nov-03	9am-5pm	Live Webinar
		Dec-15	9am-5pm	Live webinar
STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE Risk Management & Fraud Strategy, Governance, & Human Resource	<b>Strategic Management Certificate: Risk Management &amp; Governance</b>	Nov-16	9am-5pm	Live Webinar
	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.	Dec-03	9am-5pm	<b>In-Person, Vancouver</b>
Strategic & Advanced Strategic Management Certificate Programs		Mar-09	9am-5pm	Live Webinar
	<b>Strategic Management Certificate: Strategic Planning</b>	Oct-20	9am-5pm	Live Webinar
TAXATION Commodity Tax Corporate & Personal Tax Not-For-Profit Organizations Trusts & Estates US & International Taxation	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.	Nov-05	9am-5pm	<b>In-Person, Vancouver</b>
		Dec-08	9am-5pm	Live Webinar
TECHNOLOGY & INNOVATION Business Transformation & Emerging Issues Software & Tools		Mar-16	9am-5pm	Live Webinar
	<b>Strategic Management Certificate: Team Development</b>	Nov-10	9am-5pm	Live Webinar
WEALTH MANAGEMENT	Gain an in-depth understanding of factors impacting team effectiveness, including team design, stages of team development, and ingredients necessary for achieving results.	Dec-16	9am-5pm	Live Webinar
		Feb-24	9am-5pm	<b>In-Person, Vancouver</b>
PD NEXUS DAYS				
» <b>INSTRUCTORS</b> The Strategic & Advanced Strategic Management Certificate Programs are led by <a href="#">Mia Maki</a> and <a href="#">Rieghardt Van Enter</a> .				

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

## TAXATION

### COMMODITY TAX

<p><b>GST/HST - CRA Audit</b></p> <p>Building upon GST/HST: The Fundamentals, this seminar provides an in-depth examination of the audit process. Participants will review a typical Canada Revenue Agency (CRA) audit from start to finish and learn about the most common audit exposures that create assessments for taxpayers. The seminar provides information to proactively prepare for a future audit, manage an audit, and cope with after-audit issues, including the assessment of penalties and the objection process.</p>	<p>Two segments Nov-29 &amp; Nov-30</p> <p>9am-12:30pm</p> <p>Live Webinar</p> <p><i>Online</i> <i>On-demand</i> <i>available</i></p>
<p><b>GST/HST - NFPOs</b></p> <p>This seminar focuses on the unique rules applicable to public service bodies, including the distinction between charities and other not-for-profit organizations. Participants will gain a greater awareness of the application of GST/HST and exempting provisions applicable to this unique sector, including common pitfalls and errors. A case study will be used to illustrate and reinforce the application of some of the complex rules applicable to a typical not-for-profit organization.</p>	<p>Dec-14</p> <p>9am-5pm</p> <p>Live Webinar</p> <p><i>Online</i> <i>On-demand</i> <i>available</i></p>
<p><b>GST/HST - Real Property</b></p> <p>This course explores the important GST/HST issues associated with real property transactions, including construction or substantial renovation of residential property, sale of real property including contract assignments, joint-ventures and partnerships, issues related to leasehold allowances and expense recoveries, and the special rules applicable to supplies of real property by charities and other public service bodies.</p>	<p>Nov-16</p> <p>9am-5pm</p> <p>Live Webinar</p> <p><i>Online</i> <i>On-demand</i> <i>available</i></p>

## SEMINAR SCHEDULE CATEGORY & TITLE

<b>ACCOUNTING &amp; ASSURANCE</b> Audit & Assurance Financial Reporting Management Accounting	<b>GST/HST - Specific Topics</b> Failure to be aware of the complexities of the GST and HST can result in lost recovery opportunities or worse, large tax assessments. This course presents advanced GST/HST topics to enhance the participant's knowledge about Canada's value-added-tax. Concepts related to the application and the recovery of GST/HST will be discussed in addition to an update on new and trending issues.	Nov-24	9am-5pm	Live Webinar
<b>ETHICS</b>		<i>Online</i> <i>On-demand</i> <i>available</i>		
<b>FINANCE &amp; ECONOMICS</b> Business Valuations Corporate Finance Financial Modelling	<b>GST/HST - The Fundamentals</b> The course provides an overview of Canada's federal sales tax starting with a review of the significance of the three different types of supplies as their misinterpretation can create significant exposures for suppliers located in both non-HST and HST provinces. Registration, collection requirements, who pays tax, input tax credit entitlements, some cross border issues, and common sources of errors and assessments are reviewed.	Oct-26 Dec-13	9am-5pm 9am-5pm	Live Webinar Live Webinar
<b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b> Communication & Negotiation Self Management & Wellness Teamwork & Leadership Resilient Leadership Certificate Program		<i>Online</i> <i>On-demand</i> <i>available</i>		
<b>PRACTICE MANAGEMENT</b>				
<b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b> Risk Management & Fraud Strategy, Governance, & Human Resource Strategic & Advanced Strategic Management Certificate Programs	<b>NEW GST/HST - Update 2021</b> This course will provide an overview of the legislative and case law updates between 2020 and mid-2021 relating to GST/HST, with an emphasis on the new simplified registration rules for non-residents and collection obligations for platform operators, new rules for fulfillment houses and accommodation platforms.	Nov-23 Dec-07	9am-12:30pm 9am-12:30pm	Live Webinar <b>In-Person,</b> <b>Vancouver</b>
<b>TAXATION</b>				
<b>Commodity Tax</b> Corporate & Personal Tax Not-For-Profit Organizations Trusts & Estates US & International Taxation	<b>PST - Review of Jurisdictional Sales Tax</b> This seminar is intended to provide exposure to the application of the four different provincial sales tax regimes, including policy intent and application of a "use" tax compared to the application of a "value-added tax" (VAT). Participants will be able to determine when to register and which tax applies, find opportunities to use exemptions, know how costs are impacted by PST, and be better prepared to respond to government audit queries.	Nov-18	9am-12:30pm	Live Webinar
<b>TECHNOLOGY &amp; INNOVATION</b> Business Transformation & Emerging Issues Software & Tools		<i>Online</i> <i>On-demand</i> <i>available</i>		
<b>WEALTH MANAGEMENT</b>				
<b>PD NEXUS DAYS</b>				

<b>ACCOUNTING &amp; ASSURANCE</b>
Audit & Assurance Financial Reporting Management Accounting
<b>ETHICS</b>
<b>FINANCE &amp; ECONOMICS</b>
Business Valuations Corporate Finance Financial Modelling
<b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b>
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<b>PD NEXUS DAYS</b>

**CORPORATE & PERSONAL TAX**

<p><b>Corporate Restructuring - Application for Private Corporations</b></p> <p>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.</p>	<p>Oct-28 Nov-23</p>	<p>1:30pm-5pm 9am-12:30pm</p>	<p><b>In-Person, Vancouver</b> Live Webinar</p>
	<p><i>Online On-demand available</i></p>		
<p><b>Corporate Restructuring - Fundamentals</b></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>Two segments Nov-01 &amp; Nov-02</p>	<p>9am-12:30pm</p>	<p>Live Webinar</p>
	<p>Nov-08</p>	<p>9am-5pm</p>	<p><b>In-Person, Vancouver</b></p>
<p><i>Online On-demand available</i></p>			
<p><b>Corporate Restructuring - Section 85: Transfer of Property</b></p> <p>This seminar covers selected tax aspects explaining the transfer of property to a corporation using the Section 85 rollover rules. Each module contains specific examples and cases designed to help participants review relevant tax theory and focus on major tax planning issues, including filing requirements and ensuring the transaction is not caught by key anti-avoidance provisions.</p>	<p>Nov-16 Nov-23</p>	<p>9am-5pm 9am-5pm</p>	<p>Live Webinar <b>In-Person, Vancouver</b></p>
	<p><i>Online On-demand available</i></p>		

# SEMINAR SCHEDULE CATEGORY & TITLE

Category	Title	Dates	Time	Format
ACCOUNTING & ASSURANCE Audit & Assurance Financial Reporting Management Accounting	<b>Corporate Tax - Compliance and Planning in T2 Preparation</b> This seminar addresses a comprehensive review of income tax compliance and planning issues relevant to the preparation of Canadian corporate income tax returns, including the technical and practical issues arising from these diverse issues as a means of enhancing the ability to prepare and/or review complete, accurate corporate income tax returns. This seminar identifies and addresses planning opportunities that can impact taxpayers filing corporate returns.	Nov-23	9am-5pm	Live Webinar
		Jan-25	9am-5pm	Live Webinar
ETHICS				
FINANCE & ECONOMICS Business Valuations Corporate Finance Financial Modelling	<b>Corporate Tax - Investment Holding Companies</b> 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?	Oct-26	9am-12:30pm	Live Webinar
		Nov-05	9am-12:30pm	<b>In-Person, Vancouver</b>
PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT Communication & Negotiation Self Management & Wellness Teamwork & Leadership Resilient Leadership Certificate Program		Dec-02	9am-12:30pm	Live Webinar
PRACTICE MANAGEMENT				
STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE Risk Management & Fraud Strategy, Governance, & Human Resource Strategic & Advanced Strategic Management Certificate Programs	<b>Corporate Tax - Purchase and Sale of a Business</b> This seminar will provide an understanding and update of Canadian income tax issues for purchasers and vendors of businesses in Canada and their professional tax advisors. The focus on this course will be on transactions between Canadian private business owners and/or their privately held corporations.	Oct-27	9am-5pm	Live Webinar
		Dec-02	9am-5pm	<b>In-Person, Vancouver</b>
TAXATION		Feb-16	9am-5pm	Live Webinar
Corporate & Personal Tax Not-For-Profit Organizations Trusts & Estates US & International Taxation	<b>Corporate Tax - RDTOH, CDA and Other Tax Accounts</b> 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.	Oct-28	9am-12:30pm	<b>In-Person, Vancouver</b>
		Nov-19	9am-12:30pm	Live Webinar
TECHNOLOGY & INNOVATION Business Transformation & Emerging Issues Software & Tools				
WEALTH MANAGEMENT				
PD NEXUS DAYS				

# SEMINAR SCHEDULE CATEGORY & TITLE

<p><b>ACCOUNTING &amp; ASSURANCE</b> Audit &amp; Assurance Financial Reporting Management Accounting</p> <p><b>ETHICS</b></p> <p><b>FINANCE &amp; ECONOMICS</b> Business Valuations Corporate Finance Financial Modelling</p> <p><b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b> Communication &amp; Negotiation Self Management &amp; Wellness Teamwork &amp; Leadership Resilient Leadership Certificate Program</p> <p><b>PRACTICE MANAGEMENT</b></p> <p><b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b> Risk Management &amp; Fraud Strategy, Governance, &amp; Human Resource Strategic &amp; Advanced Strategic Management Certificate Programs</p> <p><b>TAXATION</b></p> <p>Commodity Tax</p> <p><b>Corporate &amp; Personal Tax</b> Not-For-Profit Organizations Trusts &amp; Estates US &amp; International Taxation</p> <p><b>TECHNOLOGY &amp; INNOVATION</b> Business Transformation &amp; Emerging Issues Software &amp; Tools</p> <p><b>WEALTH MANAGEMENT</b></p> <p><b>PD NEXUS DAYS</b></p>	<p><b>Corporate Tax - Review of Tax Planning</b> 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 Oct-21 &amp; Oct-22 Feb-10 &amp; Feb-11</p>	<p>9am-5pm 9am-5pm</p>	<p>Live Webinar <b>In-Person, Vancouver</b></p>	
	<p><b>Corporate Tax - Shutting Down the Corporation</b> 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>	<p>Oct-22 Dec-06</p>	<p>9am-12:30pm 9am-12:30pm</p>	<p>Live Webinar <b>In-Person, Vancouver</b></p>	
	<p><b>Corporate Tax - Small Business Deduction and Private Corporate Groups</b> While the small business deduction reduces the amount of income tax for many corporations, the myriad of rules, regulations, and recent changes has significantly expanded the complexity. This seminar covers the unique taxation issues that apply to groups of privately held companies and their access to the small business deduction.</p>	<p>Oct-27 Nov-09 &amp; Nov-10</p>	<p>9am-5pm 9am-12:30pm</p>	<p><b>In-Person, Vancouver</b>  Live Webinar</p>	
	<p><b>Corporate Tax - SR&amp;ED Part 1</b> This course addresses fundamental content on SR&amp;ED. Participants are provided information and skills required to navigate the SR&amp;ED claim process including: who is eligible, what types of work are eligible, and how the SR&amp;ED program intersects with other government subsidies and stimulus payments. Part 1 covers the preparation of SR&amp;ED claims and how to incorporate these claims into corporation tax returns. For advanced content on SR&amp;ED, please see Corporate Tax - SR&amp;ED Part 2.</p>	<p>Nov-03</p>	<p>9am-12:30pm</p>	<p>Live Webinar</p>	

# SEMINAR SCHEDULE CATEGORY & TITLE

<p><b>ACCOUNTING &amp; ASSURANCE</b>          Audit &amp; Assurance          Financial Reporting          Management Accounting</p>	<p><b>Corporate Tax – SR&amp;ED Part 2</b>          This course builds on the fundamental content of Part 1 and presents more advanced content on SR&amp;ED. Participants are provided information and skills required to navigate the SR&amp;ED claim process including: who is eligible, what types of work are eligible and how the SR&amp;ED program intersects with other government subsidies and stimulus payments. Part 2 focuses on current issues including updates to legislation and case law, CCPC status, government assistance, materials and ITC recapture.</p>	Nov-03	1:30pm-5pm	Live Webinar
<p><b>ETHICS</b></p>	<p><b>Current Strategies in Tax Dispute</b>          This half-day seminar is designed to introduce practitioners to the CRA dispute resolution process, and to provide an understanding of the importance of taking the appropriate steps as a means of obtaining cost-effective and efficient resolution to potential tax litigation matters.</p>	Dec-14	9am-12:30pm	Live Webinar
<p><b>FINANCE &amp; ECONOMICS</b>          Business Valuations          Corporate Finance          Financial Modelling</p>	<p><b>Income Tax - 5 Years of Developments</b>          Income tax changes and evolves over time and professionals need to maintain their current stock of knowledge while learning about new trends. This seminar provides an opportunity for those who lack the ability to remain updated on continual changes by reviewing the most important federal income tax developments that have occurred over the last five years. Participants can quickly become knowledgeable about crucial tax updates in a single seminar.</p>	Dec-14	9am-5pm	Live Webinar
<p><b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b>          Communication &amp; Negotiation          Self Management &amp; Wellness          Teamwork &amp; Leadership          Resilient Leadership          Certificate Program</p>	<p><b>Income Tax - Administration and Risk Management</b>          This seminar focuses on the procedures and processes of practicing tax, highlighting areas to protect practitioners from liability. The seminar discusses technical issues in areas where CPA Professional Liability Plan claims show the greatest number and dollar value of claims. The session will also review the scheme of penalties and interest in the Act, the CRA's current administration of those provisions, and the use of the Taxpayer Relief provisions to reduce the cost of penalties.</p>	Nov-02	9am-5pm	Live Webinar
<p><b>PRACTICE MANAGEMENT</b></p> <p><b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b>          Risk Management &amp; Fraud          Strategy, Governance, &amp; Human Resource          Strategic &amp; Advanced          Strategic Management          Certificate Programs</p>	<p><i>Online</i>  <i>On-demand</i>  <i>available</i></p>	<p><i>Online</i>  <i>On-demand</i>  <i>available</i></p>	<p><i>Online</i>  <i>On-demand</i>  <i>available</i></p>	<p><i>Online</i>  <i>On-demand</i>  <i>available</i></p>
<p><b>TAXATION</b>          Commodity Tax</p>	<p><b>Corporate &amp; Personal Tax</b>          Not-For-Profit Organizations          Trusts &amp; Estates          US &amp; International Taxation</p>	<p><b>TECHNOLOGY &amp; INNOVATION</b>          Business Transformation &amp; Emerging Issues          Software &amp; Tools</p>	<p><b>WEALTH MANAGEMENT</b></p>	<p><b>PD NEXUS DAYS</b></p>

## SEMINAR SCHEDULE CATEGORY & TITLE

Category	Title	Date	Time	Format
<b>ACCOUNTING &amp; ASSURANCE</b> Audit & Assurance Financial Reporting Management Accounting  <b>ETHICS</b>  <b>FINANCE &amp; ECONOMICS</b> Business Valuations Corporate Finance Financial Modelling  <b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b> Communication & Negotiation Self Management & Wellness Teamwork & Leadership Resilient Leadership Certificate Program  <b>PRACTICE MANAGEMENT</b>  <b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b> Risk Management & Fraud Strategy, Governance, & Human Resource Strategic & Advanced Strategic Management Certificate Programs  <b>TAXATION</b> Commodity Tax <b>Corporate &amp; Personal Tax</b> Not-For-Profit Organizations Trusts & Estates US & International Taxation  <b>TECHNOLOGY &amp; INNOVATION</b> Business Transformation & Emerging Issues Software & Tools  <b>WEALTH MANAGEMENT</b>  <b>PD NEXUS DAYS</b>	<b>Income Tax - Advanced Planning Strategies</b> The seminar identifies tax-planning opportunities relevant to practitioners working with Canadian private corporations and high-net-worth individuals. It presents planning opportunities with respect to restructuring of asset profiles, the sale of a business, business succession and estate planning as well as the use of partnerships and trusts. Participants will gain a high-level view of anti-avoidance provisions frequently encountered in the context of these plans, primarily in the context of specific plans or examples.	Nov-08 Nov-18  Dec-09 Feb-11  <i>Online</i> <i>On-demand available</i>	9am-5pm 9am-5pm  9am-5pm 9am-5pm  9am-5pm	Live Webinar <b>In-Person, Vancouver</b> Live Webinar Live Webinar  Live Webinar
	<b>Income Tax - Consequences to Avoid</b> Straightforward and seemingly benign situations can sometimes trigger adverse income tax repercussions and this seminar will equip participants with the skills to identify, prevent, and manage these outcomes. This seminar explains the income tax rules and reasons behind the negative result ensuing from particular situations. Participants will receive suggestions to manage and mitigate problems, as well as tips for recognizing relevant precursors and triggers.	Nov-24  <i>Online</i> <i>On-demand available</i>	9am-5pm	Live Webinar
	<b>Income Tax - Employee Benefits</b> This seminar provides a review of the income tax implications for benefits, including cases of owner-managers and arm's length employees. Participants will increase their ability to advise on tax-effective employee remuneration strategies with benefits plans by assessing the tax-effectiveness of various benefit plans and employment benefit choices as well as ensuring compliance with the tax rules.	Nov-15  <i>Online</i> <i>On-demand available</i>	9am-12:30pm	Live Webinar
	<b>NEW Income Tax - Employee vs. Contractor</b> This seminar provides detailed information on the difference in the designation of individuals as contractors vs. employees for tax purposes from both the corporate and individual perspectives. Tax rates, CRA guidelines, and considerations as well as case law examples will be covered and then case studies will be used to allow for participant application.	Oct-25 Feb-04  <i>Online</i> <i>On-demand available</i>	9am-5pm 9am-5pm	Live Webinar Live Webinar

## SEMINAR SCHEDULE CATEGORY & TITLE

<b>ACCOUNTING &amp; ASSURANCE</b> Audit & Assurance Financial Reporting Management Accounting  <b>ETHICS</b>  <b>FINANCE &amp; ECONOMICS</b> Business Valuations Corporate Finance Financial Modelling  <b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b> Communication & Negotiation Self Management & Wellness Teamwork & Leadership Resilient Leadership Certificate Program  <b>PRACTICE MANAGEMENT</b>  <b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b> Risk Management & Fraud Strategy, Governance, & Human Resource Strategic & Advanced Strategic Management Certificate Programs  <b>TAXATION</b> Commodity Tax <b>Corporate &amp; Personal Tax</b> Not-For-Profit Organizations Trusts & Estates US & International Taxation  <b>TECHNOLOGY &amp; INNOVATION</b> Business Transformation & Emerging Issues Software & Tools  <b>WEALTH MANAGEMENT</b>  <b>PD NEXUS DAYS</b>	<b>Income Tax - Everyday Issues for General Practitioners</b> 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.	Oct-22  Nov-16  Nov-26 Jan-26  <i>Online</i> <i>On-demand available</i>	9am-5pm  9am-5pm  9am-5pm 9am-5pm  Online On-demand available	<b>In-Person, Vancouver</b> <b>In-Person, Vancouver</b> Live Webinar Live Webinar  Online On-demand available
	<b>Income Tax - Income Splitting, A New Era</b> The Income Tax Act contains several measures related to income splitting; and while some are permissive, most are restrictive. This full-day 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.	Nov-02 Nov-15 Dec-09  Feb-03  <i>Online</i> <i>On-demand available</i>	9am-5pm 9am-5pm 9am-5pm  9am-5pm  Online On-demand available	Live Webinar Live Webinar <b>In-Person, Vancouver</b> Live Webinar
	<b>Income Tax - Partnerships</b> The taxation of partnerships and their partners is quite different from that of corporations and their shareholders. This course reviews the manner in which partnerships and their partners are taxed, and provides participants with improved understanding of the “what” and “why” issues in preparing returns, to better advise and serve their clients or employers with partnerships.	Nov-05 Dec-07  Feb-08  <i>Online</i> <i>On-demand available</i>	9am-5pm 9am-5pm  9am-5pm  Online On-demand available	Live Webinar <b>In-Person, Vancouver</b> Live Webinar
	<b>Income Tax - Planning for Business Succession</b> 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.	Oct-27  Dec-14  <i>Online</i> <i>On-demand available</i>	9am-5pm  9am-5pm  Online On-demand available	<b>In-Person, Vancouver</b> Live Webinar

# SEMINAR SCHEDULE CATEGORY & TITLE

Category	Title	Date	Time	Format
ACCOUNTING & ASSURANCE Audit & Assurance Financial Reporting Management Accounting	<b>Income Tax - Principal Residences</b> Many Canadians own a principal residence, but they often assume that the gain on the sale of their home is tax free and may lack an understanding about the tax implications of other transactions involving these properties. This seminar examines all aspects of principal residences from a federal tax perspective, including ambiguous situation and the unexpected issues or outcomes that can arise in such cases.	Nov-03	9am-12:30pm	Live Webinar
		Nov-10	9am-12:30pm	<b>In-Person, Vancouver</b>
		Jan-18	9am-12:30pm	Live Webinar
ETHICS				
FINANCE & ECONOMICS Business Valuations Corporate Finance Financial Modelling	<b>Income Tax - Real Estate</b> 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.	Nov-15	9am-5pm	Live Webinar
		Nov-25	9am-5pm	<b>In-Person, Vancouver</b>
		Jan-20	9am-5pm	Live Webinar
PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT Communication & Negotiation Self Management & Wellness Teamwork & Leadership Resilient Leadership Certificate Program				
PRACTICE MANAGEMENT	<b>NEW Income Tax - Salary vs. Dividends</b> This seminar provides detailed information on tax differences of salary and dividends as compensation from both a shareholder and a corporate perspective. Participants will work through case studies to understand and calculate the different tax effects of a variety of corporate situations and tax rates to showcase the different dividend options available and tax effects for both types of compensation.	Oct-28	9am-12:30pm	Live Webinar
		Dec-10	9am-12:30pm	<b>In-Person, Vancouver</b>
STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE Risk Management & Fraud Strategy, Governance, & Human Resource Strategic & Advanced Strategic Management Certificate Programs				
TAXATION	<b>Income Tax - Starting Up a Business</b> This seminar focuses on the many tax issues that arise – both compliance and planning related – when starting a business. Common traps and planning opportunities for private companies are reviewed. Starting with an overview of forms of business, including pros and cons of each, the seminar will present structuring decisions for tax efficiency and to preserve access to losses. Participants will also gain an understanding of planning opportunities in the start-up phase and employee issues.		3.5 Hours	Online On-demand Only
Commodity Tax				
<b>Corporate &amp; Personal Tax</b> Not-For-Profit Organizations Trusts & Estates US & International Taxation				
TECHNOLOGY & INNOVATION Business Transformation & Emerging Issues Software & Tools				
WEALTH MANAGEMENT				
PD NEXUS DAYS				



# SEMINAR SCHEDULE CATEGORY & TITLE

Category	Title	Dates	Time	Format
ACCOUNTING & ASSURANCE Audit & Assurance Financial Reporting Management Accounting	<b>Personal Tax - Compliance and Planning in T1 Preparation</b> This seminar addresses technical and practical issues arising from the diverse issues encountered in the preparation and review of Canadian personal income tax returns. Participants will gain an overall understanding of tax compliance issues, enhancing their ability to prepare complete and accurate tax returns, and to identify and address planning opportunities which arise in the preparation of personal income tax returns.	Dec-16	9am-5pm	Live Webinar
		Jan-21	9am-5pm	Live Webinar
ETHICS				<i>Online On-demand available</i>
FINANCE & ECONOMICS Business Valuations Corporate Finance Financial Modelling	<b>Personal Tax - Review of Tax Planning</b> This two-day seminar in personal tax is designed for those who desire to update and refresh their knowledge in both technical and tax planning issues for individuals, trusts, and partnerships, with a primary focus on the taxation of individuals.	Two-segments Nov-04 & Nov-05	9am-5pm	Live Webinar
		Feb-21 & Feb-22	9am-5pm	Live Webinar
PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT Communication & Negotiation Self Management & Wellness Teamwork & Leadership Resilient Leadership Certificate Program				<i>Online On-demand available</i>
PRACTICE MANAGEMENT	<b>Probate Fee Avoidance Planning</b> Review the fundamentals of when and why probate is required, and what property is subject to the process. Examine the various strategies that can be employed to avoid probate fees, and learn how individual strategies complement or hinder the achievement of other estate planning goals.	Feb-23	8am-10am	Live Webinar
STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE Risk Management & Fraud Strategy, Governance, & Human Resource Strategic & Advanced Strategic Management Certificate Programs				
<b>TAXATION</b>				
<b>Corporate &amp; Personal Tax</b> Not-For-Profit Organizations Trusts & Estates US & International Taxation	<b>Tax for Controllers</b> Controllers in small to mid-sized private companies have a wide range of responsibilities which can either have an impact on taxation or require tax-related reporting. This two-day course is compliance oriented with a high-level review of a wide range of issues and a focus on issue identification.	Four Segments Nov-02, Nov-03, Nov-04 & Nov-05	9am-12:30pm	Live Webinar
TECHNOLOGY & INNOVATION Business Transformation & Emerging Issues Software & Tools				<i>Online On-demand available</i>
WEALTH MANAGEMENT				
PD NEXUS DAYS				

<p><b>ACCOUNTING &amp; ASSURANCE</b> Audit &amp; Assurance Financial Reporting Management Accounting</p> <p><b>ETHICS</b></p> <p><b>FINANCE &amp; ECONOMICS</b> Business Valuations Corporate Finance Financial Modelling</p> <p><b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b> Communication &amp; Negotiation Self Management &amp; Wellness Teamwork &amp; Leadership Resilient Leadership Certificate Program</p> <p><b>PRACTICE MANAGEMENT</b></p> <p><b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b> Risk Management &amp; Fraud Strategy, Governance, &amp; Human Resource Strategic &amp; Advanced Strategic Management Certificate Programs</p> <p><b>TAXATION</b> Commodity Tax Corporate &amp; Personal Tax <b>Not-For-Profit Organizations</b> <b>Trusts &amp; Estates</b> US &amp; International Taxation</p> <p><b>TECHNOLOGY &amp; INNOVATION</b> Business Transformation &amp; Emerging Issues Software &amp; Tools</p> <p><b>WEALTH MANAGEMENT</b></p> <p><b>PD NEXUS DAYS</b></p>	<b>NOT-FOR-PROFIT ORGANIZATIONS</b>				
	<p><b>Taxation - Registered Charities and NFPOs</b></p> <p>This seminar will provide a detailed technical review of the numerous income tax issues faced by registered charities and NFPOs, including real-world examples and case studies to provide participants with practical and useful takeaways to avoid loss of tax status, financial penalties, and bad press. Participants will gain the ability to identify tax issues, assess related risks, comply with the income tax rules, and complete charity and not-for-profit organization returns.</p>	<p>Nov-10 Dec-06</p>	<p>9am-5pm 9am-5pm</p>	<p>Live Webinar <b>In-Person, Vancouver</b></p>	<p><i>Online On-demand available</i></p>
	<b>TRUSTS &amp; ESTATES</b>				
	<p><b>RIP - Estate and Testamentary Trust Returns</b></p> <p>This seminar provides a review of the issues faced when preparing trust filings for deceased taxpayers. The focus is on the preparation of returns and related planning, including a review of relevant tax issues, engagement management, up-to-date sources of tax research, and CRA assessing practices. The seminar presents a series of practice case studies to illustrate the concepts in a practical manner and allows the participant to apply their knowledge to realistic filing situations commonly encountered in practice.</p>	<p>Nov-10</p>	<p>9am-5pm</p>	<p>Live Webinar</p>	<p><i>Online On-demand available</i></p>
	<p><b>RIP - Estate Planning</b></p> <p>This seminar provides a detailed review of important estate planning matters for practitioners who deal with owner-managers or clients with a high net worth. Participants will gain enhanced estate planning skills, an introduction to important tax and estate planning concepts, useful tips, and an updated reference source. Participants will develop a working understanding of how to initiate and undertake effective estate planning for clients while maintaining flexibility in the estate plan to manage risk.</p>	<p>Nov-12 Dec-01 Feb-18</p>	<p>9am-5pm 9am-5pm 9am-5pm</p>	<p><b>In-Person, Vancouver</b> Live Webinar Live Webinar</p>	<p><i>Online On-demand available</i></p>

## SEMINAR SCHEDULE CATEGORY & TITLE

Category	Topic	Date	Time	Format	
<b>ACCOUNTING &amp; ASSURANCE</b> Audit & Assurance Financial Reporting Management Accounting  <b>ETHICS</b>  <b>FINANCE &amp; ECONOMICS</b> Business Valuations Corporate Finance Financial Modelling  <b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b> Communication & Negotiation Self Management & Wellness Teamwork & Leadership Resilient Leadership Certificate Program  <b>PRACTICE MANAGEMENT</b>  <b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b> Risk Management & Fraud Strategy, Governance, & Human Resource Strategic & Advanced Strategic Management Certificate Programs  <b>TAXATION</b> Commodity Tax Corporate & Personal Tax Not-For-Profit Organizations <b>Trusts &amp; Estates</b> US & International Taxation  <b>TECHNOLOGY &amp; INNOVATION</b> Business Transformation & Emerging Issues Software & Tools  <b>WEALTH MANAGEMENT</b>  <b>PD NEXUS DAYS</b>	<b>RIP - Terminal Filing</b> The last tax return for a deceased individual carries significant implications for the executor and the inheritors of the will. In order to alleviate potential misunderstandings, this seminar provides a detailed technical review of the numerous issues faced when preparing terminal or year-of-death filings. Participants will receive a review of relevant tax issues, engagement management, updated sources of tax research, an overview of CRA assessing practices, and case studies.	Oct-27	9am-5pm	Live Webinar	
		<b>Taxation of Domestic Trusts - Advanced</b> This seminar will cover tax issues surrounding family trusts, with a focus on complex tax planning opportunities and tax traps to assist participants with the move from a compliance-based trusts practice to an advisory-based practice. Participants who advise clients with trust structures, or who are considering trust structures, will gain an understanding of the opportunities that may be available and learn to identify potential issues in the course of preparing returns.	Dec-09	9am-5pm	In-Person, Vancouver
		<b>Taxation of Domestic Trusts - Fundamentals</b> This seminar will provide an overview of trust relationships, how to complete basic returns for trusts and their beneficiaries, and how to identify and communicate basic tax planning benefits and opportunities that involve family trusts. Participants who prepare trust returns or who advise clients with trust structures, or who are considering trust structures, will gain a functional knowledge of the applicable tax rules and the ability to identify potential problems.	Nov-19 Jan-18	9am-5pm 9am-5pm	In-Person, Vancouver Live Webinar

## SEMINAR SCHEDULE CATEGORY & TITLE

<p><b>ACCOUNTING &amp; ASSURANCE</b> Audit &amp; Assurance Financial Reporting Management Accounting</p>	<p><b>To Be or Not To Be: The Executor - Powers, Obligations, and Liabilities</b> Gain sufficient knowledge so that you or your clients can make informed decisions as to whether you or they should take on the executor's role. Learn and examine the stages of estate administration from date of death through to distribution, final accounting, and release.</p>	<p>Nov-10</p>	<p>8am-10am</p>	<p>Live Webinar</p>
<p><b>ETHICS</b></p> <p><b>FINANCE &amp; ECONOMICS</b> Business Valuations Corporate Finance Financial Modelling</p>	<p><b>US &amp; INTERNATIONAL TAXATION</b></p>			
<p><b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b> Communication &amp; Negotiation Self Management &amp; Wellness Teamwork &amp; Leadership Resilient Leadership Certificate Program</p>	<p><b>US Corporate Tax - Fundamentals</b> 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>Feb-10</p>	<p>9am-5pm</p>	<p>Live Webinar</p>
<p><b>PRACTICE MANAGEMENT</b></p> <p><b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b> Risk Management &amp; Fraud Strategy, Governance, &amp; Human Resource Strategic &amp; Advanced Strategic Management Certificate Programs</p>	<p><b>US Personal Tax - Fundamentals</b> 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>Feb-09</p>	<p>9am-5pm</p>	<p>Live Webinar</p>
<p><b>TAXATION</b> Commodity Tax Corporate &amp; Personal Tax Not-For-Profit Organizations</p> <p><b>Trusts &amp; Estates</b> <b>US &amp; International Taxation</b></p>				
<p><b>TECHNOLOGY &amp; INNOVATION</b> Business Transformation &amp; Emerging Issues Software &amp; Tools</p>				
<p><b>WEALTH MANAGEMENT</b></p>				
<p><b>PD NEXUS DAYS</b></p>				

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

**ETHICS**

**FINANCE & ECONOMICS**  
 Business Valuations  
 Corporate Finance  
 Financial Modelling

**PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT**  
 Communication & Negotiation  
 Self Management & Wellness  
 Teamwork & Leadership  
 Resilient Leadership  
 Certificate Program

**PRACTICE MANAGEMENT**

**STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE**  
 Risk Management & Fraud  
 Strategy, Governance, & Human Resource  
 Strategic & Advanced Strategic Management  
 Certificate Programs

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

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

**WEALTH MANAGEMENT**

**PD NEXUS DAYS**

## TECHNOLOGY & INNOVATION

### BUSINESS TRANSFORMATION & EMERGING ISSUES

<b>2021 Technology Update</b>	Nov-08	9am-12:30pm	Live Webinar
Are you ready to learn about the latest trends in technology? Do you sometimes feel lost in the technology jungle? Would you like clear guidance regarding Windows, Office, the cloud, security, and other technology-related issues? This fast-paced and highly informative seminar is sure to ramp up your return on technology investment.			
<b>NEW 3 Ways Digital Transformation is Reinventing Accounting</b>	Dec-02	9am-12:30pm	Live Webinar
Digital Transformation is shaping the future of accounting and the pace of digital change is faster than ever. No accountant can ignore the onslaught of AI, Automation and Big Data and during this session you will learn how technology is transforming accounting and what you can do to future proof your finance career.			
<b>Blockchain Essentials for CPAs</b>	Nov-24	1:30pm-5pm	Live Webinar
Digital Transformation is shaping the future of accounting and the pace of digital change is faster than ever. No accountant can ignore the onslaught of AI, Automation and Big Data and during this session you will learn how technology is transforming accounting and what you can do to future proof your finance career.			
» <b>INSTRUCTORS</b> This course is led by <a href="#">Tejinder Basi</a> and <a href="#">Chris Rowell</a> , read their article online at <a href="http://bccpa.ca">bccpa.ca</a> .			
<b>Cloud Computing</b>	Two segments Dec-14 & Dec-15	9am-12:30pm	Live Webinar
Learn the fundamentals of cloud computing, the necessary skills to determine if cloud computing might be right for your organization or for your clients, and how to migrate to cloud-based solutions while avoiding major pitfalls along the way.			

## SEMINAR SCHEDULE CATEGORY & TITLE

Category	Title	Dates	Time	Format
ACCOUNTING & ASSURANCE Audit & Assurance Financial Reporting Management Accounting	<b>Data Analytics and the Future of Finance</b> This interactive course addresses the importance of analytics to the future role of finance, the challenges and the opportunities for teams and individuals. It introduces key analytics processes, techniques, tools and application - using examples and case studies, and covers key issues such as data availability, governance, skills required, role of technology vs. people, and the reality of what “Artificial Intelligence” or Machine Learning can or cannot do.	Two segments Nov-08 & Nov-10	9am-1pm	Live Webinar
		Feb-03 & Feb-08	9am-1pm	Live Webinar
ETHICS				
FINANCE & ECONOMICS Business Valuations Corporate Finance Financial Modelling				
PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT Communication & Negotiation Self Management & Wellness Teamwork & Leadership Resilient Leadership Certificate Program				
PRACTICE MANAGEMENT				
STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE Risk Management & Fraud Strategy, Governance, & Human Resource Strategic & Advanced Strategic Management Certificate Programs				
TAXATION Commodity Tax Corporate & Personal Tax Not-For-Profit Organizations Trusts & Estates US & International Taxation				
<b>TECHNOLOGY &amp; INNOVATION</b> <b>Business Transformation &amp; Emerging Issues</b> Software & Tools	<b>Emerging Technologies for Accountants, Including Blockchain and Cryptocurrencies</b> 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.	Oct-21	9am-12:30pm	Live Webinar
WEALTH MANAGEMENT				
PD NEXUS DAYS				
	<b>Foundations of Blockchain</b> 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.	Nov-24	9am-12:30pm	Live Webinar
	<b>Securing Your Data - Practical Tools for Protecting Information</b> Learn about the latest tools and techniques for securing your data, including encryption, virus protection, secure communications, electronic signatures, secure authentication, and more. Discover how to implement a very practical, five-step approach to securing your PC, and the types of questions you should ask your staff to ensure server-based information remains protected.	Dec-02	9am-12:30pm	Live Webinar

## SEMINAR SCHEDULE CATEGORY & TITLE

<b>ACCOUNTING &amp; ASSURANCE</b> Audit & Assurance Financial Reporting Management Accounting	<b>Technology for CPAs - Don't Get Left Behind</b> Survey today's IT environment, learning about computer hardware, software (including Office 2019), operating systems (including Windows 10), and what they mean for you and peripheral devices. Learn about significant trends in information technology and how to take advantage of the opportunities presented by these trends. Learn from real-time demonstrations of practical applications of the latest tools which can provide you with knowledge you need to harness the power of technology.	Nov-15	9am-5pm	Live Webinar
<b>ETHICS</b>				
<b>FINANCE &amp; ECONOMICS</b> Business Valuations Corporate Finance Financial Modelling				
<b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b> Communication & Negotiation Self Management & Wellness Teamwork & Leadership Resilient Leadership Certificate Program				
<b>PRACTICE MANAGEMENT</b>				
<b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b> Risk Management & Fraud Strategy, Governance, & Human Resource Strategic & Advanced Strategic Management Certificate Programs				
<b>TAXATION</b> Commodity Tax Corporate & Personal Tax Not-For-Profit Organizations Trusts & Estates US & International Taxation				
<b>TECHNOLOGY &amp; INNOVATION</b> Business Transformation & Emerging Issues Software & Tools	<b>SOFTWARE &amp; TOOLS</b>			
<b>WEALTH MANAGEMENT</b>				
<b>PD NEXUS DAYS</b>				
	<b>Advanced Excel</b> For experienced Excel users seeking to elevate your skills, this seminar will provide critical advanced Excel skills in six key areas: collaborating, using tables, external source data, complex formulas, advanced data analysis tools, and visualization techniques.	Two segments Nov-03 & Nov-04	9am-12:30pm	Live Webinar
	<b>Advanced Excel Data Magic</b> With tools such as Data Models, Power Query, and Power Pivot, today's versions of Excel offer unparalleled opportunities to move beyond traditional reporting techniques. If you are interested in advancing your reporting processes and minimizing your dependence on formulas, then this is the one class you cannot afford to miss.	Two segments Nov-22 & Nov-23	9am-12:30pm	Live Webinar
	<b>An End to Manual Effort in Excel: The Power Query Effect</b> In this course, you'll learn how Power Query can clean up, reshape, and combine your data with ease. Converting ASCII files into tables, combining multiple text files in one shot, and even un-pivoting data is not only simple, but an investment in the future, refreshable with a single click when next needed.	Nov-03 Nov-23	9am-5pm 9am-5pm	Live Webinar <b>In-Person, Vancouver</b>

## SEMINAR SCHEDULE CATEGORY & TITLE

<b>ACCOUNTING &amp; ASSURANCE</b> Audit & Assurance Financial Reporting Management Accounting	<b>Best Word, Outlook, and PowerPoint Features</b> Most professionals routinely use Word, Outlook, and PowerPoint, but many are self-taught and often use inefficient techniques. If that describes you, then make sure to attend this seminar to learn how you can work much more efficiently when using these tools.	Nov-16	9am-12:30pm	Live Webinar
<b>ETHICS</b>				
<b>FINANCE &amp; ECONOMICS</b> Business Valuations Corporate Finance Financial Modelling	<b>Business Intelligence, Featuring Microsoft's Power BI Tools</b> Learn how to implement "do it yourself business intelligence" using a variety of techniques and tools, such as Excel's advanced data query and summarization features. Join us for a fast-paced look at how you can take advantage of these fantastic tools to gain greater insights into your data for better decision making.	Two segments Dec-07 & Dec-08	9am-12:30pm	Live Webinar
<b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b> Communication & Negotiation Self Management & Wellness Teamwork & Leadership Resilient Leadership Certificate Program				
<b>PRACTICE MANAGEMENT</b>				
<b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b> Risk Management & Fraud Strategy, Governance, & Human Resource Strategic & Advanced Strategic Management Certificate Programs	<b>NEW Creating Financial Statements in Excel Power Pivot</b> In this course we will explore the data structure and measures required to build financial statements using the DAX formula language. We will start by reviewing the required Chart of Account setup and follow this with key DAX patterns for creating Profit and Loss, Balance Sheet, Statement of Cash Flow, and Expected Actuals statements.	Feb-23	9am-5pm	Live Webinar
<b>TAXATION</b> Commodity Tax Corporate & Personal Tax Not-For-Profit Organizations Trusts & Estates US & International Taxation	<b>Creating Vibrant Dashboards</b> 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.	Dec-13	9am-5pm	Live Webinar
<b>TECHNOLOGY &amp; INNOVATION</b> Business Transformation & Emerging Issues	<b>Data Visualization and Mapping Tools for Accountants</b> Obtain a concise overview of more than 200 data visualization tools which can be used by accountants to enhance the visual appeal of their financial work. All resources are easy-to-use web-based applications that require virtually no artistic or design skill - simply drag and drop, point and click, cut and paste, and/or edit text.	Dec-01	9am-12:30pm	Live Webinar
<b>Software &amp; Tools</b>				
<b>WEALTH MANAGEMENT</b>				
<b>PD NEXUS DAYS</b>				

## SEMINAR SCHEDULE CATEGORY & TITLE

<b>ACCOUNTING &amp; ASSURANCE</b> Audit & Assurance Financial Reporting Management Accounting	<b>DAX Formulas for Power Pivot</b> Up your DAX game so that you can make your PivotTables show the exact aggregations you need. From creating simple measures to controlling percent of grand totals which don't lose their context upon filtering, to advanced patterns to control date period intelligence, we'll cover it here.	Dec-15	9am-5pm	Live Webinar
<b>ETHICS</b>  <b>FINANCE &amp; ECONOMICS</b> Business Valuations Corporate Finance Financial Modelling	<b>Excel 1: Core Data Analysis</b> 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.	Oct-25	9am-5pm	Live Webinar
<b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b> Communication & Negotiation Self Management & Wellness Teamwork & Leadership Resilient Leadership Certificate Program	<b>Excel 365: Advanced Data Analysis</b> 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.	Dec-02	9am-12:30pm	Live Webinar
<b>PRACTICE MANAGEMENT</b>  <b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b> Risk Management & Fraud Strategy, Governance, & Human Resource Strategic & Advanced Strategic Management Certificate Programs	<b>Excel Best Practices</b> Gain an in-depth understanding of the best ways to work with Excel by learning best practices associated with Excel spreadsheets in each of the following areas: creating and editing Excel workbooks, securing Excel workbooks, collaborating with others in Excel, and reporting on data contained in Excel. Ensure that you utilize Excel to its fullest potential.	Two segments Feb-09 & Feb-10	9am-12:30pm	Live Webinar
<b>TECHNOLOGY &amp; INNOVATION</b> Business Transformation & Emerging Issues <b>Software &amp; Tools</b>				
<b>WEALTH MANAGEMENT</b>  <b>PD NEXUS DAYS</b>				

## SEMINAR SCHEDULE CATEGORY & TITLE

<b>ACCOUNTING &amp; ASSURANCE</b> Audit & Assurance Financial Reporting Management Accounting	<b>Excel Boot Camp</b> If you are ready for intensive Excel training, then this course is for you. Using accounting-centric examples, developed for and by accountants, this course takes you through Excel from A to Z and shows you how to take your use of Excel to the next level.	Four segments Nov-17, Nov-18, Nov-24 & Nov-25	9am-12:30pm	Live Webinar
	<b>Excel Charting and Visualizations</b> Learn how to create advanced charts that are interactive, dynamic, and aesthetically pleasing – three qualities that will help to ensure that your audience will understand the data you are presenting. Create visualizations that will effectively communicate your data.	Oct-29	9am-12:30pm	Live Webinar
<b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b> Communication & Negotiation Self Management & Wellness Teamwork & Leadership Resilient Leadership Certificate Program	<b>Excel Financial Models and Analysis</b> 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.	Nov-04 Dec-10 Mar-10	9am-5pm 9am-5pm 9am-5pm	<b>In-Person, Vancouver</b> Live Webinar <b>In-Person, Vancouver</b>
	<b>Excel: Specific Skills for Budgeting, Planning &amp; Forecasting</b> 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.	Nov-25 Dec-16	9am-5pm 9am-5pm	<b>In-Person, Vancouver</b> Live Webinar
<b>TECHNOLOGY &amp; INNOVATION</b> Business Transformation & Emerging Issues <b>Software &amp; Tools</b>	<b>Excel: The Next Level of Skills</b> 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.	Oct-21 Oct-28 Dec-09 Feb-18	9am-5pm 9am-5pm 9am-5pm 9am-5pm	Live Webinar In-Person, Vancouver Live Webinar <b>In-Person, Vancouver</b>
	<b>WEALTH MANAGEMENT</b>  <b>PD NEXUS DAYS</b>			

## SEMINAR SCHEDULE CATEGORY & TITLE

<b>ACCOUNTING &amp; ASSURANCE</b> Audit & Assurance Financial Reporting Management Accounting	<b>Getting Started with Excel Power Pivot</b> Linking data from multiple sources, while powerful, only scratches the surface of the impact that Power Pivot is making in the business intelligence landscape. Learn the right way to use Power Pivot in this hands-on course developed by a CPA and business intelligence (BI) expert with real-world experience.	Dec-08	9am-5pm	Live Webinar
<b>ETHICS</b>  <b>FINANCE &amp; ECONOMICS</b> Business Valuations Corporate Finance Financial Modelling	<b>Google Business Tools for Accountants</b> 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.	Nov-30	9am-5pm	Live Webinar
<b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b> Communication & Negotiation Self Management & Wellness Teamwork & Leadership Resilient Leadership Certificate Program	<b>Google is Not Enough: The Best Search Tools You Aren't Using (But Should!)</b> 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.	Feb-08	9am-5pm	Live Webinar
<b>PRACTICE MANAGEMENT</b>  <b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b> Risk Management & Fraud Strategy, Governance, & Human Resource Strategic & Advanced Strategic Management Certificate Programs	<b>NEW Health Check for Your Financial Systems and Processes</b> 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.	Oct-27	8am-10am	Live Webinar
<b>TAXATION</b> Commodity Tax Corporate & Personal Tax Not-For-Profit Organizations Trusts & Estates US & International Taxation				
<b>TECHNOLOGY &amp; INNOVATION</b> Business Transformation & Emerging Issues <b>Software &amp; Tools</b>				
<b>WEALTH MANAGEMENT</b>  <b>PD NEXUS DAYS</b>				

## SEMINAR SCHEDULE CATEGORY & TITLE

<b>ACCOUNTING &amp; ASSURANCE</b> Audit & Assurance Financial Reporting Management Accounting	<b>Internet of Things for Accountants</b> The course provides a concise overview of the Internet of Things (IoT), a global ecosystem of advanced technologies that connect objects to the Internet, each other, and people. Discover how new IoT apps and devices are being used to increase operational efficiency, develop post-transaction relationships, and create new revenue streams in enterprises worldwide.	Feb-15	9am-12:30pm	Live Webinar
<b>ETHICS</b>  <b>FINANCE &amp; ECONOMICS</b> Business Valuations Corporate Finance Financial Modelling	<b>Introduction to Excel Macros</b> Designed for those with little, if any, experience working with macros, this course will teach the fundamentals of creating and working with macros in Excel. More specifically, you will learn how to use Excel's Macro Recorder to write simple yet effective macros; how to secure and share macros with other Excel users; how to create user-defined functions to solve specific accountant-centric problems in Excel; and how to create macros that run automatically when a user opens a workbook.	Nov-02	9am-12:30pm	Live Webinar
<b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b> Communication & Negotiation Self Management & Wellness Teamwork & Leadership Resilient Leadership Certificate Program	<b>Intro-Mediate Excel Techniques</b> Did you know that there are almost always three ways to do everything in Excel? Are you using the most efficient method possible to get things done? This "intro-mediate" Excel course is designed to quickly review the basics, giving you a solid review of techniques that you should know to be efficient, but may have missed in your own education. Once the basics are covered, we'll also jump into more advanced tools and techniques that you'll be able to take back to your daily work.	Nov-24	9am-5pm	<b>In-Person,            Vancouver</b> Live Webinar
<b>PRACTICE MANAGEMENT</b>  <b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b> Risk Management & Fraud Strategy, Governance, & Human Resource Strategic & Advanced Strategic Management Certificate Programs		Feb-22	9am-5pm	
<b>TAXATION</b> Commodity Tax Corporate & Personal Tax Not-For-Profit Organizations Trusts & Estates US & International Taxation				
<b>TECHNOLOGY &amp; INNOVATION</b> Business Transformation & Emerging Issues				
<b>Software &amp; Tools</b>				
<b>WEALTH MANAGEMENT</b>				
<b>PD NEXUS DAYS</b>				

# SEMINAR SCHEDULE CATEGORY & TITLE

<b>ACCOUNTING &amp; ASSURANCE</b> Audit & Assurance Financial Reporting Management Accounting	<b>Microsoft Office 365 - All the Things You Need to Know</b> Microsoft Office 365 continues to grow and evolve, yet most Office 365 users are utilizing only a fraction of the tools available in their subscription. Powerful resources such as SharePoint Online and Microsoft Teams can change how your entire organization communicates and collaborates, while more personal apps such as Planner, Flow, and Sway allow individuals to work more efficiently and effectively in virtually all facets of their jobs. Learn the things you need to know to be truly successful with Office 365.	Nov-09	9am-12:30pm	Live Webinar
<b>ETHICS</b>  <b>FINANCE &amp; ECONOMICS</b> Business Valuations Corporate Finance Financial Modelling	<b>NEW Next Generation Excel Reporting</b> New features added to Excel beginning with the 2016 release offer tremendous opportunities to improve Excel-based reporting, for both financial and operational reporting. Learn about the importance of using Power Query to link data into Excel data models, how to incorporate tools such as Key Performance Indicators, Slicers, and Timelines into your reports, and best practices to quickly and easily format your spreadsheets to give them a polished and professional appearance.	Two segments	Nov-30 & Dec-01	9am-12:30pm Live Webinar
<b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b> Communication & Negotiation Self Management & Wellness Teamwork & Leadership Resilient Leadership Certificate Program  <b>PRACTICE MANAGEMENT</b>  <b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b> Risk Management & Fraud Strategy, Governance, & Human Resource Strategic & Advanced Strategic Management Certificate Programs	<b>Rapid Dashboard Development with Power BI Desktop</b> Power BI Desktop provides access to compelling dashboards that are attractive, interactive, and best of all, incredibly easy to both build and refresh. This hands-on session will explore sourcing data, data visualization and transformation, data model relationships, DAX measures, interactive visuals, and sharing dashboard solutions.	Dec-06	9am-5pm	Live Webinar
<b>TAXATION</b> Commodity Tax Corporate & Personal Tax Not-For-Profit Organizations Trusts & Estates US & International Taxation	<b>VBA Fundamentals - from Zero to Hero</b> This is a two-day, hands-on VBA course that takes participants 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	Mar-08 & Mar-15	9am-5pm Live Webinar
<b>TECHNOLOGY &amp; INNOVATION</b> Business Transformation & Emerging Issues				
<b>Software &amp; Tools</b>				
<b>WEALTH MANAGEMENT</b>				
<b>PD NEXUS DAYS</b>				

ACCOUNTING & ASSURANCE	<b>WEALTH MANAGEMENT</b>			
Audit & Assurance Financial Reporting Management Accounting	<b>A Six Point Plan for Financial Freedom</b> 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.	Dec-02	9am-5pm	Live Webinar
<b>ETHICS</b>				
<b>FINANCE &amp; ECONOMICS</b> Business Valuations Corporate Finance Financial Modelling	<b>Designing Retirement Income</b> In this fast-paced webinar, learn about retirement cash flow considerations on retirement age, CPP, RRIF, income splitting, tax planning, estate factors, insurance, and real estate.	Two segments Nov-30 & Dec-01	9am-12:30pm	Live Webinar
<b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b> Communication & Negotiation Self Management & Wellness Teamwork & Leadership Resilient Leadership Certificate Program	<b>Everything You Need to Know about Government, Bank, and Personal Debt</b> 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.	Nov-16	9am-5pm	Live Webinar
<b>PRACTICE MANAGEMENT</b>				
<b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b> Risk Management & Fraud Strategy, Governance, & Human Resource Strategic & Advanced Strategic Management Certificate Programs	<b>Financial Planning for 30-to-40-Year-Olds</b> 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.	Nov-03	9am-12:30pm	Live Webinar
<b>TAXATION</b> Commodity Tax Corporate & Personal Tax Not-For-Profit Organizations Trusts & Estates US & International Taxation	<b>How to Build an Investment Portfolio and Select Investment Products</b> This is an introductory course for individuals looking to learn the basics in a very thorough way. It is a fast-paced session with informative and direct commentary on today's investment landscape in Canada that will teach you a six-step approach to investment portfolio management.	Two segments Nov-17 & Nov-18	9am-12:30pm	Live Webinar
<b>TECHNOLOGY &amp; INNOVATION</b> Business Transformation & Emerging Issues Software & Tools				
<b>WEALTH MANAGEMENT</b>				
<b>PD NEXUS DAYS</b>				

## SEMINAR SCHEDULE CATEGORY & TITLE

<b>ACCOUNTING &amp; ASSURANCE</b> Audit & Assurance Financial Reporting Management Accounting	<b>How to Prepare a Personal Financial Plan</b> Delve into the world of personal financial planning, and learn how to prepare your own financial plan. Explore different planning areas, how to combine them into one overall plan, manage cash flow, determine priorities, decide among trade-offs, and how to update the plan over time.	Two segments Dec-08 & Dec-09	9am-12:30pm	Live Webinar
	<b>ETHICS</b>	<b>FINANCE &amp; ECONOMICS</b> Business Valuations Corporate Finance Financial Modelling	Nov-04	9am-12:30pm
<b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b> Communication & Negotiation Self Management & Wellness Teamwork & Leadership Resilient Leadership Certificate Program	<b>Money, Love, and the Law</b> In a new social reality our clients are not just divorcing, but re-partnering again – often with the same disastrous financial (and emotional) results! Attend this session to explore legal constructs under the Family Law Act. Explore spousal relationships, co-habitation, and marriage in light of their financial and legal implications.	Nov-23	9am-5pm	Live Webinar
<b>PRACTICE MANAGEMENT</b>	<b>Smoke and Mirrors: Financial Myths that will Ruin Your Retirement Dreams</b> 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.	Nov-02	9am-12:30pm	Live Webinar
<b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b> Risk Management & Fraud Strategy, Governance, & Human Resource Strategic & Advanced Strategic Management Certificate Programs	<b>The ABCs of Personal Insurance</b> Learn the essentials of insurance concepts and products in an educational session with no sales pitches. Find out how to determine what amount of insurance you need, the different types of policies that exist, differences in costs and benefits, and strategies to determine what is suitable for you.	Mar-03	9am-5pm	Live Webinar
<b>TAXATION</b> Commodity Tax Corporate & Personal Tax Not-For-Profit Organizations Trusts & Estates US & International Taxation	<b>The Procrastinator's Guide to Retirement</b> 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.			
<b>TECHNOLOGY &amp; INNOVATION</b> Business Transformation & Emerging Issues Software & Tools				
<b>WEALTH MANAGEMENT</b>				
<b>PD NEXUS DAYS</b>				

## SEMINAR SCHEDULE CATEGORY & TITLE

<p><b>ACCOUNTING &amp; ASSURANCE</b>          Audit &amp; Assurance          Financial Reporting          Management Accounting</p>	<p><b>The Psychology of Investing</b>          Recent research has proven that emotions and behavioural biases, both conscious and unconscious, are more at work than ever imagined. In this engaging and dynamic workshop we will address the empirical findings on investor behaviour and dig deeper into the thought processes at work in our own investing and financial lives.</p>	Dec-09	9am-12:30pm	<b>In-Person, Vancouver</b>
<p><b>ETHICS</b></p> <p><b>FINANCE &amp; ECONOMICS</b>          Business Valuations          Corporate Finance          Financial Modelling</p>	<p><b>The Simplest Personal Finance Strategy Ever</b>          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>	Mar-10	9am-5pm	Live Webinar
<p><b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b>          Communication &amp; Negotiation          Self Management &amp; Wellness          Teamwork &amp; Leadership          Resilient Leadership          Certificate Program</p>				
<p><b>PRACTICE MANAGEMENT</b></p> <p><b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b>          Risk Management &amp; Fraud          Strategy, Governance, &amp; Human Resource          Strategic &amp; Advanced          Strategic Management          Certificate Programs</p>				
<p><b>TAXATION</b>          Commodity Tax          Corporate &amp; Personal Tax          Not-For-Profit Organizations          Trusts &amp; Estates          US &amp; International Taxation</p>				
<p><b>TECHNOLOGY &amp; INNOVATION</b>          Business Transformation &amp; Emerging Issues          Software &amp; Tools</p>				
<p><b>WEALTH MANAGEMENT</b></p>				
<p><b>PD NEXUS DAYS</b></p>				

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

## PD NEXUS DAYS

» **READ MORE** About our Fall/Winter [Nexus Days](#) offerings on pages 78 and 79.

<p><b>Business and Innovation Insights</b></p> <p>Innovation is at the heart of business and organizational success, particularly in our current climate of rapid change and constantly evolving economic and social realities and expectations. This virtual conference-style event is designed to bring you new ideas and perspectives on a wide variety of timely, relevant topics for today's business leaders. Featuring three streams of break-out session choices in addition to the ever-popular Economic Update, you'll find technical topics, sessions on emerging topics relevant to CPAs, and a new equity, diversity, and inclusion stream. Join us for this fast-paced day of new ideas and content to inspire you to create an innovative culture in your organization and successfully navigate change and new expectations.</p>	Dec-07	8:30am-4:30pm	Live Webinar
<p><b>Estate Planning Insights</b></p> <p>This is a joint conference-format PD Day presented by the Society of Trust and Estate Practitioners (STEP) Vancouver branch and CPABC. Designed for estate planning practitioners including professional accountants, lawyers, trust officers, and other financial professionals, this Nexus Day will provide participants with up-to-date, practical, and leading-edge estate planning information, as well as access to highly-regarded speakers covering current and relevant estate planning issues. Don't miss out on this information-packed day and on the chance to meet and network with other estate planning professionals.</p>	Oct-26	8:30am-4:30pm	Live Webinar

## SEMINAR SCHEDULE CATEGORY & TITLE

<p><b>ACCOUNTING &amp; ASSURANCE</b>          Audit &amp; Assurance          Financial Reporting          Management Accounting</p>	<p><b>Local Government Accounting &amp; Auditing Workshop</b>          This is a joint workshop presented by the Government Finance Officers Association of BC (GFOABC) and CPABC. Designed for local government finance professionals, staff who prepare financial statements and auditors of local government entities, this workshop will provide a forum for practitioners and auditors to get up to date on accounting and auditing practices, discuss the issues and exchange ideas.</p>	<p>Nov-18 &amp; Nov-19</p>	<p>TBA</p>	<p>Live Webinar</p>
<p><b>ETHICS</b></p> <p><b>FINANCE &amp; ECONOMICS</b>          Business Valuations          Corporate Finance          Financial Modelling</p>	<p><b>Public Practice Insights</b>          Designed to bring new ideas and tools to help you not just survive but thrive in public practice after a challenging two years, this virtual conference delivers access to a wealth of information from inspiring keynote speakers on Future Proofing Your Trusted Advisor Role and Managing Your Mindset and Emotional Wellbeing. In addition to two streams of breakout session choices on information technology and practice management topics, the Ideas Exchange sessions allow you to interact with your peers to share best practices and learn from and inspire each other. Leave the day with practical takeaways that will elevate you as a practitioner and add value to your firm and your clients.</p>	<p>Nov-09</p>	<p>8:30am-4:30pm</p>	<p>Live Webinar</p>
<p><b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b>          Communication &amp; Negotiation          Self Management &amp; Wellness          Teamwork &amp; Leadership          Resilient Leadership          Certificate Program</p>				
<p><b>PRACTICE MANAGEMENT</b></p> <p><b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b>          Risk Management &amp; Fraud          Strategy, Governance, &amp; Human Resource          Strategic &amp; Advanced          Strategic Management          Certificate Programs</p>				
<p><b>TAXATION</b>          Commodity Tax          Corporate &amp; Personal Tax          Not-For-Profit Organizations          Trusts &amp; Estates          US &amp; International Taxation</p>				
<p><b>TECHNOLOGY &amp; INNOVATION</b>          Business Transformation &amp; Emerging Issues          Software &amp; Tools</p>				
<p><b>WEALTH MANAGEMENT</b></p>				
<p><b>PD NEXUS DAYS</b></p>				

# PD PASSPORTS

Your most economical, cost effective and convenient savings program



## Bulk Savings

The more you learn, the more you save



## Early Bird Discount

Purchase by **Sep 24, 2021**



## Special Discount

Additional 10% discount for this year

PASSPORT DAYS → PASSPORT CREDITS = MORE FLEXIBILITY



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

Recognizing the challenges that many individuals and industries continue to face during this year of rebuilding, PD Passports will continue to be specially discounted by 10%.

## Personal PD Passport

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

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

Early bird price \$1,450 | Regular price \$1,650

With the additional *10% Special Discount* for this year:

**Early bird price \$1,305 | Regular price \$1,485**



### 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 = \$1,305**

**You could save \$870 or 40% 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.

Early bird price \$1,850 | Regular price \$2,050

With the additional *10% Special Discount* for this year:

**Early bird price \$1,665 | Regular price \$1,845**



### 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 = \$1,665**

**You could save \$445 or 21% discount**

## Mini PD Passport <sup>NEW</sup>

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

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

Early bird price \$899 | Regular price \$999

With the additional *10% Special Discount* for this year:

**Early bird price \$809 | Regular price \$899**



### 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 = \$809**

**You could save \$271 or 25% discount**



# PD Nexus Days stay Virtual for Fall/Winter 2021-22

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

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



CPABC  
**Nexus Days**

# PD NEXUS DAYS | FALL/WINTER 2021-22



## Business & Innovation INSIGHTS

December 7, 2021

PD Passport Valid: 12 Credits | \$380

Innovation is at the heart of business and organizational success, particularly in our current climate of rapid change and constantly evolving economic and social realities and expectations. This virtual conference-style event is designed to bring you new ideas and perspectives on a wide variety of timely, relevant topics for today's business leaders. Featuring three streams of break-out session choices in addition to the ever-popular *Economic Update*, you'll find technical topics, sessions on emerging topics relevant to CPAs, and a new equity, diversity, and inclusion stream. Join us for this fast-paced day of new ideas and content to inspire you to create an innovative culture in your organization and successfully navigate change and new expectations.



## Estate Planning INSIGHTS

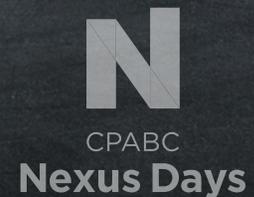
October 26, 2021

PD Passport Valid: 12 Credits | \$380

This is a joint conference-format PD Day presented by the Society of Trust and Estate Practitioners (STEP) Vancouver branch and CPABC. Designed for estate planning practitioners including professional accountants, lawyers, trust officers, and other financial professionals, this Nexus Day will provide participants with up-to-date, practical, and leading-edge estate planning information, as well as access to highly-regarded speakers covering current and relevant estate planning issues. Don't miss out on this information-packed day and on the chance to meet and network with other estate planning professionals.



» PRICING Already reflects discount



# PD NEXUS DAYS | FALL/WINTER 2021-22



## Local Government Accounting & Auditing Workshop

November 18 & 19, 2021

PD Passport Valid: 12 Credits | \$380

This is a joint workshop presented by the Government Finance Officers Association of BC (GFOABC) and CPABC. The objective of this workshop is to provide a forum for practitioners to discuss the accounting, auditing, reporting and financing issues facing local governments. Practices within the Local Government sector are ever-evolving. This workshop will provide an opportunity for practitioners and auditors to get up to date on accounting and auditing practices, discuss the issues and exchange ideas. Attendees will have the opportunity to meet, interact, and exchange ideas with some of those involved in standard setting.



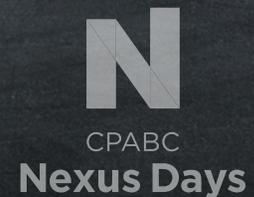
## Public Practice INSIGHTS

November 9, 2021

PD Passport Valid:  
12 Credits | \$380

Designed to bring new ideas and tools to help you not just survive but thrive in public practice after a challenging two years, this virtual conference delivers access to a wealth of information from inspiring keynote speakers on *Future Proofing Your Trusted Advisor Role* and *Managing Your Mindset and Emotional Wellbeing*. In addition to two streams of breakout session choices on information technology and practice management topics, the Ideas Exchange sessions allow you to interact with your peers to share best practices and learn from and inspire each other. Leave the day with practical takeaways that will elevate you as a practitioner and add value to your firm and your clients.

» PRICING Already reflects discount



EXECUTIVE PROGRAMS

# Building Your Expertise

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



## Controller's Program

Created with the aspiring and new Controller in mind.



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

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

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**September 20-21, 27-28**  
(Online)

**December 6-7, 10-11**  
(Online)



**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.

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**November 18-19, 25-26**  
(Online)

### 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.

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**November 15-16, 22-23**  
(Online)



**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.

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**September 9-10, 16-17**  
(Online)

## 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.

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**September 13-15, 20-21**  
(Online)

## 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.

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**2022 dates and venue to be announced**  
in November 2021.

### 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.

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**October 18, 20, 22**  
(Online)

### Smart Leaders 2023

Geared towards leaders in positions of executive responsibility.



**Smart Leaders 2023** 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.

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**November 2-4, 16-18**  
(Online)

## Governing with Intention™

Geared towards directors and professionals who play a role in their organization's governance.



**Governing with Intention™** is a stand-alone program for current or incoming directors and professionals seeking leading governance best practices, to elevate their personal and their board's contribution at the board table, and the skills to navigate the modern boardroom.

**Objective** Over the last decade, there has been an explosion of research and thinking on what constitutes good governance. Yet, directors struggle to convert principles to practice. At the same time, governance continues to evolve, and expectations of directors are becoming more demanding in an increasingly complex world.

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**October 28-29, November 4**  
(Online)

## 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.

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

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Learn more at [pd.bccpa.ca](https://pd.bccpa.ca)

Faculty



**TERESA BUDD, BA, LLB,** collaborates with WATSON as a governance consultant with 20 years' experience in governance and law in both Vancouver and Toronto. She has worked with private and public companies, Crown agencies, municipal corporations, member-based organizations, regulatory bodies, and not-for-profit organizations. Teresa conducts governance reviews, board evaluations, corporate secretarial practice assessments, and supports multiple boards as an outsourced corporate secretary. She is a facilitator in WATSON's Governance Academy delivering governance education programs to both individual directors and boards.

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**TERESA FACILITATES**  
Governing with Intention™



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

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**VIJAY FACILITATES**  
The CFO as Navigator Program



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

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**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.

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**MIA FACILITATES**  
The Controller's Operational Skills Program

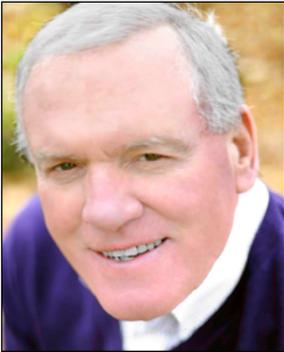


**LESLEY-ANN MARRIOTT, CEC, PCC,** is a certified executive coach who holds the advanced credential of professional certified coach. A former executive in the food industry, Lesley-Ann has over 25 years of leadership and management experience. She has facilitated hundreds of corporate partnerships at 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.

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**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”. Read his full bio on [SmartLeaders.ca](http://SmartLeaders.ca).

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### **JIM FACILITATES**

The CEO Program  
Smart Leaders 2023



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

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### **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 leadership, strategy, business planning, and curriculum development and implementation. She has served on and worked with several boards in Canada and the US.

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### **TAMMY CO-FACILITATES**

The CFO's Leadership Program



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

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

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### **BILL FACILITATES**

Enterprise Risk Management Fundamentals

## CERTIFICATE PROGRAMS

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



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

## Strategic Management



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

### Why take this program?

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

### Who is this program designed for?

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

## Advanced Strategic Management



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

### Why take this program?

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

### Who is this program designed for?

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

## Resilient Leadership



### The five-part Resilient Leadership Certificate modules are:

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

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

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

### 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.

## Faculty

### STRATEGIC MANAGEMENT & ADVANCED STRATEGIC MANAGEMENT



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



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

### RESILIENT LEADERSHIP



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

» **LISTEN** How can you be a resilient leader? Listen to our [podcast](#) with Tammy Robertson.



### 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.



### 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.



### 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.



### 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.



### 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.



### CPABC PD Video On-Demand

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



### Benefits of Personalized Training

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

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

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

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

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

Contact us at [pdreg@bccpa.ca](mailto:pdreg@bccpa.ca) for more information.

# IN-HOUSE PRESENTATION SERVICES

Between 2020 and June 2021, we successfully provided virtual courses for our in-house clients in a safe and convenient environment



96+

Sessions offered



3,000+

participants from 29 organizations (industry & public practice)



4.3/5.0

average course rating



300+

seminar titles to select from

## Testimonials

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

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

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

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

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

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

# CPABC PD Seminars via Zoom Conferencing

For this fall and winter, we will continue our goal of improving our live virtual offerings:

- Less strenuous scheduling – more courses offered as shorter segments over multiple days
- New learning management system – seamless and user-friendly learning environment
- Promote more interaction in the virtual classrooms – more engagement and improved learning
- Help new users navigate live webinar landscape – tips and instructions based on our most frequently encountered issues

## 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.

## Paperless Seminar Materials & Online Services

### Frequently Asked Questions

#### What are the benefits of paperless seminar materials?

We launched our paperless initiative in February 2019 to:

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

#### Are all seminar materials going to be paperless?

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

#### Do all seminar materials have a print option?

No, we no longer offer a print option.

#### How do I access my paperless course materials?

Your paperless course materials will be available on CPABC's new Learning Management System – the MyLearn platform. Login to your CPABC Online Services account, go to the Professional Development tab (green bar at the top) then Your Seminars and

Materials (menu on the right). In the Upcoming Seminars tab, navigate to your course, then click on “Access your course/material on the MyLearn platform”. This will launch your learner page on MyLearn, where you can click on the relevant course, and download PDF materials.

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

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

#### What type of files will I have to download?

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

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

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

#### Can I edit or make notes on the electronic materials?

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

### Discounted Pricing for the Fall/Winter Program

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

#### 20% OFF Individual PD seminars

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

#### 10% OFF PD passports

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

#### » WATCH

Visit our website for tips & videos

## 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](mailto:pdreg@bccpa.ca). The confirmation notice is provided as a courtesy - all assessments apply whether or not a registrant receives a confirmation notice.

### Seminar Venues & Dates

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

### Registration Cancellations, Transfers & Refunds

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

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

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

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

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

### Seminar Cancellations by CPABC

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

### Seminar Leader Substitution

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

### Meals for In-Person Seminars

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

### E-Learning and Online On-Demand Seminars

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

### Flexi PD Passport Registrations

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

### Audio/Video Recording & Photography

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

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

Please note that by registering for CPABC PD seminars, webinars, programs, and on-demand learning, the registrant agrees to: The Terms & Conditions specified above.

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

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

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



**CPA**

CHARTERED  
PROFESSIONAL  
ACCOUNTANTS  
BRITISH COLUMBIA

800-555 West Hastings St  
Vancouver BC V6B 4N6

T (604) 872-7222

F (604) 681-1523

TF 1(800) 663-2677

[www.bccpa.ca](http://www.bccpa.ca)

 CPABC

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 CPABC