CHARTERED
PROFESSIONAL
ACCOUNTANTS
BRITISH COLUMBIA

Professional Development

Take flight

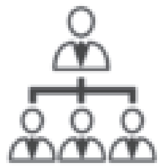
2020

SPRING | SUMMER

Welcome to Spring-Summer 2020!

Spring and summer are seasons synonymous with growth and upgrades - so why not think about broadening your own horizons? Let CPABC PD help you grow professionally and personally by exposing you to new knowledge, ideas and methods that can support you on your path. Here's what we have available between May and August:

150+
in-person titles
including 18 new titles



230
in-person offerings
across 11 cities

150+
on-line on-demand titles
+ webinars through partnerships
with other online providers

PD Nexus Days

We have three great PD Nexus Days in our summer lineup – *Information Technology Insights 2020* (June 18-19), *Business & Leadership Insights Vancouver* (July 9), and *Business Insight Victoria* (July 14)

Digital Transformation & Data Security

This emerging topic – using new and advancing digital technologies to modify business processes - is an important area for our members. Plan on attending the new seminar *Digital Transformation – To Do or Not To Do* and learn how digital transformation can play a role in your organization's strategy. There is also an urgent and increasing need to understand the threats to data security as our dependence on digital technology escalates. The upcoming seminars *2020 Technology Update*, *Securing Your Data – Practical Tools for Protecting Information*, *Ethics & Technology,* and *PD Nexus: Information Technology Insights 2020* will shed light on some issues related to cyber security.

We appreciate your feedback

Last year, we introduced a few initiatives to our program based partially on attendee-feedback. With enhancements in CPABC's Online Services, we started providing electronic course materials in May 2019, and by last fall, CPABC PD seminars converted to primarily paperless. While we will continue to monitor your feedback, we are encouraged by the many positive comments ranging from "easier to maintain and retrieve electronic copies" to "good initiative towards environment" and "it worked extremely well and was easy to access". We are also glad that the introduction of breakfast pastries in the morning has been creating a more positive start to your learning day, as indicated through many comments of appreciation.

Upcoming changes to the PD Passport

The CPABC PD Passports – your most cost effective savings program – will be undergoing a change beginning this September. The passport measurement unit will shift from "days" to "credits" to help better align your passport units to the "learning value" of the ever growing pool of in-person and online seminar options. Our goal is to offer you more flexibility in how you choose to use your passport credits. Stay tuned for more details, and for those who currently have passport days remaining in their 2019-2020 PD Passports, remember to use them before August 31, 2020! Passports for 2020-2021 will go on sale in late June.

Your CPABC PD Team

CONTENTS

General Information

Seminars

Unsubscribe from printed PD catalogue

Our two seasonal PD catalogues (fall/winter and spring/summer) are also available in electronic format on our website. If you do not want to receive printed copies of the catalogues, simply email pdreg@bccpa.ca, and provide your full name and membership number to be removed from the mailing list.

Cover photo: Supercaliphotolistic/istock/GettyImages

PD Passports

PD Passports are a great way to save on your professional development training costs! We still have a wide selection of seminars scheduled between May and August 2020, so consider purchasing a PD Passport to enjoy substantial savings. See page 6 for details on the PD Passports.

Seminar Levels & Naming Conventions

See page 3 for a definition of seminar levels, and explanations of our naming conventions to assist you in selecting the appropriate seminar for your needs.

Paperless PD

See page 2 for important information on paperless seminar materials. While some seminars will have a hard copy print option, registrants will have to opt in and pay an additional nominal fee for the printed copy.

New Seminars for Spring-Summer

We're constantly trying to help members keep relevant and timely – here are some new titles coming up

- A Threats and Safeguards Approach to Ethical Decision Making
- Assessing and Responding to Workgroup Conflict
- Canadian Capital Additions and CCA – The Latest
- Compilation Engagements – Overview of the New Standards (CSRS 4200)
- Data Analytics and the Future of Finance
- Digital Transformation – To Do or Not To Do
- Ethics and Technology
- Excel Charting and Visualizations
- Giving and Receiving Feedback in the Workgroup
- Introduction to Excel Macros
- Learning to Lead – The Essentials
- Managing Across Generations
- Power Pivot – Business Intelligence at the Heart of Excel
- Power Query – Automated, Consistent Data, Time after Time
- Public Sector & Not-for-Profit Sector Performance Management
- Strategic HR Planning
- Testing and Auditing Excel Workbooks
- Visual Analytics and Dashboards

Introducing New Executive Program

See page 111 for the latest addition to our suite of Executive Programs – Governing with Intention™ - designed to provide leading governance best practices, and help professionals navigate the modern boardroom.

All seminars are listed on our website at pd.bccpa.ca
For further information, please direct your enquiries to pdreg@bccpa.ca, or call 604 872.7222 and ask for the PD Department.

Friendly reminder

> 2 Days Before: Download material, open and review ability to make notes in PDF
>
> 1 Day Before: Fully charge your device
>
> Day of seminar: Materials are ready to go – happy learning!

Paperless Seminar Materials & Online Services

Paperless seminars are now a reality, with the majority of CPABC PD seminars now providing electronic course materials. Some seminars will continue to have a print copy option available subject to a nominal printing fee. Registrants interested in paper, can order a printed copy at the time you register for a seminar.

With the move to paperless, we strongly encourage attendees to bring a fully charged electronic device (laptop, tablet, iPad) pre-loaded with the paperless course material, *especially when attending seminars of a more technical nature*. Without access to the materials in class, you will experience a decrease in the effectiveness of your learning.

Frequently Asked Questions

Why go paperless?

In response to the growing popularity of the digital storage of materials, and in conjunction with an enhanced Online Service Portal for CPABC PD, we expanded our paperless initiative 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
- fall in line with CPA PD programs across the country who have adopted paperless materials for their membership

Does the seminar registration process change?

To order a printed copy of the seminar materials, you will need to select that option (if available) when you register. Beginning with our Fall/Winter program in September 2019, the opt-in for printed seminar materials will be subject to a nominal printing fee.

Are all seminar materials going to be paperless?

A small number of seminars, including Executive Programs, may still require printed materials. In these cases, we will continue offering the course materials in printed form at no additional cost. Electronic copies of such seminar materials may not be available.

Do all seminar materials have a print option?

When the paper count is low, seminars will be paperless only with no print option, but you are free to print a copy yourself.

How do I access my paperless course materials?

Your paperless course materials will be available in your **Online Services** account. Log in to your account, go to the **Professional Development** tab (green bar at the top) then **Registration History and Material** (menu on the right). The material will be available under **Upcoming Seminars**.

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

You will now have access to the course materials, through download, **2 business days** prior to the seminar start date and for up to **1 month** post seminar date.

What type of files will I have to download? What is a zip file?

Your paperless course materials will be in a zipped file. A zip file is a file format that compresses multiple files into a folder and is commonly used to share files over the Internet – although course materials will most often be in PDF format, some may contain Word and/or Excel files as well. After you have downloaded the zip file, you will have to 'unzip' the files and folders that are compressed inside. Locate where the zipped folder was saved on your computer after downloading, then do one of the following: Open the zipped folder by double-clicking it, then drag the file or folder from the zipped folder to a new location; Right-click the zipped folder, select Extract All, and then follow the instructions.

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

We do not recommend using your mobile phone. While tablets/iPads are recommended, you may first need to install an app (there are various free apps) that will allow you to unzip your file directly on your tablet/iPad. Alternatively, you can download and unzip the file first on your desktop/laptop and then copy/send the file over to the device you plan to bring with you to the class.

What should I bring to the course?

Prior to attending the seminar, ensure you have a **fully charged** electronic device (laptop/tablet/iPad) **preloaded** with the course materials – power outlets may be limited at the course venue, and while WiFi is available, we cannot guarantee the quality of internet access nor provide technical support. You may also bring your own printed copy if that is your preference.

Can I edit or make notes on the electronic materials?

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

Seminar Levels

To assist members in deciding if a seminar is right for them, a course "level" is included in the course description. A "level" is based on the information the seminar will disseminate and an assumed pre-requisite knowledge of the potential participant.

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

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

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

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

Naming Conventions

In addition to the identified seminar levels above, the following terminology is sometimes used within some of our seminar titles to further define the content of the seminar.

Update – reviews all relevant changes in a subject area during the past 12-18 months. A solid understanding of the subject area prior to the changes is required.

Review – provides a thorough examination of all the significant standards or concepts in a subject area at an intermediate level. For standards based courses, a majority of, and all key, standards are examined. Basic knowledge of the subject area is required.

Specific Topics – provides a thorough examination of specific standards or concepts in a subject area. Topic coverage is listed in the course description. Fundamental knowledge of the subject area is required.

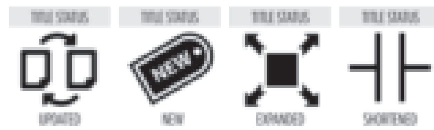
Fundamentals – examines the key foundational topics of a subject area. Common knowledge of the subject area is required.

Essentials – provides a general review of the key topics or standards to provide the user with an awareness of a subject area Common knowledge of the subject area required.

Advanced – provides a deeper examination of the significant standards or concepts in a subject area than a fundamental, or essentials course. Fundamental knowledge of the subject area is required.

Seminar Icons - Legend and Definition

Title Status – will indicate if a course title is new, updated, expanded, or carried forward (no major content change).



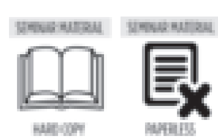
Notable Format – will indicate if the course will be taught in a format other than standard classroom, lecture.

Required – will indicate what registrants are required to bring to the class.

Optional – will indicate what registrants are encouraged, but not required, to bring to the class.

Available Option – will indicate if the course will also be available in a different option or format.

Seminar Material – will indicate if the course material is paperless or in hard copy



CPABC
PD Passports

Personal PD Passport & Flexi PD Passport

The Personal and Flexi PD Passports are savings programs for members and other professionals taking multiple professional development seminars throughout the year. For the price of a PD Passport, you are entitled to register for 6 days of PD Passport Valid seminars held between September 1, 2019 and August 31, 2020 at no extra cost. You can mix and match executive briefs (3 executive briefs are equal to 1 day), half-day, one-day, and two-day seminars to equal 6 days of PD training – potentially saving you 30% or more off seminar prices.

The 2019-2020 PD Passports are valid on seminars held between September 1, 2019 through to August 31, 2020 only.

Personal PD Passport - $1,650+GST

For individual, designated CPABC members. This type of PD Passport is non-transferable – only the Passport holder can use it. Substitution of attendees at seminars will not be allowed.

Flexi PD Passport - $2,050+GST

For company-wide training or simply group savings, anyone can buy it, and anyone can use it. Share the days with employees, colleagues, or clients.

Other benefits with the PD Passport include

- register for PD seminars at any time after your passport purchase
- economical way to meet your CPD reporting requirements – one PD Passport straddles two CPD reporting years
- budget educational activities for the coming year conveniently
- explore new areas of practice at a fraction of the price
- eligible for our web-based seminars as well (see next column)

NOTE: CPABC PD seminars that are not PD Passport Valid will be clearly marked "PD Passport invalid".

Personal & Flexi PD Passports can be used for PD AudioWeb titles and other Online Seminars

We know that some of our members face challenges in attending traditional classroom seminars. We offer these members a way to continue their professional education in a cost effective manner by offering a selection of web-based seminars. These "to go" sessions allow you to learn what you want, where you want, and at the pace and in the amount of detail you choose.

Our web-based seminars are eligible for Verifiable CPD Hours – in order to claim those hours as verifiable, you will be required to successfully complete a short quiz or answer polling questions. See pages 114-124 for a selection of titles.

To order your passport

You can go to our website at pd.bccpa.ca to make your online purchase or email pdreg@bccpa.ca for more information.

Save on your

Professional Development training

Vancouver

May-20	Becoming an Ethical Leader	8:30am-12:30pm	Sutton Place	66
May-20	Employment Law & HR Practices	9am-5pm	Sutton Place	85
May-20	Shades of Grey: Ethics in the Workplace	1pm-5pm	Sutton Place	68
May-21	A Threats and Safeguards Approach to Ethical Decision Making	8:30am-12:30pm	UBC Robson	65
May-26	ASPE – Real Estate Industry	9am-5pm	Sutton Place	26
May-27	Business Valuations – Fundamentals	9am-5pm	Sutton Place	36
Jun-05	Review Engagements – Specific Topics	9am-5pm	Sutton Place	24
Jun-08	Brain Focus: The Power of Full Engagement	9am-12:30pm	Sutton Place	71
Jun-08	Fraud Happens – What to do When You Suspect Fraud	9am-5pm	Sutton Place	24
Jun-09	CRA Business Audits and Settlement Strategies	8am-10am	Sutton Place	95
Jun-09	Communicating Effectively Under Pressure	9am-5pm	Sutton Place	61
Jun-10	An End to Manual Effort in Excel: The Power Query Effect	9am-5pm	Sutton Place	43
Jun-10	Corporate Finance	9am-5pm	Sutton Place	37
Jun-10	Building a Financial Model of a Company	9am-5pm	Sutton Place	44
Jun-10 & 11	Tax for Controllers	9am-5pm	Sutton Place	99
Jun-11	ASPE - Disclosure and Presentation	9am-5pm	Sutton Place	26
Jun-11	Financial Modeling – DCF Valuation Analysis	9am-5pm	Hyatt Regency	50
Jun-11	Rapid Dashboard Development with Power BI Desktop	9am-5pm	Hyatt Regency	55
Jun-12	Understanding and Embracing Ethics in the Workplace	8:30am-12:30pm	UBC Robson	69
Jun-12	Data Analysis & Communication with Excel	9am-5pm	Sutton Place	46
Jun-12	Coaching for Executive Excellence	9am-5pm	Sutton Place	77
Jun-15	Balancing Your Wheels	9am-5pm	Sutton Place	70
Jun-15	Interpreting Financial Statements	9am-5pm	Sutton Place	32
Jun-15 & 16	ASPE – Review of the Standards	9am-5pm	Sutton Place	27
Jun-15	Leadership and Coaching	9am-5pm	Sutton Place	80
Jun-16	Financial Management in the Construction Industry	9am-5pm	Sutton Place	31
Jun-16	Modeling Project Finance: Real Estate	9am-5pm	Sutton Place	54
Jun-16	Employing Contractors and Contracting Employees: Sorting Out Tax and Legal Issues	8am-10am	Sutton Place	96
Jun-17	Life-Interest Trusts as Will Substitutes	9am-12:30pm	Van Convention Centre West	98
Jun-17	Essential Topics for Controllers	9am-5pm	Van Convention Centre West	31
Jun-17	A Coach Approach to Problem Solving	9am-5pm	Van Convention Centre West	64
Jun-18	Corporate Tax - Investment Holding Companies	9am-12:30pm	Sutton Place	93
Jun-18	Understanding the Financial Risk of Employee Benefits	9am-12:30pm	Sutton Place	69
Jun-18	Smoke and Mirrors: Financial Myths that will Ruin Your Retirement Dreams	9am-5pm	Sutton Place	102
Jun-18 & 19	PD Nexus: Information Technology Insights 2020	8:30am-4:30pm	Van Convention Centre West	107
Jun-19	Compilation Engagements – Overview of the New Standards (CSRS 4200)	9am-12:30pm	Sutton Place	23
Jun-19	Compiling Financial Statements	1:30pm-5pm	Sutton Place	28
Jun-19	Enough Bull: How to Retire Well Without the Stock Market	9am-5pm	Sutton Place	101
Jun-19	ASPE – Related Party Transactions	9am-5pm	Sutton Place	27
Jun-19	Creative Use of Partnerships in Tax Planning	9am-12:30pm	Sutton Place	95
Jun-22	Business Valuations – Advanced	9am-5pm	Sutton Place	35
Jun-22	Clear Thinking/Clear Speaking	9am-5pm	Sutton Place	60
Jun-22 & 23	Audit Engagements – Review of the Standards	9am-5pm	Sutton Place	23
Jun-23	Advanced Strategic Management Certificate: Links	9am-5pm	Fairmont Waterfront	90
Jun-23	Due Diligence for Acquisitions	9am-5pm	Fairmont Waterfront	38
Jun-23	Power Query – Automated, Consistent Data, Time after Time	9am-5pm	Sutton Place	55

Jun-23	Ethical Tax	8am-10am	Sutton Place	96
Jun-24	Strategic Management Certificate: Risk Management & Governance	9am-5pm	Sutton Place	88
Jun-24	NFPO – Review of the Standards	9am-5pm	Sutton Place	29
Jun-25	Giving and Receiving Feedback in the Workgroup	9am-12:30pm	Sutton Place	79
Jun-25 & 26	IFRS – Review of the Standards	9am-5pm	Sutton Place	28
Jun-25	Money, Love and the Law	9am-12:30pm	Sutton Place	102
Jun-26	Essence of Leadership	9am-5pm	Sutton Place	79
Jun-29	Strategic Management Certificate: Change Management	9am-5pm	Sutton Place	89
Jun-30	Strategic Management Certificate: Strategic Planning	9am-5pm	Sutton Place	88
Jul-06	Data Analytics and the Future of Finance	9am-5pm	Sutton Place	46
Jul-06	Excel: The Next Level of Skills	9am-5pm	Sutton Place	48
Jul-06	Top PDF Features You Should Know	9am-12:30pm	Sutton Place	57
Jul-06	2020 Technology Update	1:30pm-5pm	Sutton Place	41
Jul-06 & 07	Personal Tax – Review of Tax Planning	9am-5pm	Sutton Place	98
Jul-07	Ethics and Technology	8:30am-12:30pm	UBC Robson	67
Jul-07	Professional Presence	9am-5pm	Sutton Place	73
Jul-07 & 08	Visual Analytics and Dashboards (i2VSA)	9am-5pm	Sutton Place	58
Jul-08	Canadian Capital Additions and CCA: The Latest	8am-10am	Sutton Place	92
Jul-08	Strategic HR Planning	9am-5pm	Sutton Place	87
Jul-08	Intro-Mediate Excel Techniques	9am-5pm	Sutton Place	53
Jul-09	PD Nexus: Business & Leadership Insights	8:30am-4:30pm	Van Convention Centre West	106
Jul-09	Power Pivot – Business Intelligence at the Heart of Excel	9am-5pm	Sutton Place	54
Jul-10	ASPE – Comparison to IFRS	9am-5pm	Sutton Place	25
Jul-10	Tools for Communicating with Difficult People	9am-5pm	Sutton Place	62
Jul-13	ASPE – Construction Industry	9am-12:30pm	Sutton Place	25
Jul-13	Assessing and Responding to Workgroup Conflict	9am-12:30pm	Sutton Place	76
Jul-13	The Psychology of Investing	9am-12:30pm	UBC Robson	103
Jul-13 & 14	VBA Fundamentals: From Zero to Hero	9am-5pm	Sutton Place	57
Jul-14	Budgeting and Forecasting Tools and Techniques	9am-5pm	Hyatt Regency	44
Jul-14	Advanced Strategic Management Certificate: Maps	9am-5pm	Hyatt Regency	90
Jul-14	Corporate Tax – Section 55: How Safe Are Your Dividends?	9am-12:30pm	Sutton Place	94
Jul-14	Corporate Tax – RDTOH, CDA & Other Tax Accounts	1:30pm-5pm	Sutton Place	93
Jul-15	RIP - Estate Planning	9am-5pm	Hyatt Regency	99
Jul-15	Starting a Successful CPA Practice	9am-5pm	Sutton Place	83
Jul-15	Becoming a Skilled Negotiator	9am-5pm	Sutton Place	60
Jul-15 & 16	Excel Boot Camp	9am-5pm	Sutton Place	48
Jul-15	Strategic Management Certificate: Strategic Planning	9am-5pm	Hyatt Regency	88
Jul-15	Foundations of Blockchain	9am-12:30pm	Sutton Place	51
Jul-15	Treasury & Finance for Accountants	9am-5pm	Hyatt Regency	39
Jul-15	Blockchain Essentials for CPAs	1:30pm-5pm	Sutton Place	43
Jul-16	Business Ethics: It Starts With You	8:30am-12:30pm	Sutton Place	66
Jul-16	Business Valuations – Purchase Price Allocation	9am-5pm	Hyatt Regency	36
Jul-16	Managing My People	9am-5pm	Hyatt Regency	81
Jul-16	Advanced Financial Statement Analysis	9am-5pm	Hyatt Regency	29
Jul-16	Managing Across Generations	1:30pm-5pm	Sutton Place	81

Jul-17	Advanced Excel	9am-5pm	Hyatt Regency	42
Jul-17	Employment Standards Overview	9am-12:30pm	Sutton Place	85
Jul-17	US Corporate Tax - Fundamentals	9am-5pm	Hyatt Regency	100
Jul-17	Income Tax – Principal Residences	1:30pm-5pm	Sutton Place	97
Jul-20	Effective & Essential Management Skills	9am-5pm	Hyatt Regency	78
Jul-20	Financing Strategies	9am-5pm	Hyatt Regency	38
Jul-20	Wiring Your Brain for High Impact Leadership	9am-5pm	Sutton Place	82
Jul-21	2020 Technology for CPAs - Don't Get Left Behind	9am-5pm	Sutton Place	40
Jul-21	Principles of Negotiation	9am-12:30pm	Sutton Place	62
Jul-21	Top Talks: How to Talk to Decision-Makers	9am-12:30pm	Sutton Place	63
Jul-22	Corporate Tax - Investment Holding Companies	9am-12:30pm	Sutton Place	93
Jul-22	The Simplest Personal Finance Strategy Ever	9am-5pm	Sutton Place	104
Jul-22	Testing and Auditing Excel Workbooks	9am-12:30pm	Sutton Place	56
Jul-22	Business Ethics: It Starts With You	8:30am-12:30pm	Sutton Place	66
Jul-22	Business Ethics: It Starts With You	1pm-5pm	Sutton Place	66
Jul-22	Emerging Technologies for Accountants, Including Blockchain and Cryptocurrencies	1:30pm-5pm	Sutton Place	47
Jul-23	Income Tax – Real Estate	9am-5pm	Hyatt Regency	97
Jul-23	Excel Charting and Visualizations	9am-12:30pm	Sutton Place	49
Jul-23	Internal Control Refresher for Financial Managers	9am-5pm	Sutton Place	32
Jul-23	We Have to Talk - Having the Difficult Conversations	9am-5pm	Sutton Place	75
Jul-23	Advanced Tax Planning for Business Succession	9am-5pm	Hyatt Regency	91
Jul-23	Practical Tips for Not-for-Profit Financial Leaders	9am-5pm	Sutton Place	34
Jul-23	Securing Your Data - Practical Tools for Protecting Information	1:30pm-5pm	Sutton Place	56
Jul-24	Ethical Leadership in an Age of AI	8:30am-12:30pm	UBC Robson	67
Jul-24	Cash and Treasury Management	9am-5pm	Sutton Place	37
Jul-24	Practical Tips for Controllers & CFOs	9am-5pm	Sutton Place	33
Jul-24	You're Speaking - But Are You Connecting?	9am-12:30pm	Sutton Place	63
Jul-24	Ethics at our Core	1pm-5pm	UBC Robson	68
Jul-27 & 28	Corporate Tax – Review of Tax Planning	9am-5pm	Sutton Place	94
Jul-27	Advanced Strategic Management Certificate: Links	9am-5pm	Hyatt Regency	90
Jul-27	Triple Your Reading Speed	9am-5pm	Hyatt Regency	75
Jul-28	Strategic Management Certificate: Team Development	9am-5pm	Sutton Place	89
Jul-28	Empowering and Engaging Others	9am-5pm	Sutton Place	78
Aug-05	Google is Not Enough: The Best Search Tools You Aren't Using (But Should!)	9am-5pm	Sutton Place	51
Aug-05	Influence and Assertiveness	9am-5pm	Sutton Place	72
Aug-06	Audit Engagements – Application of the Standards Using PEG	9am-5pm	Sutton Place	22
Aug-06	What Do People Want? Motivating Yourself & Others	9am-5pm	Sutton Place	82
Aug-07	Achieving Results Through Collaborative Projects	9am-5pm	UBC Robson	64
Aug-07	Leading Strategy into Action	9am-5pm	UBC Robson	86
Aug-10	Achieving Balance in Work and Life	9am-5pm	Sutton Place	69
Aug-10	Controllership – Operational Management	9am-5pm	Sutton Place	30
Aug-11	Project Management: Tips & Traps	9am-5pm	Sutton Place	65
Aug-11	Shortcut to Success: The 14 Best Tools for Personal and Professional Growth	9am-5pm	Sutton Place	74
Aug-11	Business Intelligence, Featuring Microsoft's Power BI Tools	9am-5pm	Sutton Place	45
Aug-11	Controllership – Strategic Leadership	9am-5pm	Sutton Place	30

Aug-12	Public Sector and Not-for-Profit Sector Performance Management	9am-5pm	Sutton Place	86
Aug-12	Advanced Excel Reporting - Best Practices, Tools and Techniques	9am-12:30pm	Sutton Place	42
Aug-12	Introduction to Excel Macros	1:30pm-5pm	Sutton Place	53
Aug-13	Becoming an Ethical Leader	8:30am-12:30pm	Sutton Place	66
Aug-13	Advanced Excel Data Magic - Managing, Analyzing, and Reporting	9am-5pm	Sutton Place	41
Aug-13	How to Present Financial Data Effectively Using PowerPoint	9am-5pm	Hyatt Regency	52
Aug-13	Learning to Lead	9am-5pm	Sutton Place	80
Aug-13	Corporate Restructuring – Fundamentals	9am-5pm	Hyatt Regency	92
Aug-13	Shades of Grey: Ethics in the Workplace	1pm-5pm	Sutton Place	68
Aug-14	Unveiling the Retirement Myth	9am-5pm	Sutton Place	104
Aug-14	Hands-on Techniques to Create Effective Financial Visuals in Excel and PowerPoint	9am-5pm	Sutton Place	52
Aug-14	Digital Transformation - To do or Not to Do	9am-5pm	Sutton Place	84
Aug-14	Dispelling the Myth of "Effective Meetings"	9am-12:30pm	Sutton Place	77
Aug-18	Conflict: Changing Viewpoints & Influencing Behaviors	9am-5pm	Sutton Place	61
Aug-18	Excel Financial Models and Analysis	9am-5pm	Hyatt Regency	49
Aug-18	Advanced Strategic Management Certificate: Maps	9am-5pm	Hyatt Regency	90
Aug-19	A Threats and Safeguards Approach to Ethical Decision Making	8:30am-12:30pm	UBC Robson	65
Aug-19	Building High Performance Teams	9am-5pm	Sutton Place	76
Aug-19	Excel: Specific Skills for Budgeting, Planning & Forecasting	9am-5pm	Hyatt Regency	47
Aug-19	Strategic Management Certificate: Team Development	9am-5pm	Hyatt Regency	89
Aug-20	Becoming...what you really want to be	9am-5pm	Sutton Place	70
Aug-21	Time Management: The Essentials of Productivity Skills	9am-5pm	Sutton Place	74

Abbotsford

Jun-04	Coach Yourself First	9am-5pm	Quality Hotel	71
Jun-09	Creating Vibrant Dashboards	9am-5pm	Quality Hotel	45
Jun-25	A Threats and Safeguards Approach to Ethical Decision Making	8:30am-12:30pm	Quality Hotel	65
Jul-29	Practical Tips for Controllers & CFOs	9am-5pm	Quality Hotel	33

Burnaby

May-27	Business Ethics: It Starts With You	8:30am-12:30pm	Hilton Metrotown	66
May-27	Business Ethics: It Starts With You	1pm-5pm	Hilton Metrotown	66
Jun-23	Employment Law & HR Practices	9am-5pm	Hilton Metrotown	85
Jul-20	A Threats and Safeguards Approach to Ethical Decision Making	8:30am-12:30pm	Hilton Metrotown	65

Coquitlam

Jun-09	Business Ethics: It Starts With You	8:30am-12:30pm	Executive Plaza	66
Jun-09	Business Ethics: It Starts With You	1pm-5pm	Executive Plaza	66
Jun-10	A Coach Approach to Problem Solving	9am-5pm	Executive Plaza	64
Jun-18	Tools for Communicating with Difficult People	9am-5pm	Executive Plaza	62
Jul-06	An End to Manual Effort in Excel: The Power Query Effect	9am-5pm	Executive Plaza	43

Kamloops

Jun-30	Becoming an Ethical Leader	8:30am-12:30pm	Coast Kamloops	66
Jun-30	Shades of Grey: Ethics in the Workplace	1pm-5pm	Coast Kamloops	68

Kelowna

Jun-11	A Threats and Safeguards Approach to Ethical Decision Making	8:30am-12:30pm	Ramada Hotel	65
Jun-16	Excel Financial Models and Analysis	9am-5pm	Ramada Hotel	49
Jun-18	Wiring Your Brain for High Impact Leadership	9am-5pm	Ramada Hotel	82
Jul-09	Strategic Management Certificate: Strategic Planning	9am-5pm	Coast Capri	88
Jul-10	Strategic Management Certificate: Risk Management & Governance	9am-5pm	Coast Capri	88
Jul-16	Time Management: The Essentials of Productivity Skills	9am-5pm	Coast Capri	74

Nanaimo

Jun-03	Employment Law & HR Practices	9am-5pm	Vancouver Island Conference Ctr	85
Jul-31	Shades of Grey: Ethics in the Workplace	8:30am-12:30pm	Vancouver Island Conference Ctr	68

Prince George

Jun-11	Effective & Essential Management Skills	9am-5pm	Ramada Plaza	78
Jun-12	Excel: The Next Level of Skills	9am-5pm	Ramada Plaza	48
Jun-23	Controllership – Strategic Leadership	9am-5pm	Ramada Plaza	30

Richmond

May-20	A Threats and Safeguards Approach to Ethical Decision Making	8:30am-12:30pm	Executive Airport Plaza	65
Jun-17	Critical Thinking and Self Reflection	9am-5pm	Executive Airport Plaza	72
Jul-08	Excel: Specific Skills for Budgeting, Planning & Forecasting	9am-5pm	Executive Airport Plaza	47
Jul-15	Google is Not Enough: The Best Search Tools You Aren't Using (But Should!)	9am-5pm	Executive Airport Plaza	51
Jul-24	The Simplest Personal Finance Strategy Ever	9am-5pm	Executive Airport Plaza	104
Aug-14	Becoming an Ethical Leader	8:30am-12:30pm	Executive Airport Plaza	66
Aug-14	Shades of Grey: Ethics in the Workplace	1pm-5pm	Executive Airport Plaza	68

Surrey

May-26	Business Ethics: It Starts With You	8:30am-12:30pm	Sheraton Guildford	66
May-26	Business Ethics: It Starts With You	1pm-5pm	Sheraton Guildford	66
Jun-10	Becoming a Skilled Negotiator	9am-5pm	Sheraton Guildford	60
Jun-10	Leading Strategy into Action	9am-5pm	Sheraton Guildford	86
Jun-11	Managing My People	9am-5pm	Sheraton Guildford	81
Jun-12	Compilation Engagements – Overview of the New Standards (CSRS 4200)	9am-12:30pm	Sheraton Guildford	23
Jun-17	Smoke and Mirrors: Financial Myths that will Ruin Your Retirement Dreams	9am-5pm	Sheraton Guildford	102
Jun-24	Ethical Leadership in an Age of AI	8:30am-12:30pm	Sheraton Guildford	67
Jun-26	Controllership – Operational Management	9am-5pm	Sheraton Guildford	30
Jul-07	Rapid Dashboard Development with Power BI Desktop	9am-5pm	Sheraton Guildford	55
Jul-08	Personal Effectiveness: Self Awareness and Balanced Thinking	9am-5pm	Sheraton Guildford	73

Surrey continued

Jul-10	Excel Financial Models and Analysis	9am-5pm	Sheraton Guildford	49
Jul-13	Excel Tips, Tricks and Techniques for Accountants	9am-5pm	Sheraton Guildford	50
Jul-17	Powerful Financial Analysis	9am-5pm	Sheraton Guildford	33
Jul-21	Strategic Management Certificate: Team Development	9am-5pm	Sheraton Guildford	89
Jul-22	Strategic Management Certificate: Change Management	9am-5pm	Sheraton Guildford	89
Jul-24	Ethics and Technology	8:30am-12:30pm	Sheraton Guildford	67
Jul-24	2020 Technology Update	1:30pm-5pm	Sheraton Guildford	41
Jul-29	Time Management: The Essentials of Productivity Skills	9am-5pm	TBA	74
Aug-10	Effective & Essential Management Skills	9am-5pm	Sheraton Guildford	78
Aug-13	Unveiling the Retirement Myth	9am-5pm	Sheraton Guildford	104

Victoria

May-14	Ethical Leadership in an Age of AI	8:30am-12:30pm	Marriott Inner Harbour	67
Jul-06	ASPE – Disclosure and Presentation	9am-5pm	Delta Ocean Pointe	26
Jul-07	Becoming an Ethical Leader	8:30am-12:30pm	Marriott Inner Harbour	66
Jul-07	Compilation Engagements – Overview of the New Standards (CSRS 4200)	9am-12:30pm	Delta Ocean Pointe	23
Jul-07	Public Sector and Not-for-Profit Sector Performance Management	9am-5pm	Marriott Inner Harbour	86
Jul-07	Shades of Grey: Ethics in the Workplace	1pm-5pm	Marriott Inner Harbour	68
Jul-08	Ethics and Technology	8:30am-12:30pm	Marriott Inner Harbour	68
Jul-09	2020 Technology for CPAs - Don't Get Left Behind	9am-5pm	Marriott Inner Harbour	40
Jul-10	Excel Tips, Tricks and Techniques for Accountants	9am-5pm	Marriott Inner Harbour	50
Jul-13	Treasury & Finance for Accountants	9am-5pm	Marriott Inner Harbour	39
Jul-14	PD Nexus: Business Insights Victoria	8:30am-4:30pm	Victoria Conference Centre	106
Jul-14	Business Ethics: It Starts With You	8:30am-12:30pm	Victoria Conference Centre	66
Jul-15	Leading Strategy into Action	9am-5pm	Marriott Inner Harbour	86
Jul-21	Practical Tips for Not-for-Profit Financial Leaders	9am-5pm	Marriott Inner Harbour	34
Jul-23	The Procrastinator's Guide to Retirement	9am-5pm	Marriott Inner Harbour	103

How to register

- On our secure website at pd.bccpa.ca
- By phone 604 872.7222 (ask for the PD Department)
- By email to pdreg@bccpa.ca (only for registrations with no credit card payments – please do not include credit card information by email)
- By mail to the CPABC 800-555 West Hastings Street, Vancouver, BC V6B 4N6 (Registration form on page 132)

Our Spring/Summer 2020 program includes seminars until late August. The Fall/Winter 2020 Catalogue will be available in August and will include seminars from September 2020 to March 2021.

Accounting & Assurance

Audit & Assurance

Audit Engagements – Application of the Standards Using PEG	Aug-06	9am-5pm	Vancouver	Sutton Place	22
Audit Engagements – Review of the Standards	Jun-22 & 23	9am-5pm	Vancouver	Sutton Place	23
Compilation Engagements – Overview of New Standard (CSRS 4200)	Jun-12	9am-12:30pm	Surrey	Sheraton Guildford	23
	Jun-19	9am-12:30pm	Vancouver	Sutton Place	
	Jul-07	9am-12:30pm	Victoria	Delta Ocean Pointe	
Fraud Happens – What to do When You Suspect Fraud	Jun-08	9am-5pm	Vancouver	Sutton Place	24
Review Engagements – Specific Topics	Jun-05	9am-5pm	Vancouver	Sutton Place	24

Financial Reporting

ASPE – Comparison to IFRS	Jul-10	9am-5pm	Vancouver	Sutton Place	25
ASPE – Construction Industry	Jul-13	9am-12:30pm	Vancouver	Sutton Place	25
ASPE – Disclosure and Presentation	Jun-12	9am-5pm	Vancouver	Sutton Place	26
	Jul-06	9am-5pm	Victoria	Delta Ocean Pointe	
ASPE – Real Estate Industry	May-26	9am-5pm	Vancouver	Sutton Place	26
ASPE – Related Party Transactions	Jun-19	9am-5pm	Vancouver	Sutton Place	27
ASPE – Review of the Standards	Jun-15 & 16	9am-5pm	Vancouver	Sutton Place	27
Compiling Financial Statements	Jun-19	1:30pm-5pm	Vancouver	Sutton Place	28
IFRS – Review of the Standards	Jun-25 & 26	9am-5pm	Vancouver	Sutton Place	28
NFPO – Review of the Standards	Jun-24	9am-5pm	Vancouver	Sutton Place	29

Management Accounting & Financial Management

Advanced Financial Statement Analysis	Jul-16	9am-5pm	Vancouver	Hyatt Regency	29
Controllership – Operational Management	Jun-26	9am-5pm	Surrey	Sheraton Guildford	30
	Aug-10	9am-5pm	Vancouver	Sutton Place	
Controllership – Strategic Leadership	Jun-23	9am-5pm	Pr George	Ramada Plaza	30
	Aug-11	9am-5pm	Vancouver	Sutton Place	
Essential Topics for Controllers	Jun-17	9am-5pm	Vancouver	Van Convention Centre West	31
Financial Management in the Construction Industry	Jun-16	9am-5pm	Vancouver	Sutton Place	31
Internal Control Refresher for Financial Managers	Jul-23	9am-5pm	Vancouver	Sutton Place	32
Interpreting Financial Statements	Jun-15	9am-5pm	Vancouver	Sutton Place	32
Powerful Financial Analysis	Jul-17	9am-5pm	Surrey	Sheraton Guildford	33
Practical Tips for Controllers & CFOs	Jul-24	9am-5pm	Vancouver	Sutton Place	33
	Jul-29	9am-5pm	Abbotsford	Quality Hotel	
Practical Tips for Not-for-Profit Financial Leaders	Jul-21	9am-5pm	Victoria	Marriott Inner Harbour	34
	Jul-23	9am-5pm	Vancouver	Sutton Place	

Finance

Business Valuations – Advanced	Jun-22	9am-5pm	Vancouver	Sutton Place	35
Business Valuations – Fundamentals	May-27	9am-5pm	Vancouver	Sutton Place	36
Business Valuations – Purchase Price Allocation	Jul-16	9am-5pm	Vancouver	Hyatt Regency	36
Cash and Treasury Management	Jul-24	9am-5pm	Vancouver	Sutton Place	37
Corporate Finance	Jun-10	9am-5pm	Vancouver	Sutton Place	37
Due Diligence for Acquisitions	Jun-23	9am-5pm	Vancouver	Fairmont Waterfront	38
Financing Strategies	Jul-20	9am-5pm	Vancouver	Hyatt Regency	38
Treasury & Finance for Accountants	Jul-13	9am-5pm	Victoria	Marriott Inner Harbour	39
	Jul-15	9am-5pm	Vancouver	Hyatt Regency	

Information & Business Technology

2020 Technology for CPAs - Don't Get Left Behind	Jul-09	9am-5pm	Victoria	Marriott Inner Harbour	40
	Jul-21	9am-5pm	Vancouver	Sutton Place	
2020 Technology Update	Jul-06	1:30pm-5pm	Vancouver	Sutton Place	41
	Jul-24	1:30pm-5pm	Surrey	Sheraton Guildford	
Advanced Data Magic - Managing, Analyzing, and Reporting	Aug-13	9am-5pm	Vancouver	Sutton Place	41
Advanced Excel	Jul-17	9am-5pm	Vancouver	Hyatt Regency	42
Advanced Excel Reporting - Best Practices, Tools and Techniques	Aug-12	9am-12:30pm	Vancouver	Sutton Place	42
An End to Manual Effort in Excel: The Power Query Effect	Jun-10	9am-5pm	Vancouver	Sutton Place	43
	Jul-06	9am-5pm	Coquitlam	Executive Plaza	
Blockchain Essentials for CPAs	Jul-15	1:30pm-5pm	Vancouver	Sutton Place	43
Budgeting and Forecasting Tools and Techniques	Jul-14	9am-5pm	Vancouver	Hyatt Regency	44
Building a Financial Model of a Company	Jun-10	9am-5pm	Vancouver	Sutton Place	44
Business Intelligence, Featuring Microsoft's Power BI Tools	Aug-11	9am-5pm	Vancouver	Sutton Place	45
Creating Vibrant Dashboards	Jun-09	9am-5pm	Abbotsford	Quality Hotel	45
Data Analysis & Communication with Excel	Jun-12	9am-5pm	Vancouver	Sutton Place	46
Data Analytics and the Future of Finance	Jul-06	9am-5pm	Vancouver	Sutton Place	46
Emerging Technologies for Accountants, Including Blockchain and Cryptocurrencies	Jul-22	1:30pm-5pm	Vancouver	Sutton Place	47
Excel: Specific Skills for Budgeting, Planning & Forecasting	Jul-08	9am-5pm	Richmond	Executive Airport Plaza	47
	Aug-19	9am-5pm	Vancouver	Hyatt Regency	
Excel: The Next Level of Skills	Jun-12	9am-5pm	Pr George	Ramada Plaza	48
	Jul-06	9am-5pm	Vancouver	Sutton Place	
Excel Boot Camp	Jul-15 & 16	9am-5pm	Vancouver	Sutton Place	48
Excel Charting and Visualizations	Jul-23	9am-12:30pm	Vancouver	Sutton Place	49
Excel Financial Models and Analysis	Jun-16	9am-5pm	Kelowna	Ramada Hotel	49
	Jul-10	9am-5pm	Surrey	Sheraton Guildford	
	Aug-18	9am-5pm	Vancouver	Hyatt Regency	
Excel Tips, Tricks and Techniques for Accountants	Jul-10	9am-5pm	Victoria	Marriott Inner Harbour	50
	Jul-13	9am-5pm	Surrey	Sheraton Guildford	
Financial Modeling – DCF Valuation Analysis	Jun-11	9am-5pm	Vancouver	Hyatt Regency	50
Foundations of Blockchain	Jul-15	9am-12:30pm	Vancouver	Sutton Place	51
Google is Not Enough: The Best Search Tools You Aren't Using (But Should!)	Jul-15	9am-5pm	Richmond	Executive Airport Plaza	51
	Aug-05	9am-5pm	Vancouver	Sutton Place	
Hands-on Techniques to Create Effective Financial Visuals in Excel and PowerPoint	Aug-14	9am-5pm	Vancouver	Sutton Place	52
How to Present Financial Data Effectively Using PowerPoint	Aug-13	9am-5pm	Vancouver	Hyatt Regency	52
Introduction to Excel Macros	Aug-12	1:30pm-5pm	Vancouver	Sutton Place	53
Intro-Mediate Excel Techniques	Jul-08	9am-5pm	Vancouver	Sutton Place	53
Modeling Project Finance: Real Estate	Jun-16	9am-5pm	Vancouver	Sutton Place	54
Power Pivot – Business Intelligence at the Heart of Excel	Jul-09	9am-5pm	Vancouver	Sutton Place	54
Power Query – Automated, Consistent Data, time after time	Jun-23	9am-5pm	Vancouver	Sutton Place	55
Rapid Dashboard Development with Power BI Desktop	Jun-11	9am-5pm	Vancouver	Hyatt Regency	55
	Jul-07	9am-5pm	Surrey	Sheraton Guildford	
Securing Your Data - Practical Tools for Protecting Information	Jul-23	1:30pm-5pm	Vancouver	Sutton Place	56
Testing and Auditing Excel Workbooks	Jul-22	9am-12:30pm	Vancouver	Sutton Place	56
Top PDF Features You Should Know	Jul-06	9am-12:30pm	Vancouver	Sutton Place	57
VBA Fundamentals: From Zero to Hero	Jul-13 & 14	9am-5pm	Vancouver	Sutton Place	57
Visual Analytics and Dashboards (i2VSA)	Jul-07 & 08	9am-5pm	Vancouver	Sutton Place	58

People Management & Personal Development

Communication & Negotiation

Becoming a Skilled Negotiator	Jun-10	9am-5pm	Surrey	Sheraton Guildford	60
	Jul-15	9am-5pm	Vancouver	Sutton Place	
Clear Thinking/Clear Speaking	Jun-22	9am-5pm	Vancouver	Sutton Place	60
Communicating Effectively Under Pressure	Jun-09	9am-5pm	Vancouver	Sutton Place	61
Conflict: Changing Viewpoints & Influencing Behaviors	Aug-18	9am-5pm	Vancouver	Sutton Place	61
Principles of Negotiation	Jul-21	9am-12:30pm	Vancouver	Sutton Place	62
Tools for Communicating with Difficult People	Jun-18	9am-5pm	Coquitlam	Executive Plaza	62
	Jul-10	9am-5pm	Vancouver	Sutton Place	
Top Talks: How to Talk to Decision-Makers	Jul-21	9am-12:30pm	Vancouver	Sutton Place	63
You're Speaking - But Are You Connecting?	Jul-24	9am-12:30pm	Vancouver	Sutton Place	63

Problem-Solving & Decision-Making

A Coach Approach to Problem Solving	Jun-10	9am-5pm	Coquitlam	Executive Plaza	64
	Jun-17	9am-5pm	Vancouver	Van Convention Centre West	
Achieving Results Through Collaborative Projects	Aug-07	9am-5pm	Vancouver	UBC Robson	64
Project Management: Tips & Traps	Aug-11	9am-5pm	Vancouver	Sutton Place	65

Professional & Ethical Behaviour

A Threats and Safeguards Approach to Ethical Decision Making	May-20	8:30am-12:30pm	Richmond	Executive Airport Plaza	65
	May-21	8:30am-12:30pm	Vancouver	UBC Robson Square	
	Jun-11	8:30am-12:30pm	Kelowna	Ramada Hotel	
	Jun-25	8:30am-12:30pm	Abbotsford	Quality Hotel	
	Jul-20	8:30am-12:30pm	Burnaby	Hilton Metrotown	
	Aug-19	8:30am-12:30pm	Vancouver	UBC Robson Square	
Becoming an Ethical Leader	May-20	8:30am-12:30pm	Vancouver	Sutton Place	66
	Jun-30	8:30am-12:30pm	Kamloops	Coast Kamloops	
	Jul-07	8:30am-12:30pm	Victoria	Marriott Inner Harbour	
	Aug-13	8:30am-12:30pm	Vancouver	Sutton Place	
	Aug-14	8:30am-12:30pm	Richmond	Executive Airport Plaza	
Business Ethics: It Starts With You	May-26	8:30am-12:30pm	Surrey	Sheraton Guildford	66
	May-26	1pm-5pm	Surrey	Sheraton Guildford	
	May-27	8:30am-12:30pm	Burnaby	Hilton Metrotown	
	May-27	1pm-5pm	Burnaby	Hilton Metrotown	
	Jun-09	8:30am-12:30pm	Coquitlam	Executive Plaza	
	Jun-09	1pm-5pm	Coquitlam	Executive Plaza	
	Jul-14	8:30am-12:30pm	Victoria	Marriott Inner Harbour	
	Jul-16	8:30am-12:30pm	Vancouver	Sutton Place	
	Jul-22	8:30am-12:30pm	Vancouver	Sutton Place	
	Jul-22	1pm-5pm	Vancouver	Sutton Place	
Ethical Leadership in an Age of AI	May-14	8:30am-12:30pm	Victoria	Marriott Inner Harbour	67
	Jun-24	8:30am-12:30pm	Surrey	Sheraton Guildford	
	Jul-24	8:30am-12:30pm	Vancouver	UBC Robson	
Ethics and Technology	Jul-07	8:30am-12:30pm	Vancouver	UBC Robson	67
	Jul-08	8:30am-12:30pm	Victoria	Marriott Inner Harbour	
	Jul-24	8:30am-12:30pm	Surrey	Sheraton Guildford	
Ethics at our Core	Jul-24	1pm-5pm	Vancouver	UBC Robson	68
Shades of Grey: Ethics in the Workplace	May-20	1pm-5pm	Vancouver	Sutton Place	69
	Jun-30	1pm-5pm	Kamloops	Coast Kamloops	
	Jul-07	1pm-5pm	Victoria	Marriott Inner Harbour	
	Jul-31	8:30am-12:30pm	Nanaimo	Vancouver Island Conference Ctr	
	Aug-13	1pm-5pm	Vancouver	Sutton Place	
	Aug-14	1pm-5pm	Richmond	Executive Airport Plaza	
Understanding and Embracing Ethics in the Workplace	Jun-12	8:30am-12:30pm	Vancouver	UBC Robson	69

Self Management

Achieving Balance in Work and Life	Aug-10	9am-5pm	Vancouver	Sutton Place	69
Balancing Your Wheels	Jun-15	9am-5pm	Vancouver	Sutton Place	70
Becoming...what you really want to be	Aug-20	9am-5pm	Vancouver	Sutton Place	70
Brain Focus: The Power of Full Engagement	Jun-08	9am-12:30pm	Vancouver	Sutton Place	71
Coach Yourself First	Jun-04	9am-5pm	Abbotsford	Quality Hotel	71
Critical Thinking and Self Reflection	Jun-17	9am-5pm	Richmond	Executive Airport Plaza	72
Influence and Assertiveness	Aug-05	9am-5pm	Vancouver	Sutton Place	72
Personal Effectiveness: Self Awareness and Balanced Thinking	Jul-08	9am-5pm	Surrey	Sheraton Guildford	73
Professional Presence	Jul-07	9am-5pm	Vancouver	Sutton Place	73
Shortcut to Success: The 14 Best Tools for Personal and Professional Growth	Aug-11	9am-5pm	Vancouver	Sutton Place	74
Time Management: The Essentials of Productivity Skills	Jul-16	9am-5pm	Kelowna	Coast Capri	74
	Jul-29	9am-5pm	Surrey	Sheraton Guildford	
	Aug-21	9am-5pm	Vancouver	Sutton Place	
Triple Your Reading Speed	Jul-27	9am-5pm	Vancouver	Hyatt Regency	75
We Have to Talk - Having the Difficult Conversations	Jul-23	9am-5pm	Vancouver	Sutton Place	75

Teamwork & Leadership

Assessing and Responding to Workgroup Conflict	Jul-13	9am-12:30pm	Vancouver	Sutton Place	76
Building High Performance Teams	Aug-19	9am-5pm	Vancouver	Sutton Place	76
Coaching for Executive Excellence	Jun-12	9am-5pm	Vancouver	Sutton Place	77
Dispelling the Myth of "Effective Meetings"	Aug-14	9am-12:30pm	Vancouver	Sutton Place	77
Effective & Essential Management Skills	Jun-11	9am-5pm	Pr George	Ramada Plaza	78
	Jul-20	9am-5pm	Vancouver	Hyatt Regency	
	Aug-10	9am-5pm	Surrey	Sheraton Guildford	
Empowering and Engaging Others	Jul-28	9am-5pm	Vancouver	Sutton Place	78
Essence of Leadership	Jun-26	9am-5pm	Vancouver	Sutton Place	79
Giving and Receiving Feedback in the Workgroup	Jun-25	9:30am-12:30pm	Vancouver	Sutton Place	79
Leadership and Coaching	Jun-15	9am-5pm	Vancouver	Sutton Place	80
Learning to Lead	Aug-13	9am-5pm	Vancouver	Sutton Place	80
Managing Across Generations	Jul-16	1:30pm-5pm	Vancouver	Sutton Place	81
Managing My People	Jun-11	9am-5pm	Surrey	Sheraton Guildford	81
	Jul-16	9am-5pm	Vancouver	Hyatt Regency	
What Do People Want? Motivating Yourself & Others	Aug-06	9am-5pm	Vancouver	Sutton Place	82
Wiring Your Brain for High Impact Leadership	Jun-18	9am-5pm	Kelowna	Ramada Hotel	82
	Jul-20	9am-5pm	Vancouver	Sutton Place	

Public Practice Management

Considering Starting a CPA Practice	Available Online				83
Starting a Successful CPA Practice	Jul 15	9am-5pm	Vancouver	Sutton Place	83

Strategy, Governance, Risk & Human Resource

Digital Transformation - To do or Not to Do	Aug-14	9am-5pm	Vancouver	Sutton Place	84
Employment Law & HR Practices	May-20	9am-5pm	Vancouver	Sutton Place	85
	Jun-03	9am-5pm	Nanaimo	Vancouver Island Conference Ctr	
	Jun-23	9am-5pm	Burnaby	Hilton Metrotown	
Employment Standards Overview	Jul-17	9am-12:30pm	Vancouver	Sutton Place	85
Leading Strategy into Action	Jun-10	9am-5pm	Surrey	Sheraton Guildford	86
	Jul-15	9am-5pm	Victoria	Marriott Inner Harbour	
	Aug-07	9am-5pm	Vancouver	UBC Robson	
Public Sector and Not-for-Profit Sector Performance Management	Jul-07	9am-5pm	Victoria	Marriott Inner Harbour	86
	Aug-12	9am-5pm	Vancouver	Sutton Place	
Strategic HR Planning	Jul-08	9am-5pm	Vancouver	Sutton Place	87
Understanding the Financial Risk of Employee Benefits	Jun-18	9am-12:30pm	Vancouver	Sutton Place	87

Strategic Management Certificate & Advanced Strategic Management Certificate Programs

Strategic Management Certificate: Risk Management & Governance	Jun-24	9am-5pm	Vancouver	Sutton Place	88
	Jul-10	9am-5pm	Kelowna	Coast Capri	
Strategic Management Certificate: Strategic Planning	Jun-30	9am-5pm	Vancouver	Sutton Place	88
	Jul-09	9am-5pm	Kelowna	Coast Capri	
	Jul-15	9am-5pm	Vancouver	Hyatt Regency	
Strategic Management Certificate: Change Management	Jun-29	9am-5pm	Vancouver	Sutton Place	89
	Jul-22	9am-5pm	Surrey	Sheraton Guildford	
Strategic Management Certificate: Team Development	Jul-21	9am-5pm	Surrey	Sheraton Guildford	89
	Jul-28	9am-5pm	Vancouver	Sutton Place	
	Aug-19	9am-5pm	Vancouver	Hyatt Regency	
Advanced Strategic Management Certificate: Links	Jun-23	9am-5pm	Vancouver	Fairmont Waterfront	90
	Jul-27	9am-5pm	Vancouver	Hyatt Regency	
Advanced Strategic Management Certificate: Maps	Jul-14	9am-5pm	Vancouver	Hyatt Regency	90
	Aug-18	9am-5pm	Vancouver	Hyatt Regency	

Taxation

Advanced Tax Planning for Business Succession	Jul-23	9am-5pm	Vancouver	Hyatt Regency	91
Canadian Capital Additions and CCA: The Latest	Jul-08	8am-10am	Vancouver	Sutton Place	92
Corporate Restructuring – Fundamentals	Aug-13	9am-5pm	Vancouver	Hyatt Regency	92
Corporate Tax - Investment Holding Companies	Jun-18	9am-12:30pm	Vancouver	Sutton Place	93
	Jul-22	9am-12:30pm	Vancouver	Sutton Place	
Corporate Tax – RDTOH, CDA & Other Tax Accounts	Jul-14	1:30pm-5pm	Vancouver	Sutton Place	93
Corporate Tax – Review of Tax Planning	Jul-27 & 28	9am-5pm	Vancouver	Sutton Place	94
Corporate Tax – Section 55: How Safe Are Your Dividends?	Jul-14	9am-12:30pm	Vancouver	Sutton Place	94
CRA Business Audits and Settlement Strategies	Jun-09	8am-10am	Vancouver	Sutton Place	95
Creative Use of Partnerships in Tax Planning	Jun-19	9am-12:30pm	Vancouver	Sutton Place	95
Employing Contractors and Contracting Employees: Sorting Out Tax and Legal Issues	Jun-16	8am-10am	Vancouver	Sutton Place	96
Ethical Tax	Jun-23	8am-10am	Vancouver	Sutton Place	96
Income Tax – Principal Residences	Jul-17	9am-12:30pm	Vancouver	Sutton Place	97
Income Tax – Real Estate	Jul-23	9am-5pm	Vancouver	Hyatt Regency	97
Life-Interest Trusts as Will Substitutes	Jun-17	9am-12:30pm	Vancouver	Van Convention Centre West	98
Personal Tax – Review of Tax Planning	Jul-06 & 07	9am-5pm	Vancouver	Sutton Place	98
RIP - Estate Planning	Jul-15	9am-5pm	Vancouver	Hyatt Regency	99
Tax for Controllers	Jun-10 & 11	9am-5pm	Vancouver	Sutton Place	99
US Corporate Tax - Fundamentals	Jul-17	9am-5pm	Vancouver	Hyatt Regency	100

Wealth Management

Enough Bull: How to Retire Well Without the Stock Market	Jun-19	9am-5pm	Vancouver	Sutton Place	101
Money, Love and the Law	Jun-25	9am-12:30pm	Vancouver	Sutton Place	102
Smoke and Mirrors: Financial Myths that will Ruin Your Retirement Dreams	Jun-17	9am-5pm	Surrey	Sheraton Guildford	102
	Jun-18	9am-5pm	Vancouver	Sutton Place	
The Procrastinator's Guide to Retirement	Jul-23	9am-5pm	Victoria	Marriott Inner Harbour	103
The Psychology of Investing	Jul-13	9am-12:30pm	Vancouver	Sutton Place	103
The Simplest Personal Finance Strategy Ever	Jul-22	9am-5pm	Vancouver	Sutton Place	104
	Jul-24	9am-5pm	Richmond	Executive Airport	
Unveiling the Retirement Myth	Aug-13	9am-5pm	Surrey	Sheraton Guildford	104
	Aug-14	9am-5pm	Vancouver	Sutton Place	

PD Nexus

PD Nexus: Business Insights Victoria	Jul-14	8:30am-4:30pm	Victoria	Victoria Conference Centre	106
PD Nexus: Business & Leadership Insights Vancouver	Jul-09	8:30am-4:30pm	Vancouver	Van Convention Centre West	106
PD Nexus: Information Technology Conference 2020	Jun-18 & 19	8:30am-4:30pm	Vancouver	Van Convention Centre West	107

How to register

- On our secure website at pd.bccpa.ca
- By phone 604 872.7222 (ask for the PD Department)
- By email to pdreg@bccpa.ca (only for registrations with no credit card payments – please do not include credit card information by email)
- By mail to the CPABC 800-555 West Hastings Street, Vancouver, BC V6B 4N6 (Registration form on page 132)

Our Spring/Summer 2020 program includes seminars until late August. The Fall/Winter 2020 Catalogue will be available in August and will include seminars from September 2020 to March 2021.

Abbotsford

Quality Hotel & Conference Centre — Tel 604 870.1050
36035 North Parallel Road — www.qualityhotelabbotsford.com

Burnaby

Hilton Vancouver Metrotown — Tel 604 438.1200
6083 McKay Ave — www.hilton.com

Coquitlam

Executive Plaza Hotel — Tel 604 433.3932
405 North Road — www.executivehotels.net

Kamloops

Coast Kamloops Hotel & Convention Centre — Tel 250 828.6660
1250 Rogers Way — www.coasthotels.com

Kelowna

Coast Capri Hotel — Tel 250 860.6060
1171 Harvey Avenue — www.coastcaprihotel.com

Ramada Hotel & Conference Centre — Tel 250 860.9711
2170 Harvey Avenue — www.ramadalodgehotelkelowna.com

Nanaimo

Vancouver Island Conference Centre — Tel 250 244.4050
101 Gordon Street — www.viconference.com

Prince George

Ramada Plaza Prince George — Tel 250 563.0055
444 George Street — www.ramadaprincegeorge.com

Richmond

Executive Airport Plaza Hotel — Tel 604 278.5555
7311 Westminster Highway — www.executivehotels.net

Surrey

Sheraton Guildford Hotel — Tel 604 582.9288
15269 – 104th Avenue — www.sheratonguildford.com

Victoria

Comfort Inn & Suites — Tel 250 382.4400
3020 Blanshard Street — www.comfortvictoria.ca

Delta Victoria Ocean Pointe — Tel 250 360.2999
100 Harbour Road — www.marriott.com

Victoria Conference Centre — Tel 250 361.1000
720 Douglas Street — www.victoriaconference.com

Victoria Marriott Inner Harbour Hotel — Tel 250 480.3800
728 Humboldt Street — www.marriottvictoria.com

Vancouver

Fairmont Waterfront — Tel 604 691.1991
900 Canada Place — www.fairmont.com/waterfront-vancouver

Hyatt Regency — Tel 604 683.1234
655 Burrard Street — vancouver.hyatt.com

Sutton Place Hotel — Tel 604 682.5511
845 Burrard Street — www.suttonplace.com/vancouver

UBC Robson — Tel 604 822.3333
800 Robson Square — robsonsquare.ubc.ca

Van Convention Centre West — Tel 604 689.8232
1055 Canada Place — www.vancouverconventioncentre.com

Whistler

Hilton Whistler Resort — Tel 604 905.3987
4050 Whistler Way — www.marriott.com

Westin Whistler Resort — Tel 604 905.5000
4090 Whistler Way — www.westinwhistler.com

In-House Presentation Services

Tailored to YOUR needs

We realize that members work in diverse roles and industries, and that seminars tailored and relevant to you are sometimes difficult to locate. CPABC PD In-House Presentation Services can provide you with that customizable solution. We offer seminars in various topics, and our instructors can work with you to customize the seminars so that they focus on your specific needs. Contact us at **pdreg@bccpa.ca** for more information.

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.**
Easy	**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 gain more personalized interaction with the instructor.**

"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

"We at Manning Elliott have used the In-House PD Program for a few years now and find that it is an economical and effective way to deliver PD. Additionally, we have reaped an unexpected benefit as having in-house PD courses fosters team building amongst our people."

Keith Elliott, Partner
Manning Elliott LLP, Vancouver, BC

«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

Continuing Professional Development Requirements for CPABC Members

Continuing Professional Development (CPD) is learning that develops and maintains professional competence to enable members to continue to perform their professional roles. Any learning and development that is relevant and appropriate to a member's work and professional responsibilities and growth as a CPA will qualify for CPD. Members need to determine what learning activities qualify for CPD based on his or her own professional needs and circumstances.

Rule 203 of the CPABC Code of Professional Conduct – Professional Competence

A member shall sustain professional competence by keeping informed of, and complying with, developments in professional standards in all functions in which the member provides professional services or is relied upon because of the member's calling.

In order to comply with Rule 203, a member may need to complete more than the minimum CPD requirement established by Bylaw Regulation.

Minimum CPD Requirements – Part 6 of CPABC Bylaw Regulations

Minimum Requirements	**Verifiable Hours**	**Additional Hours***	**Total Hours**
Annual	10	10	20
Rolling three-calendar-year period, including 4 hours of verifiable professional ethics	60	60	120

* *Additional hours can be fulfilled with verifiable and/or unverifiable CPD*

Verifiable CPD

Verifiable CPD refers to learning activities for which there is satisfactory evidence to objectively verify participation. The number of eligible CPD hours for learning activities in this PD brochure is provided in the course description. Members may only report the actual time that was spent developing new or existing competencies in the course.

Verifiable Professional Ethics CPD

Members must complete a minimum of four hours of verifiable professional ethics, as part of the 60 verifiable hours, in each rolling three-calendar-year period. The four hours can be obtained in a single program or can accumulate through various separate activities over the three years. For additional information, please refer to our website at www.bccpa.ca/cpd-ethics-requirement.

Unverifiable CPD

Includes learning activities relevant to a member's professional role that cannot be verified objectively, such as casual reading of professional journals/magazines.

CPD Reporting

CPD reporting is available on CPABC's Online Services website https://services.bccpa.ca. CPD reports are due by January 31 for the previous calendar year. Members may record their CPD activities online throughout the year as they undertake them. Failure to complete and report CPD requirements on a timely basis will result in a $200 late reporting administrative fee, suspension of membership and/or cancellation of membership.

Newly Admitted Members

Beginning in 2019, all new members are required to report CPD in the year of admission. The CPD reporting year is the calendar year. There is no proration of the CPD requirements in the year of admission. CPD completed anytime in the calendar year will be eligible for CPD credit in the first year of reporting. The first rolling three-calendar-year period begins in the year of admission.

CPD Verification

Members are required to retain documentation supporting their CPD activities for five years after the end of the reporting period. Annually, a sample of CPD reports is verified for the preceding three-calendar-year period. There is no need to submit the supporting records unless requested.

Additional Information

For further information, please refer to our website at **www.bccpa.ca**, or contact Lisa Murray, CPD Administrator at 604 488.2614 or cpd@bccpa.ca

Accounting & Assurance

Audit & Assurance

Financial Reporting

Management Accounting & Financial Management

Finance

SEMINAR MATERIAL: PAPERLESS
OPTIONAL: LAPTOP

Audit Engagements – Application of the Standards Using PEG

LEVEL Intermediate

Prerequisite

Participants should be familiar with the *CPA Handbook – Assurance* and have some experience performing audits.

Overview

This seminar provides practical guidance on how to perform effective and efficient small to medium sized audit engagements, including not for profit entities. Using audit methodology contained in Volume 2 of PEG, this course will address problem areas encountered in practice and often reported in the provincial practice inspection findings related to audit. This includes identifying risks, particularly at the financial statement level, developing fraud scenarios and then responding to such risks, identifying relevant internal controls and practical guidance on the extent of testing. Using real world examples and exercises, participants will unlock the full potential of PEG and its practical aids to reduce engagement time and improve results.

Course Description

This course will take participants through each of the steps involved in performing a small audit. This includes client acceptance, understanding the entity, materiality, planning, how to identify and respond to risks, customizing work programs, testing, monitoring work as it progresses, documenting working papers and communicating findings internally and then to the client on a timely basis.

Applicable for

Practitioners and professional staff who perform audit engagements and would like a refresher on how to perform an audit efficiently and effectively using PEG.

Content

- an overview of PEG and its objectives including the PEG 12 step audit process
- risk assessment and engagement planning activities
- risk response, including developing the audit strategy and work programs, documenting the work performed, and evaluating evidence obtained
- forming an opinion and communicating results with management and those charged with governance
- keys to a successful audit

Ethics Hours

This seminar contains 0.5 hours of ethics content.

Seminar Material Format

Paperless materials. Print copy option available for $20.

Seminar Leader

Terry Gunderson, CPA, CA

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

For dates, times and venues – see page 13

Audit Engagements – Review of the Standards

LEVEL Introductory to Intermediate

Prerequisite

Participants should have some familiarity with the *CPA Handbook – Assurance*.

Overview

Developed with the needs of professional accountants working in public practice in mind, this seminar provides a solid foundation in the practical application of the Canadian Auditing Standards (CAS) to audit engagements. The course reviews key CAS requirements with an emphasis on areas identified as common pitfalls by CPA national practice inspection findings. Participants will also explore the key elements of documenting an engagement working paper file including, planning, engagement execution, and reporting.

Course Description

Using a case study approach, participants will develop a deeper understanding of how to apply the Canadian Auditing Standards to a set of client-specific facts. Participants will explore documentation alternatives, and learn practical tools and techniques for planning, performing, concluding and documenting their audit engagements in an effective and efficient manner.

Applicable for

Audit practitioners at all levels of experience, who want to refresh their understanding of the CAS in order to apply the standards more effectively and efficiently.

Content

- audit quality
- communication with others
- audit documentation
- acceptance & overall audit strategy
- internal control
- risk assessment
- audit procedures
- conclusion and reporting

Ethics Hours

This seminar contains 0.75 hours of ethics content.

Seminar Material Format

Paperless materials. Print copy option available for $20.

Seminar Leader

Robin Diehl, CPA, CA, CBV

Fee $785 PD Passport Valid - 2 Passport Days 14 Eligible CPD Hours

Compilation Engagements – Overview of the New Standards (CSRS 4200)

LEVEL Introductory

Prerequisite

None.

Overview

This professional development course provides participants with an overview of the requirements of the new Canadian Standard for Related Services (CSRS) 4200 and its impact on the planning, implementation and documentation of a compilation engagement.

By the end of this course, participants will be able to
- describe the requirements of the new standard and the differences from the current standard
- identify the stages of the engagement that will be affected by the new standard
- assess the impact of the new standard on the work to be performed and documented

Applicable for

Public practitioners and CPAs employed in public practice that conduct compilation engagements who wish to learn about the new standard, how it may affect their current processes, and how to start preparing to ensure an eventual successful implementation.

Content

- why change is needed to compilation engagement standards?
- the revised scope of compilation engagements under the new standard
- overview of new and revised compilation engagement concepts:
  - basis of accounting
  - misleading information
  - professional judgment
  - dstribution to third parties
- overview of key changes from Section 9200 to CSRS 4200:
  - requirements for accepting and continuance of engagements
  - requirements for work to be performed including: the practitioner's knowledge; discussions with management regarding significant judgments
  - financial statement disclosure requirements
  - reporting requirements and the date of the practitioner's report
- key considerations for designing your implementation plan

Seminar Material Format

Paperless materials. Print copy option available for $20.

Seminar Leader to be drawn from

Tom Gillespie, CPA, CA
Shane Schepens, CPA, CA

Fee $225 PD Passport Valid – 1/2 Passport Day 3.5 Eligible CPD Hours

Fraud Happens – What to do When You Suspect Fraud

LEVEL Intermediate

Prerequisite

None.

Overview

Companies must respond in an appropriate way to concerns about fraud and related inappropriate conduct. A "knee-jerk" reaction can lead to many negative consequences. A rational reaction plan is critical. This seminar will provide best practices for conducting an organized financial investigation.

Course Description

It will assist participants through the many challenges that companies face in such matters, and will provide "real life" examples of fraud, integrating a complex financial investigation case while examining the potential phases of such an investigation.

Applicable for

Members in industry who require knowledge of the complexities involved with planning and conducting a financial investigation. Members in public practice will also benefit as participants will understand the importance of complying with the CPA Canada Standard Practices for Investigative and Forensic Accounting Engagements.

Content

- introduction to fraud/fraud indicators
- planning an investigation
- interviewing basics
- investigative research
- digital forensics
- legal tools and remedies
- landmark fraud cases

Content Note

There is some limited overlap between this seminar and *Fraud Risk Management*, which describes the five major principles of fraud risk management as organized by COSO. This seminar goes into much more detail about relevant investigative and legal tools and techniques for performing financial investigations.

Seminar Material Format

Paperless materials. Print copy option available for $20.

Seminar Leader

Rosanne Walters, CPA, CA, CBV, CFE, CFF

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

Review Engagements – Specific Topics

LEVEL Intermediate

Prerequisite

Review Engagements: Introduction to the New Standard or *Review Engagements: Application of the New Standards*, or equivalent knowledge.

An online version of *Review Engagements: Overview of CSRE 2400* is available if you require fundamental knowledge of the standard to meet the prerequisites.

Overview

This seminar will identify and discuss in detail the common application issues for review engagements under the new CSRE 2400 standard.

Course Description

The course is not intended to be a comprehensive overview of CSRE 2400, but will build upon content from previous courses on CSRE 2400 by addressing the common documentation issues. Participants will learn how to quickly identify incomplete review engagement documentation, and understand what needs to be done and documented to resolve outstanding issues. The material includes various exercises and examples of review engagement documentation.

Applicable for

Practitioners and engagement staff who are conducting review engagements under CSRE 2400.

Content

- overview of the documentation requirements, and how to strike the right balance to meet the documentation standards
- common CSRE 2400 application and documentation deficiencies noted by provincial CPA practice inspection programs
- tips for addressing common deficiencies such as documenting client/engagement acceptance/continuance, assessment of independence, assessment of whether an EQCR is required, using the correct review engagement report, and dating the report
- improving documentation of the understanding the entity and its environment using alternative approaches to documenting the client's accounting systems
- documenting the identification of areas in the financial statements where material misstatements are likely to arise, and linking them to the planned review procedures
- designing and documenting appropriate analytical procedures for revenue, inventory, cost of sales, and payroll.
- performing of additional procedures, such as cut-off procedures, confirmations, and substantive test of details

Seminar Material Format

Paperless materials. Print copy option available for $20.

Seminar Leader

Tom Gillespie, CPA, CA

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

For dates, times and venues – see page 13

ASPE – Comparison to IFRS

LEVEL Introductory

Prerequisite

None.

Overview

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.

Course Description

Participants will learn about the major differences between Accounting Standards for Private Enterprises (ASPE) and publicly accountable enterprises using International Financial Reporting Standards (IFRS) with an eye toward giving participants the ability to identify the major similarities and significant differences between the two sets of standards and how these differences impact financial statements. You will also learn about the impact of current developments and changes to standards in IFRS and how they will impact ASPE, and the one-time considerations on transitioning between the two sets of standards. This will allow you determine the appropriate standard for an entity and to explain the differences to interested parties e.g. Board members.

Applicable for

CPAs who want to understand the key differences between IFRS and ASPE to determine which set of standards would be most appropriate for an entity and be able to explain the impact of the differences on the entity's financial statements and the implications of using IFRS compared to ASPE.

Content

- conceptual framework, fair value measurement
- standards related to financial statement presentation, including non-current, non-financial assets, property, plant and equipment, investment property, agriculture, intangible assets and impairment
- borrowing costs, assets held for sale, financial instruments, joint arrangements and investment
- other liabilities, including asset retirement obligations, provisions, contingencies, employee benefits and income taxes
- leases (new standard) and revenue recognition
- other standards, including inventories, subsequent events, government grants, foreign currency, consolidated financial statements, non-controlling interests, investments, related party transactions and stock based compensation
- first-time adoption

Seminar Material Format

Paperless materials. Print copy option available for $20.

Seminar Leader

Diane McDonald, CPA, CA

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

ASPE – Construction Industry

LEVEL Intermediate

Prerequisite

Familiarity with *CPA Handbook – Accounting Part II ASPE*, and knowledge of the construction industry business practices.

Overview

This seminar explores the Part II – Accounting Standard for Private Enterprises (ASPE) that are applicable to the construction industry in a practical manner. For the purposes of this seminar, construction industry includes construction contractors with various activities. A contractor may engage in those activities as a general contractor or subcontractor, and does not necessarily have the ownership of real estate, but is acting as a vendor to the builders, developers and landlords that have direct or indirect ownership of the real estate. The seminar will also cover the disclosure requirements and other issues specific to construction contracts.

Course Description

As the construction industry continues to become a larger part of the Canadian economy, a similar increase in the level of complexity of industry practices has been observed. This leaves practitioners with the challenge of applying the standard in this ever-changing landscape. This half-day course is designed to enable the practical application of the ASPE standard to construction entities. Emphasis will be placed on the application of revenue recognition and other accounting policies using specific scenarios and practical illustrative examples.

Applicable for

Controllers, Directors of Finance or CFOs in construction entities; professional accountants in public practice; and professionals seeking knowledge of construction accounting.

Content

- common business practices in the construction industry
- revenue recognition under the percentage of completion method
- revenue recognition under the completed contract method
- unbilled receivable and deferred revenue
- holdbacks receivable and payable
- other financial reporting implications
  - change orders
  - claims
  - incentives and penalties
  - impairment

Seminar Material Format

Paperless materials. Print copy option available for $20.

Seminar Leader

Tom Gillespie, CPA, CA

Fee $225 | **PD Passport Valid – 1/2 Passport Day** | **3.5 Eligible CPD Hours**

ASPE – Disclosure and Presentation

LEVEL Intermediate

Prerequisite

The seminar does not address recognition and measurement; therefore, a good working knowledge of the recognition and measurement standards would be beneficial.

Overview

This seminar reviews the reality and best practices for disclosure and presentation requirements of Part II – Accounting Standards for Private Enterprises (ASPE). The seminar will start with a basic private enterprise financial statement, showing the common presentation and disclosure requirements and will then build on those statements with additional disclosure and presentation matters. Each disclosure and presentation requirement of ASPE will be reviewed and examples will be provided (sample financial statements are developed during the seminar).

Course Description

Much was said about reduced disclosure for private enterprises when ASPE was issued, but what is the reality and what are best practices now? The objective of this seminar is to provide participants with knowledge and understanding of the financial statement disclosure and presentation requirements for ASPE.

This full-day seminar reviews disclosure and presentation requirements of ASPE, from cash to cash flow; from financial instruments to equity instruments; and from the known to the contingent, using examples of all ASPE disclosure and presentation requirements. The seminar will be delivered primarily through discussion of examples with some exercises.

Applicable for

Practitioners who serve private enterprises and those who prepare financial statements for private enterprises.

Content

- disclosure requirements provided in Part II of the *CPA Canada Handbook – Accounting*
- applying professional judgment in developing sufficient disclosure
- identifying options and choices in presentation
- presentation and disclosure requirements in Sections 1000 through Section 3870 and the Guidelines in Part II of the *CPA Canada Handbook – Accounting*

Seminar Material Format

Paperless materials. Print copy option available for $20.

Seminar Leader

Tom Gillespie, CPA, CA

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

ASPE – Real Estate Industry

LEVEL Intermediate

Prerequisite

Participants should be familiar with the *CPA Handbook – Assurance, Part II Accounting Standards for Private Enterprises* (ASPE).

Overview

Real estate entities have unique financial reporting issues under Accounting Standards for Private Enterprise (ASPE). This course will use exercises and examples to illustrate these issues to provide practical advice for those involved.

Course Description

This seminar reviews the Accounting Standards for Private Enterprise (ASPE) applicable to the real estate industry – both developers and those with income producing properties, using industry guidance available from the Real Property Association of Canada (REALpac). Participants will discuss the unique accounting issues encountered by builders, developers and landlords who have direct or indirect ownership in real estate.

Applicable for

Professionals involved in the preparation of private enterprise financial statements for real estate companies and practitioners who serve private clients in the real estate industry.

Content

- accounting for real estate development costs
- accounting for construction of rental properties
- interest capitalization and accounting for transaction and financing fees
- accounting for holdbacks
- revenue recognition on sale of real estate
- revenue recognition from rental properties
- impairment of real estate properties
- contract modifications and claims
- determining cost of sales for properties sold

Seminar Material Format

Paperless materials. Print copy option available for $20.

Seminar Leader

Diane McDonald, CPA, CA

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

For dates, times and venues – see page 13

SEMINAR MATERIAL PAPERLESS · OPTIONAL LAPTOP

ASPE – Related Party Transactions

LEVEL Intermediate

Prerequisite

Participants should be familiar with the *CPA Handbook – Assurance, Part II Accounting Standards for Private Enterprises* (ASPE).

Overview

This one day course is designed to address the challenges faced by preparers of ASPE financial statements and practitioners with respect to the recognition, measurement, presentation and disclosure of related party transactions and balances under ASPE.

Course Description

Accounting for related party transactions is one of the most complicated areas of applying accounting standards for private enterprises (ASPE) and it is an area of accounting regularly cited for deficiencies by practice inspection. Now there are new developments with changes to ASPE 3856 accounting for retractable and mandatorily redeemable shares and accounting for financial instruments in related party transactions.

Applicable for

Professionals involved in the preparation of private enterprise financial statements and practitioners who serve private clients with related party transactions.

Content

- what is a related party transaction and who are related parties?
- how should related party transactions be measured – at cost, exchange amount or fair value?
- when and how does Section 3856, Financial Instruments apply to related party transactions?
- should related party financial instruments be classified as current or non-current?
- how to assess collectability of related party receivables?
- should gains and losses on related party transactions recorded in profit and loss or as a capital transaction?
- disclosure requirements under Section 3840 including the terminology dos and don'ts
- accounting for business combinations among related parties
- accounting for amalgamations, wind-ups and other combinations involving related parties

Seminar Material Format

Paperless materials. Print copy option available for $20.

Seminar Leader

Diane McDonald, CPA, CA

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

SEMINAR MATERIAL PAPERLESS · OPTIONAL LAPTOP · AVAILABLE OPTION ONLINE

ASPE – Review of the Standards

LEVEL Introductory

Prerequisite

Participants should be familiar with the *CPA Handbook – Accounting Part II.*

Overview

This two-day seminar is designed to review Part II – Accounting Standards for Private Enterprises (ASPE) from cover to cover, encompassing all sections and guidelines. In addition, this seminar will identify and outline the accounting policy choices available to management in applying ASPE. Examples and exercises will cover some of the newer or more common concepts of accounting used by private enterprises or areas where practice review has identified struggles or challenges. A high level overview to address ASPE application for not-for-profit organizations will also be included.

Course Description

This two-day seminar is designed to review Part II – Accounting Standards for Private Enterprises (ASPE) from cover to cover, encompassing all sections and guidelines. In addition, this seminar will identify and outline the accounting policy choices available to management in applying ASPE. Examples and exercises will cover some of the newer or more common concepts of accounting used by private enterprises or areas where practice review has identified struggles or challenges.

Applicable for

Those seeking a robust and complete review of ASPE. Individuals involved in the not-for-profit sector may also find this seminar useful because of the ASPE measurement, recognition, presentation and disclosure requirements applicable to not-for-profit accounting and reporting.

Content

- accounting standards framework and general standards
- financial instruments
- tangible assets
- long-term assets
- non-financial liabilities
- shareholder equity
- revenue and other expenses
- other disclosures and other matters
- sample financial statements
- numerous note examples
- transition guidance (appendix)

Seminar Material Format

Paperless materials. Print copy option available for $20.

Seminar Leader

Diane McDonald, CPA, CA

Fee $785 | **PD Passport Valid - 2 Passport Days** | **14 Eligible CPD Hours**

Compiling Financial Statements

LEVEL Introductory

Prerequisite

None.

Overview

This seminar discusses relevant accounting concepts for compiling financial statements.

Course Description

This seminar 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 seminar also serves as an introduction to the financial reporting concepts included in the *CPA Handbook – Accounting*. The course content includes a discussion of general requirements to prepare financial statements that would be suitable for use in preparing a corporate tax return.

This course is complemented by and can be taken in connection with the *Compilation Engagements – Review of Section 9200* seminar.

Applicable for

Individuals who are compiling financial statements, as well as those who are looking to develop or refresh their knowledge of financial reporting concepts. This course can also act as a prerequisite course for those interested in attending other professional development courses on specific financial reporting frameworks such as ASPE, ASNPO or IFRS.

Content

- compiled financial statements vs. those prepared in accordance with a framework
- overview of financial statement frameworks
  - ASPE
  - ASNPO
  - IFRS
- overview of financial statements and financial reporting concepts
  - balance sheet, income statement, statement of changes in equity and statement of cash flow
  - recognition and measurement
- corporate taxation issues to address when preparing financial statements
- determining an appropriate basis of accounting for compiling financial statements
- key transition issues to consider when preparing to convert compiled financial statements to ASPE/ASNPO/IFRS

Seminar Material Format

Paperless materials. Print copy option available for $20.

Seminar Leader

Tom Gillespie, CPA, CA

Fee $225 **PD Passport Valid – 1/2 Passport Day** **3.5 Eligible CPD Hours**

IFRS – Review of the Standards

LEVEL Introductory

Prerequisite

Familiarity with *CPA Handbook – Accounting Part I* is useful but not required.

Overview

The objective of this seminar is to provide participants with a solid introduction to Part I - International Financial Reporting Standards (IFRS). The seminar will also cover IFRS standards currently under development at the International Accounting Standards Board (IASB) that are expected to be introduced during the next year.

Course Description

This seminar will cover all of the International Financial Reporting Standards (IFRS) incorporated as part of *CPA Canada Handbook – Accounting – Part I*. The focus is on the IFRS standards that apply to most profit-oriented entities. Participants will also be provided with information on IFRS standards currently under development and the potential impact on financial statements. At the end of this two-day seminar you will be aware of the foundation of IFRS and be able to explain IFRS content. Examples and exercises are incorporated throughout the session for you to identify application issues.

Applicable for

Professionals who work in financial reporting and related areas of publicly accountable enterprises or other enterprises applying IFRS, who are reading financial statements of publicly accountable enterprises, or who wish to be able to explain IFRS standards. Audit committee members who would like to gain an understanding of IFRS may also find this to be a useful seminar.

Content

- overview of IFRS
- financial statement presentation and accounting policies
- property plant and equipment
- investment property
- intangible assets and fair value measurement
- impairment of assets
- revenue, financial instruments, income taxes, liabilities
- strategic investments, separate financial statements
- other IFRS standards
- first-time adoption considerations
- examples and exercises to illustrate application issues

Seminar Material Format

Paperless materials. Print copy option available for $20.

Seminar Leader

Diane McDonald, CPA, CA

Fee $785 **PD Passport Valid - 2 Passport Days** **14 Eligible CPD Hours**

For dates, times and venues – see page 13

NFPO – Review of the Standards

LEVEL Intermediate

Prerequisite

Participants should be familiar with the *CPA Handbook – Accounting Part III*.

Overview

Organizations that operate in the not-for-profit sector are developing new operational models, increasing in complexity and are seeing an increasing need by financial statement users for transparency and comprehensive information. This seminar will discuss the application of accounting standards, with an emphasis on areas where choice exists, that are found in Part III- Accounting Standards for Not-for-Profit Organizations (ASNFPO) and relevant sections of Part II - Accounting Standards for Private Enterprises (ASPE).

Course Description

This course will serve as a review and refresher of the application of ASNFPO and as well as the most common ASPE standard applicable to not-for-profit organizations. Participants will learn what choices are available when setting policies, the impacts on disclosure, and participate in activities and exercises to strengthen the knowledge gained throughout this course.

Applicable for

Professionals at all levels involved in the preparation and review of NFPO financial statements. Those involved in larger NFPOs may prefer to attend the seminar NFPO & Registered Charities – Accounting & Taxation. Government-controlled NFPOs must follow the Public Sector Accounting Handbook, which will not be addressed in this seminar.

Content

- determination of an appropriate accounting framework for an entity
- financial statement concepts
- contributions – revenue recognition
- contributions receivable
- inventories
- employee future benefits
- financial instruments
- long lived assets – including changes upcoming for fiscal year ends beginning on or after January 1, 2019
- reporting controlled and related entities
- allocated expenses
- ongoing projects and potential impact of changes

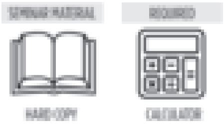
Seminar Material Format

Paperless materials. Print copy option available for $20.

Seminar Leader

Robin Diehl, CPA, CA, CBV

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**



Advanced Financial Statement Analysis

LEVEL Intermediate

Prerequisite

It will be helpful but not mandatory to have an understanding of financial ratio analysis prior to attending this seminar.

Overview

Analyzing financial statements is no easy task. In a world where companies report results using different accounting frameworks, this task is becoming more and more challenging. This seminar will focus on how to analyze financial statements, in particular the lesser known techniques which are becoming more and more important when comparing IFRS and ASPE reporting. It will review the right situations in which to use straightforward financial ratio analysis and will also address adjustments which must be made to statements prior to the use of ratios so that the financial analysis techniques are applied effectively. Finally, it will highlight other measures which must be taken into account to arrive at a detailed assessment of a company's financial health.

Applicable for

Financial professionals who would like to enhance their abilities to read and evaluate the health of financial statements. It will also be of interest to users of financial statements, such as bankers, nonfinancial managers seeking financing, or equity analysts.

Content

- identify challenges involved in comparing companies
- apply common techniques to predict the likelihood of bankruptcy
- describe common adjustments required to financial statements prior to commencing analysis
- identify areas of subjectivity in financial statements and make a critical assessment of the subjectivity
- understand the differences in earnings quality across companies
- understand what makes a strong balance sheet
- improve confidence and competency in analyzing financial statements

Seminar Material Format

Print copy only, no paperless option.

Special Notes

This seminar will be very interactive and hands-on. Participants will analyze real company financial statements and should bring a calculator with them.

Seminar Leader

Karine Benzacar, MBA, FCPA, FCMA, CFA

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

Controllership – Operational Management

LEVEL Intermediate

Prerequisite
None.

Overview
Today's Controller must fulfill four distinct roles to effectively add value to their organizations - steward, operator, catalyst, and strategist roles. This seminar focuses on the first two of these roles in which Controllers find themselves operating on a daily basis, and provides an overall understanding of the skills and tools necessary to effectively fulfill their responsibilities as an operational manager.

Course Description
This course focuses on the steward and operator roles of the controller. The course will give participants the opportunity to reflect on their current role as operational managers and determine which role(s) they need to develop most to add value to their organizations. Specifically, within the operator role, participants will examine essential controller skills and their roles in managing human capital for their organizations. In considering the steward role, participants will examine the financial performance management, information management, and relationship management needed in their organizations. Participants will gain insights, new skills, and many practical tips to improve the overall value they can add to their organizations.

Applicable for
Finance professionals considering a transition to a Controllership position, who are new to the position of Controller, or who are long-time Controllers looking for new tools/ideas or a refresher on operational management areas of the role.

Content
- today's Controller – roles and responsibilities
- Controller essentials and organizational needs
- Controller as HR manager
- Controller as financial performance manager
- Controller as information & relationship manager

Seminar Material Format
Paperless materials. Print copy option available for $20.

Seminar Leader
Rieghardt Van Enter, CPA, CMA

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

Controllership – Strategic Leadership

LEVEL Intermediate

Prerequisite
None.

Overview
Today's Controller must fulfill four distinct roles to effectively add value to their organizations - steward, operator, catalyst, and strategist roles. This seminar focuses on the last two of these roles, for which many controllers may not feel adequately prepared. Too often controllers are caught up in the urgent needs of the day without adequate time to focus on their influence as catalysts and strategists within their organizations. This seminar provides the opportunity to view the controllership role as a leader and a key strategic partner within the organization, providing tips on how to become the leader their organization needs.

Course Description
This course focuses on the catalyst and strategist roles of the controller. Participants will have a chance to reflect on their leadership styles and what leadership role is most needed for their organizations. Part of this role is to understand how emotional intelligence affects them as leaders and how to work with and lead people from across generations.

Participants will also consider how they can add value as strategic thinkers/leaders in their organizations by understanding and expanding their role in this area. Finally, the controller's role as a change/conflict/crisis manager will be considered as this is an area of increasing importance within a changing economic environment.

Applicable for
Finance professionals working towards a Controller position, who are new to the position of Controller, or long-time Controllers looking for new tools/ideas or a refresher on strategic leadership areas of the role.

Content
- Controller as a leader
- Controller as a strategic manager
- Controller as a change, conflict and crisis manager

Seminar Material Format
Paperless materials. Print copy option available for $20.

Seminar Leader
Rieghardt Van Enter, CPA, CMA

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

For dates, times and venues – see page 13

Essential Topics for Controllers

LEVEL Introductory

Prerequisite

None.

Overview

You've done that before, right? You can handle that for us, right? How many times as our career develops as a financial manager do we hear those statements? And how many times is "that" a task that you don't feel all that comfortable performing?

We are inundated in our professional training by opportunities to develop our technical, financial-based skills. However, as we move along in our career, we discover a whole other set of skills that need development. As a financial manager, those soft skills, as well as your technical abilities, will define your career and determine your advancement. This seminar will deal with seven topic areas that you will be expected to be proficient at, or at least have knowledge of, as your career progresses.

Applicable for

Financial professionals whose careers are developing beyond the accounting function towards supervision and management.

Content

Through practical tips and with a maximum one hour per topic, the following essential, career enhancing topics will be de-mystified

- conducting an employment interview
- strategic planning basics
- negotiating skills
- performance evaluations
- managing versus leading
- communication skills
- terminating an employee
- communication exercise

Seminar Material Format

Paperless materials only.

Seminar Leader

Keith Martin, CPA, CA, MBA

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

Financial Management in the Construction Industry

LEVEL Intermediate

Prerequisite

None.

Overview

Construction is Canada's largest single industrial activity in terms of both value and employment. It is an industry where large projects are predominantly controlled by large, national organizations but where the majority of the work is done by small, often family-run contractors. Most industry experts acknowledge the increasing importance of business systems and financial awareness to the success of the construction entity.

As an industry specialization, construction provides a great deal of variety and challenge for the financial professional. From the necessary complexity of the project accounting system to the broad and integrated spectrum of stakeholders, the finance professional should be prepared to confidently address a wide range of topics in order to provide value to their organization.

Applicable for

Financial professionals within the construction industry who may be either new to their position or involved with a growing enterprise, practitioners who wish to attain greater knowledge of the industry in order to better serve their construction clients, and experienced construction financial managers looking for a refresh.

Content

- managing contracts, including interpreting key contractual terms
- developing a better decision-based information system
- job costing
- revenue recognition
- project controls
- change order management
- dealing within the customer's system
- collections
- project review

Seminar Material Format

Paperless materials only.

Seminar Leader

Keith Martin, CPA, CA, MBA

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

Internal Control Refresher for Financial Managers

LEVEL Intermediate

Prerequisite

None.

Overview

When was the last time you looked at your organization's internal controls? This fast-paced seminar provides financial managers with an interesting refresher on control, through videos, case studies and discussion. Content includes what business life would be like without control, the COSO internal control framework, and case studies of controls gone wrong.

You will leave with a deeper understanding of internal control and with some new ideas on innovative approaches to internal control.

Applicable for

CPAs in industry, including financial managers, supervisors and controllers, who want to improve their organization's efficiency and effectiveness, and CPAs who advise clients.

Content

- COSO framework and how to apply it
- internal control, ISO and quality
- controlling the budget process
- spreadsheet controls
- getting buy-in across the organization

Seminar Material Format

Paperless materials. Print copy option available for $20.

Seminar Leader

Jeffrey Sherman, MBA, CIM, FCPA, FCA

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

Interpreting Financial Statements

LEVEL Intermediate

Prerequisite

None.

Overview

Regardless of our career choice, as professional accountants we will be involved in the review and analysis of financial statements. For many, this is a skill that might deteriorate over time: seeing the same numbers month after month; being rushed to report on an annual statement. However, our ability to quickly and confidently get to what is happening through the interpretation of financial results is a critical skill that we need in our toolbox.

Applicable for

Members in public practice, and members in industry involved in managing reporting dashboards or reviewing financial statements.

Content

By actually reviewing financial statements throughout the day, this seminar will strengthen your financial statement analysis capabilities by

- referring briefly to accounting principles as it pertains to financial reporting
- re-familiarizing participants with key reporting issues impacting F/S interpretation
- discussing management of financial information towards desired outcomes
- discussing ratio and trend analysis and its merits/pitfalls
- discussing such concepts as 'context', 'business strategy and intent', 'quality' and other matters usually considered foreign in the preparation of accounting information

There will be hands-on review and interpretation of case studies, as well as discussions

Seminar Material Format

Paperless materials only.

Seminar Leader

Keith Martin, CPA, CA, MBA

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

For dates, times and venues – see page 13

Powerful Financial Analysis

LEVEL Introductory to Intermediate

Prerequisite

None.

Overview

Does part of your role or those you supervise involve financial analysis? In today's fast-paced corporate world, financial analysis can mean many things. This seminar will cover the key facets of a financial analyst's role within an accounting department and help analysts further their career by providing meaningful information to those around them.

Applicable for

Financial analysts within an accounting department or a business unit and those who are responsible for reviewing cost centre reports, monthly reports, budget reports and other variance reports. It is intended for accountants working within companies rather than public practitioners.

Content

- what is financial analysis?
- role of financial analysis in the finance function
- month-end analysis
- quarter-end analysis and year-end analysis
- budget analysis
- cost analysis
- ratio analysis
- overall financial statement analysis
- Altman's Z-score

This course does not discuss the accounting for financial instruments.

Seminar Material Format

Print copy only, no paperless option.

Special Notes

This workshop is highly interactive. Participants will work on exercises in order to learn through hands-on practice. It is highly recommended that participants bring a calculator with them to obtain maximum benefit.

Seminar Leader

Karine Benzacar, MBA, FCPA, FCMA, CFA

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

Practical Tips for Controllers & CFOs

LEVEL Intermediate

Prerequisite

None.

Overview

This seminar provides a wide range of useful tips for use in your work – tips that are not normally found in seminars or textbooks. These are illustrated with interesting anecdotes and examples. Participants will also derive value from sharing experience and practices with each other, and benchmarking your practices with those of your peers.

Applicable for

Accountants in leadership positions, such as Controllers, CFOs and directors of finance, and those moving toward these roles, as well as financial analysts, and those in public practice or consulting, who advise clients.

Content

- great tips on key indicator reporting
- getting the most out of your bank
- cash flow crisis: what to do when it happens
- cost-cutting tips
- M&A: the good, the bad and the ugly
- the fast close
- extra creative thinking for accountants
- auditors & lawyers: working better together
- more useful financial reporting
- straight talk on ethics
- critical steps when you first take a new job

Seminar Material Format

Paperless materials only.

Ethics Hours

This seminar is eligible for 0.75 hour of ethics content.

Seminar Leader

Stephen Priddle, CPA, CA, CMA

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

Practical Tips for Not-for-Profit Financial Leaders

LEVEL Intermediate

Prerequisite
None.

Overview
This seminar covers useful tips for accountants who work for Not-For-Profit organizations. The tips are illustrated through concrete examples derived from real experience. Value will also be derived from the sharing of experiences and practices by the participants. An in-depth, financial reporting improvement case, set in the sector, will give attendees dozens of ideas to improve their financial reporting.

Applicable for
Accountants at any level who work or volunteer in the Not-for-Profit sector, as well as accountants in public practice who advise clients in the Not-For-Profit sector.

Content
- tips on key indicator reporting
- more useful financial reporting
- getting the most out of your bank
- cost-cutting tips
- the fast close
- ethics in a Not-For-Profit context
- system conversion dos and don'ts
- creative thinking for accountants
- auditors & lawyers: minimizing costs
- brainstorming on Not-For-Profit sector challenges
- managing your board
- what to do when you join a new employer in the sector

Seminar Material Format
Paperless materials only.

Ethics Hours
This seminar is eligible for 0.75 hour of ethics content.

Seminar Leader
Stephen Priddle, CPA, CA, CMA

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

Did you know...

CPABC Tax Courses Accredited by the Law Society of BC
Practicing BC lawyers can earn CPD credits by attending tax seminars offered through CPABC PD.

Early Registration & Waitlists
Early registration ensures your space in popular seminars, and will also prevent seminars with lower enrolment from being cancelled. Maximum class sizes vary, and will depend on the type of seminar as well as delivery format. Although we try to accommodate as many registrations as we can, we do not want to compromise the ability of our instructors to teach effectively. If a seminar is already full, you can request to be waitlisted.

Attire at PD Seminars
While there is no official dress code, the majority of attendees arrive in business casual attire. Meeting room temperatures can fluctuate throughout the day, so it is advisable to dress in layers.

Scent-Aware Environment
Some individuals are more sensitive to certain scents and the chemicals used to create those scents. We ask that attendees minimize the use of fragrances as a courtesy to everyone sharing the same learning space.

Lunch and Coffee Service
Lunch is provided only at full-day seminars. Breakfast pastries are provided in the morning (except at free events). Coffee service is provided at all seminars.

Special Dietary Requirements
We will do our best to accommodate attendees who have food allergies, as well as vegetarian or vegan requests, but personal preferences – such as a preference for one type of protein over another – will not be accommodated. Please inform us of your dietary restriction at the time of registration.

For dates, times and venues – see page 13

Finance

Business Valuations - Advanced

LEVEL Advanced

Prerequisite

Business Valuations – Fundamentals, or experience working with business valuations is recommended.

Overview

Building on the concepts of *Business Valuations - Fundamentals*, this seminar gives participants a more detailed insight into some of the more complex issues associated with business valuations. Participants will be introduced to topics such as cost of capital, terminal value quantification, synergy calculations, valuation discounts, and valuing securities other than common shares.

Course Description

This course will provide participants with the ability to challenge and critique specific elements of a business valuation. The basic approaches that are introduced in *Business Valuations – Fundamentals* are dissected in detail such that practitioners will be able to recognize the limitations of various valuation approaches and will be provided with information that will allow them to conduct supplementary analysis for a more robust conclusion of value. The course utilizes a detailed case study that builds upon itself for each module that allows for practical application.

Applicable for

Professionals who have some experience with business valuations who are seeking a deeper understanding of the more complex issues surrounding business valuation. Past attendees include public practice practitioners who have provided some business valuation advice in the past and company executives involved in the purchase or sale of businesses.

Content

- complexities associated with DCF valuation methods, including how to calculate cost of capital (equity and debt), cash flow, and residual value assumptions
- valuing a business using multiples
- valuation and buyer intent - strategic buyers versus financial buyers
- identifying and valuing synergies
- applying valuation discounts, including minority interest, marketability, and key person discounts
- an introduction to valuation issues specific to other securities such as preferred shares and convertible debentures
- a review of different valuation reports in Canada

Seminar Material Format

Paperless materials. Print copy option available for $20.

Seminar Leader

Fred Tang, CPA, CA, CBV

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

Business Valuations - Fundamentals

LEVEL Introductory

Prerequisite

None.

Overview

This full day seminar provides participants a practical insight into business valuation. Participants will learn about and apply valuations tools such as the capitalized cash flow (CCF) approach and the discounted cash flow (DCF) approach to business case studies. The seminar also focuses on business valuation interpretation and the mechanics of the valuation process under an asset approach, income approach, and market approach.

Course Description

This course will provide participants with the basic tools to approach a business valuation. Whether they are assessing the reasonability of a transaction (e.g. a market transaction or a tax initiated process) or providing advice on a potential transaction, this course will provide candidates with the basic knowledge of what to look for, and where to be cautious. It will also provide candidates with a means of triangulating valuation conclusions in order to cross-check or preliminary findings. The course utilizes a detailed case study that builds upon itself for each module that allows for practical application.

Applicable for

Those in industry and practitioners with limited to no valuation experience who are seeking a better understanding of business valuation principles and practices. Past attendees have included Controllers, CFOs, Finance Directors who are starting to see a need to conduct business valuations either for financial/tax reporting or for mergers and acquisitions. Past attendees also included Audit and Tax public practice professionals looking to increase or refresh their specialized knowledge set.

Content

- overview of valuation methodologies, including income approaches, market approaches, and asset approaches, and how to apply them to a real business
- CCF and DCF valuation techniques and application
- calculating maintainable earnings
- determining capitalization and discount rates
- enterprise value versus equity value
- market valuation approaches using equity value and enterprise value multiples

Seminar Material Format

Paperless materials. Print copy option available for $20.

Seminar Leader

Fred Tang, CPA, CA, CBV

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

Business Valuations – Purchase Price Allocation

LEVEL Advanced

Prerequisite

Experience in a role where purchase price allocation is necessary, or previous attendance at Business Valuations – Fundamentals (formerly Business Valuations – Foundations) or Business Valuations – Advanced.

Overview

This seminar will teach participants how to approach a purchase price allocation for financial reporting purposes after a business acquisition or combination closes. 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.

Course Description

The course will provide participants with tools that will allow them to prepare a purchase price allocation with less support from an outsourced advisor than they otherwise might use. It will teach participants how to segment enterprise cash flows based on capital charges and how to allocate them to different intangible assets, as well as how to assess the relative riskiness of different types of intangible assets that result from a business acquisition or combination.

Applicable for

CPAs in public practice providing purchase price allocation support work and/or controllers and CFOs involved in the financial reporting element of business acquisitions.

Content

- overview and process of a purchase price allocation
- review of different intangible assets
- trade-mark valuation techniques
- technology and trade secrets valuation techniques
- non-competition agreement valuation techniques
- work force valuation techniques
- customer relations and order book valuation techniques
- reconciliation of purchase price allocations

Seminar Material Format

Paperless materials. Print copy option available for $20.

Seminar Leader

Fred Tang, CPA, CA, CBV

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

For dates, times and venues – see page 13

Cash and Treasury Management

LEVEL Intermediate

Prerequisite

None.

Overview

Cash management is a core administrative function in any business. This seminar reviews contemporary issues in cash and treasury management including improving cash forecasts, optimizing cash flows, financial risk management and measuring value-at-risk. You will be exposed to state-of-the-art changes in the world of the cash and treasury management, exchange ideas with peers, and leave with fresh insights to improve cash management.

Whether you are new to the field or experienced at cash management, you will leave with new ideas and a fresh perspective.

Applicable for

Financial managers and treasurers, including controllers, analysts, and senior accountants, looking for a refresher or a primer on cash and treasury management, as well as accountants and consultants who advise clients.

Content

- cash management refresher
- budgets, forecasts and projections: direct and indirect cash flows
- oversight, control and risk management
- why you need to know about the Group of 30
- dealing with your banker
- reducing costs for foreign currency transactions
- tips when using derivatives
- managing capital structure
- Blockchain, bitcoin and virtual currencies

Seminar Material Format

Paperless materials. Print copy option available for $20.

Seminar Leader

Jeffrey Sherman, MBA, CIM, FCPA, FCA

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

Corporate Finance

LEVEL Introductory to Intermediate

Prerequisite

None.

Overview

This workshop will focus on providing participants with a working knowledge of the various ways business activity, and mergers and acquisitions (M&A) 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, including and the role of equity capital markets (ECM) and debt capital markets (DCM) in delivering financing solutions. The key issues that a company faces at each stage of an M&A process will also be discussed.

Applicable for

Members in industry and practitioners who need a working knowledge of corporate finance or who need to update their corporate finance knowledge.

Content

- corporate finance jargon (e.g. sell side versus buy side; primary versus secondary capital markets, etc.)
- corporate finance valuation
- best practice M&A analysis
- acquisition finance alternatives
- senior and subordinated debt funding sources
- equity funding sources

This hands-on workshop is built around a series of applied case studies.

Seminar Material Format

Paperless materials. Print copy option available for $20.

Seminar Leaders

Scott Powell, CPA, CA
Kelsey Roste, CBV, BA

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

Due Diligence for Acquisitions

LEVEL Intermediate

Prerequisite

Post-secondary level course in Finance or equivalent knowledge; or basic understanding of, or experience in, mergers & acquisitions.

Overview

This seminar focuses on the core part of a mergers and acquisitions (M&A) project: how to plan, evaluate, analyze and then synthesize the information accumulated. This seminar will deepen participants' understanding of the things to consider, plan and watch for in M & A transactions.

Course Description

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 be able to deepen their understanding of M&A transactions, understand strategic objectives of a due diligence review, plan an acquisition, develop valuation and pricing recommendations, understand critical issues in confidentiality agreements and identify key issues in a prospective acquisition.

Applicable for

Financial managers and accountants who have experience in M&A and would like fresh perspectives, those undertaking due diligence for the first time, and those on the receiving end of a due diligence review.

Content

- M&A process overview
- planning for the transaction
- financial review: quality of earnings and normalized EBITDA, net working capital and net debt
- financial, human resources, legal and operational reviews
- purchase agreement and purchase price adjustments
- integration matters
- common findings and conclusion

Seminar Material Format

Paperless materials. Print copy option available for $20.

Seminar Leaders

Sandra Suh, CPA, CA, CBV
Kevin Zhao

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

Financing Strategies

LEVEL Intermediate

Prerequisite

Participants should have a basic understanding of, or experience in, financing transactions.

Overview

This seminar will provide an in-depth review of the various forms of financing to fund capital projects or acquisitions, or to restructure an existing capital structure. The seminar will dive into the practical details of what capital providers are seeking, issues that can arise, and how companies should prepare themselves to execute a financing transaction. Through real-life examples, identifying common pitfalls, highlighting key elements and case studies, the seminar will put financial executives in a better position to seek financing and negotiate with capital providers.

Course Description

Participants will gain a sense of financing process, terms, and risk associated with multiple types of capital, including term debt and operating lines of credit, asset-based loans, mezzanine finance, private equity, venture capital, public equity markets, and government finance programs. Upon completion, participants should be armed with the tools to either engage in a direct dialogue with various financiers, or better interact with an intermediary / agent working on their behalf.

Applicable for

Controllers, chief financial officers, chief executive officers and other financial executives who provide input into, or take the lead, in undertaking a financing transaction within their own enterprises.

Content

- overview of financing strategy and capital markets
- current state of the capital markets, including benchmarks and rules of thumb regarding realistic financing parameters
- basic capital structure elements
- discussion of various forms of financing, including government financing, operating lines and term debt, mezzanine and subordinated debt, real estate financing, private equity, venture capital and public equity and convertible debentures
- understanding cost of capital
- cost of capital and investment decisions
- financing process and negotiating strategies

Seminar Material Format

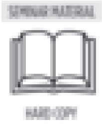
Paperless materials. Print copy option available for $20.

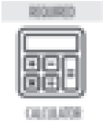
Seminar Leaders

Ian Wanke, CPA, CA, CFA, CBV
Chelsea Jiang

Fee $450 **PD Passport Valid - 1 Passport Day** **7 CPD Hour**

For dates, times and venues – see page 13





Treasury & Finance for Accountants

LEVEL Introductory

Prerequisite

None.

Overview

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. Alternatively, accountants may be uninvolved in the business decisions related to hedging but perform the accounting related to such tasks. However, performing the accounting requires a basic understanding of the business transactions behind financial instruments.

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.

Applicable for

Accountants who would like to broaden their knowledge in the area of finance and understand the business aspects of financial instruments.

Content

- financial instruments - the business aspect
- hedging - key principles
- over-the-counter (OTC) vs exchanges
- financial instruments - inner working and details
- futures, forwards, swaps, and options
- alternative strategies
- protective puts
- covered calls
- collars
- money spreads
- swap options
- foreign exchange

This course does not discuss the accounting for financial instruments.

Seminar Material Format

Print copy only, no paperless option.

Special Notes

This workshop is a highly interactive session. Participants will perform calculations individually while working through concrete exercises and examples, and therefore should bring a calculator, preferably one with time value of money functions.

Seminar Leader

Karine Benzacar, MBA, FCPA, FCMA, CFA

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

Information & Business Technology

2020 Technology for CPAs – Don't Get Left Behind

LEVEL Introductory

Prerequisite

None.

Overview

In this fast-paced, update-style course, you will 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. You will also learn about significant trends in information technology and how to take advantage of the opportunities presented by these trends. Examples include the latest Excel features, working with PDF files, and security and privacy issues. Additionally, you will learn how to improve the overall performance of your IT investment, thereby increasing your return on investment. Throughout this program, you will 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, both now and in the future.

Applicable for

Accounting and financial professionals seeking to improve their knowledge of technology and the return on their investment in technology. If you are not an information technology (IT) expert, but need a technology update to maintain and improve your skills so that you can serve your companies and/or clients more efficiently and effectively, then this course is for you!

Content

- key hardware and software enhancements and updates that are relevant to accountants, including operating systems, desktop productivity suites, accounting software, and document management systems
- key features in Microsoft Office applications, including accountant-centric features in Excel, Word, and Outlook
- key features found in Adobe Acrobat for working with PDFs, including commenting, reorganizing PDFs, securing PDFs, and creating and working with PDF forms
- key security and privacy issues facing accountants, including practical tools and techniques for mitigating risk, such as data encryption, password management, biometrics, and portals

Seminar Material Format

Paperless materials only.

Special Notes

This is NOT a hands-on seminar.

Seminar Leader to be drawn from

Ward Blatch, CPA, CA
David Millette, CPA, CA

Fee $450 **PD Passport Valid – 1 Passport Day** **7 Eligible CPD Hours**

For dates, times and venues – see page 14

2020 Technology Update

LEVEL Intermediate

Prerequisite

Fundamental understanding of basic technology concepts.

Overview

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? If you answered "yes" to any of these questions, then make plans now to invest half a day in this fast-paced and highly informative seminar that is sure to ramp up your return on technology investment. The technology tools available to businesses have never been better, but many are not taking full advantage of these tools. This course helps professionals, at all levels, understand the major trends in hardware, software, and services and how to utilize these tools to meet organizational objectives both efficiently and effectively. More than just a seminar on the latest computers, you will learn about the full spectrum of practical technology available to you and your team and how to implement these tools for maximum impact.

Applicable for

Business professionals who are interested in how technology affects them and seek an update of relevant technology trends, tools, and techniques.

Content

- key features of Windows 10 and situations where upgrading might be advantageous
- developments in mobile technologies and developing an optimal mobile strategy
- security issues facing business professionals and options for mitigating risk
- key features of Office 2016 and determining an optimal time to upgrade
- major trends in hardware, including desktops, laptops, servers, tablets, storage, and printing
- strategies for successful Cloud implementations, including accounting and tax, document management, workflow, and data storage and synchronization applications
- virtualization and how it potentially changes the technology infrastructure in your office

Seminar Material Format

Paperless materials only.

Special Notes

This is not a hands-on seminar.

Seminar Leader

Ward Blatch, CPA, CA

Fee $225 | **PD Passport Valid – 1/2 Passport Day** | **3.5 Eligible CPD Hours**

Advanced Excel Data Magic – Managing, Analyzing, and Reporting

(formerly Advanced Data Magic in Excel)

LEVEL Advanced

Prerequisite

Experienced Excel user.

Overview

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 how to advance your reporting processes and minimize your dependence on formulas, then this is the one class you cannot afford to miss. In this session, you will learn about the importance of creating Data Models to facilitate your financial reporting processes and how you can use Power Pivot to assist in summarizing your data quickly and easily into compelling and interactive statements. You will also learn how to use Excel's Power Query feature to both link and transform data from external data sources – such as your accounting or ERP system – into Excel so that you use this data in your reports.

Applicable for

CPAs and other financial and business professionals who are seeking quicker and more accurate ways to prepare financial reports and summaries using Excel 2016 and newer.

Content

- define the term "Data Model" and identify the steps for creating Data Models in Excel
- identify the steps necessary to link data from external data sources into Excel using Power Query
- create transformations in Power Query to facilitate simpler and more timely reporting
- list the key benefits associated with using Power Pivot to manage your Data Models
- create PivotTables and PivotCharts to summarize your financial data into useful reports and statements

Seminar Material Format

Paperless materials only.

Special Notes

This is NOT a hands-on seminar, but participants will have access to demonstration files. The seminar will focus on features found in Excel 2016 and newer for Windows.

Seminar Leader

Marion Williams

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

Advanced Excel

LEVEL Advanced

Prerequisite

Experienced Excel user.

Overview

The content of this course draws from over twenty-five years of experience in delivering Excel training to accountants and other business professionals and throughout the program, relevant, real-world examples reinforce the major topics presented. You do not want to miss this opportunity to become more efficient and proficient in Microsoft Office Excel, the accounting and financial professional's tool of choice. This course covers advanced Excel topics found in Excel 2007 through Excel 2016.

Applicable for

Business professionals who work with Excel 2010 or newer and want to extend their knowledge with advanced features and functions. For experienced Excel users seeking to elevate your skills, this seminar will provide critical advanced Excel skills in six key areas: collaborating with other users and securing workbooks; using tables to analyze and report data; integrating and manipulating data from external sources; creating and auditing complex formulas; advanced data analysis tools; and visualization techniques to analyze and communicate information.

Content

- best techniques to secure sensitive information in Excel workbooks and collaborate with other users to improve accuracy and efficiency
- tables and their advanced features, such as dynamic data ranges, structured reference formulas, and relate multiple tables together into a Data Model
- import and link data into Excel from external sources – including text, Access, and SQL Server – and use advanced tools to manipulate the data to meet specific needs
- advanced functions, such as SUMPRODUCT, VLOOKUP, HLOOKUP, MATCH, INDEX, NETWORKDAYS, RAND, RANDBETWEEN, NPV, IRR, XNPV, and XIRR to create and audit complex formulas
- analyze worksheet data using techniques such as Data Tables, Subtotals, Slicers, Filters, and PivotTables
- techniques used to create, manipulate, and customize charts for analyzing and communicating information

Seminar Material Format

Paperless materials only.

Special Notes

This is NOT a hands-on seminar, but participants will have access to demonstration files. The seminar will focus on Excel for Windows, but many of the features can be found in Excel for Mac.

Seminar Leader

Karen Granville, Hons. BMath

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

Advanced Excel Reporting: Best Practices, Tools, and Techniques

LEVEL Advanced

Prerequisite

Strong working knowledge of Excel 2010 or newer.

Overview

If you need to build advanced Excel reports, including reports where the source data resides in your accounting software or another database, then this seminar should be on your list! You will learn how to use Open Database Connectivity (ODBC) and Online Analytic Processing (OLAP) to connect Excel to external data sources, such as your accounting software database, to extract data for reporting and analysis. You will also learn how to incorporate PivotTables into your reporting routines, including how to add calculations to your PivotTables, group PivotTable data into fiscal reporting periods, and filter your PivotTables using Slicers. You will also learn best practices for presenting compelling and captivating Excel-based reports and charts, and how to use two Excel add-ins – BizNet's Excel Business Information Suite and Microsoft's Power Pivot – to streamline and automate many of the manual processes associated with building Excel-based reports.

Applicable for

Accounting and financial professionals who use Excel for reporting and want to reduce the risk of errors, simplify reporting processes, and improve the quality of reports.

Content

- link and import data from external databases – including multi-table databases – into Excel
- use Tables and PivotTables to create accurate financial reports and analyses
- list and apply Excel shortcuts for formatting financial reports
- implement Excel templates to improve reporting productivity
- identify opportunities to work with third-party tools to streamline reporting in Excel

Seminar Material Format

Paperless materials only.

Special Notes

This is NOT a hands-on seminar, but participants will have access to demonstration files. The seminar will focus on Excel for Windows, but many of the features can be found in Excel for Mac.

Seminar Leader

Marion Williams

Fee $225 **PD Passport Valid – 1/2 Passport Day** **3.5 Eligible CPD Hours**

For dates, times and venues – see page 14

An End to Manual Effort in Excel: The Power Query Effect

LEVEL Intermediate

Prerequisite

Strong working knowledge of Excel's basic functions as well as working knowledge of pivot tables.

Overview

The sad reality is that not all data is stored in nicely curated databases and often - even when it is - the data analyst doesn't have access. Instead we have to piece together data provided in text files, Excel files, web pages and even the body of emails to build the business intelligence solutions we need. Until now this has been a painful process with a great deal of cut and paste effort, and updates have been tedious and error prone. That stops today.

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.

Applicable for

Anyone who needs to pull data into Excel, clean it up and/or consolidate it. Please note that you must bring your own laptop, and ensure you have all the prerequisites listed above before attending the seminar.

Content

- import data from text files and web pages
- append data from one table to another
- merge two data sets together
- import all files in a folder in one shot
- un-pivot tables with ease
- create dashboards from email in minutes

Seminar Material Format

Paperless materials only.

Special Notes

This is a hands-on seminar. Please bring a laptop with one of the programs listed: Excel 2010 and the free Power Query download; Excel 2013 and the free Power Query download; Excel 2016 (Power Query is built in to the product)

Seminar Leader

Ken Puls, FCPA, FCMA

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

Blockchain Essentials for CPAs

LEVEL Intermediate

Prerequisite

Foundations of Blockchain (see page 51) is the prerequisite seminar as this is Part 2 of a two-part course.

Overview

This session aims to help participants comprehend what blockchain could mean for the CPA profession. It first addresses the near-term implications by illuminating how blockchain impacts business processes, and how to approach risk identification and mitigation in a blockchain environment. It then discusses the longer-term questions that blockchain raises for the profession.

The session incorporates a mix of lecture-style presentations and active participation and discussion. Participants are introduced to a number of real-world use cases, and will analyze in detail how risks can be identified and mitigated. The session concludes with a discussion of how the CPA profession could be impacted by blockchain and other disruptive technologies over the longer-term.

Applicable for

This session is applicable for members both in public practice and in industry whose clients and organizations may be implementing or using blockchain technologies, now or in the future, and will look to you for advice or assistance in appropriately addressing the business, financial, and/or audit risks.

Content

- introduce risk and trust in a blockchain environment
- review and analysis of real-world case studies to bring these concepts to life
- discuss the impact of blockchain on the CPA profession

Seminar Material Format

Paperless materials only.

Seminar Leaders

Tejinder Basi
Mark Moran, CPA, CA
Chris Rowell, Ph.D.

Fee $225 **PD Passport Valid – 1/2 Passport Day** **3.5 Eligible CPD Hours**

Budgeting and Forecasting Tools and Techniques

LEVEL Intermediate

Prerequisite

Fundamental knowledge of Microsoft Office Excel 2010 or newer.

Overview

Learn how to achieve a greater return on your budgeting and forecasting activities by taking advantage of various tools and techniques available in today's market.

In addition to learning about how to utilize Excel more effectively for budgeting and forecasting activities, you will also learn about other tools, such as Budget Maestro, PROPHIX, and Host Analytics, and how reducing your dependency on Excel can lead to better results. Additionally, you will learn how to account for risk and uncertainty in your budgeting and forecasting models and why doing so is a best practice for more meaningful budgets and forecasts.

Applicable for

Business professionals involved in budgeting and forecasting activities.

Content

- processes for obtaining budget data and collaborating with others when using Excel including Shared and Merged Workbooks, Excel's Audit Trail, controlling and validating data input
- Excel techniques for interacting with the accounting system, such as Office Data Connections, Open Database Connectivity, importing text files, and linking Internet-based data into budgeting and forecasting models
- situations in which various Excel techniques are appropriately implemented, such as Data Tables for sensitivity analysis, Excel's Goal Seek feature, Solver to maximize scarce resources, Scenario Manager, Regression Analysis, and Monte Carlo simulations
- Excel functions in capital budgeting situations, and methods by which Excel computes depreciation
- compare and contrast Excel with other applications used for budgeting and forecasting activities and situations in which other solutions should be used to reduce the dependency on Excel

Seminar Material Format

Paperless materials only.

Special Notes

This is NOT a hands-on seminar, but participants will have access to demonstration files.

Seminar Leader

Karen Granville, Hons. BMath

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

Building a Financial Model of a Company

LEVEL Intermediate

Prerequisite

Fundamental knowledge of accounting and capability working with Excel.

Overview

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. It will cover 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.

Applicable for

Those who want to design and create a dynamic financial model of a company that adheres to the highest industry standards. **Note that this seminar is not designed for macOS-based Excel.**

Content

- design and structure a financial model
  - design and layout a financial model clearly and logically
  - discuss the need for a model to serve as a marketing tool
  - create clearly defined inputs and assumptions sections
  - connect strings of data to create assumptions and footnotes
- build powerful scenarios and financial statements
  - use switches to create effective scenarios and value drivers
  - forecast and build-up a company's revenues and expenses
  - design and incorporate a company's income statement, balance sheet and cash flow statement
- incorporate all relevant schedules
  - construct all necessary schedules, including: depreciation/CAPEX schedule; working capital schedule; income tax schedule; debt and interest schedule; shareholders' equity schedule
  - use Lookup functions within the model to effectively extract information
  - properly incorporate Senior Term Debt with an amortizing repayment schedule
  - create a robust Bank Operating Line (or Revolving Credit Facility)
  - design and incorporate a cash sweep for a company's Bank Operating Line
  - balance the company's balance sheet

Seminar Material Format

Paperless materials only.

Special Notes

This is a hands-on seminar. Please bring a laptop with Windows-based Excel (any version) installed. This seminar is not designed for macOS-based Excel.

Seminar Leader

The Marquee Group

Fee $450 | **PD Passport Valid – 1 Passport Day** | **7 Eligible CPD Hours**

For dates, times and venues – see page 14

Business Intelligence, Featuring MIcrosoft's Power BI Tools

LEVEL Advanced

Prerequisite

Basic understanding of computer operations and terminology, including Microsoft Office Excel.

Overview

In today's business climate, Business Intelligence (BI) is perhaps the hottest topic in most professional circles. Increasingly, organizations of all sizes are seeking to take advantage of the data that is available to them to identify previously undiscovered insights and gain competitive advantages thought to be out-of-reach just a few short years ago. A growing array of tools – ranging from Excel add-ins to dedicated solutions such as Power BI – now allow you to leverage your existing knowledge and skills to create powerful, interactive dashboards and analyses unthinkable until recently.

In this program, you will learn how to implement "do it yourself business intelligence" using a variety of techniques and tools. You will learn how to work with some of the advanced data query and summarization features in Excel to create Excel-based dashboards and then you will learn how to leverage that knowledge to build even more powerful BI objects using Microsoft's Power BI tools. If gaining greater insights into your data to make better decisions is of interest to you, then join us for a fast-paced look at how you can take advantage of these fantastic tools.

Applicable for

Business professionals seeking to develop and implement BI solutions.

Content

- create Excel-based BI dashboards
- the potential shortcomings of BI solutions based wholly on Excel
- various Excel add-ins that might useful in BI applications
- differentiate between the BI opportunities in Excel and Power BI
- create and distribute dashboards using Power BI

Seminar Material Format

Paperless materials only.

Special Notes

This is NOT a hands-on seminar, but participants will have access to demonstration files. Please download and install Power BI Desktop before class from https://k2e.fyi/PowerBIDownload. If you are using Excel 2010 and 2013 you will require the installation of the add-on Power Query from Microsoft https://k2e.fyi/PowerQueryDownload.

Seminar Leader

Marion Williams

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

Creating Vibrant Dashboards

LEVEL Intermediate to Advanced

Prerequisite

Fundamental knowledge of Excel.

Overview

How many times, after presenting the statements you've worked so hard on, do your audiences' eyes glaze over? It's awful, but it highlights something really important … often the way we present our work isn't ideal.

In this seminar we'll look at different ways to present our information, telling a story using effective data visualization tools in Excel. We'll examine charts, graphs, conditional formatting and other techniques, pulling the results into a dynamic and engaging dashboard; a one-stop report that gives us an overview of the key metrics we want to see for a hypothetical business need.

Applicable for

Accountants and other professionals who need to be able to share information visually and engage their audience.

Content

This seminar will focus on strategies and tools that can be used to summarize key business metrics for presentation, including

- best practices rules for creating effective charts
- building basic charts (line and bar)
- modifying chart elements
- creating combination charts
- building interactive charts
- advanced chart types
- conditional formatting tools and tricks
- custom number formatting techniques
- putting them all together in a dashboard

Seminar Material Format

Paperless materials only.

Special Notes

This is a hands-on seminar. Please bring a laptop with Excel 2007 or higher.

Seminar Leader

Ken Puls, FCPA, FCMA

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

Data Analysis & Communication with Excel

LEVEL Intermediate to Advanced

Prerequisite

Fundamental knowledge of Excel. Note that this seminar is not designed for macOS-based Excel.

Overview

This course provides practical tips and hands-on application to a variety of data management, charting and formatting skills in an Excel environment. Participants will build a series of charts that complete a sample dashboard that provides summary analysis and detailed displays of the underlying data. A variety of chart types will be explored. Automating titles, creating informative labels and text boxes and learning best practices for dashboard design and construction will also be covered.

Applicable for

Accountants who are interested in enhancing their skills to use Excel to communicate using charts and organize data.

Content

Communicate with the optimal chart types and formatting

- determine the optimal chart for presenting types of data
- learn design ideas for simple and elegant charts
- learn complex chart structures such as bubble charts and multiple chart styles in a single chart
- use slicers and other tools to rapidly create interactive and flexible analysis

Data organization and manipulation best practices

- organize and manage data effectively for chart and table creation
- employ sophisticated automation techniques to manage data
- use pivot tables to build powerful data analysis capabilities and link them to charts
- pivot table formatting techniques to enable their use in reports and dashboards

Powerful formatting and automation techniques

- use formulas to automate titles and labels with special techniques for format control
- use conditional formatting for unique data display and highlighting techniques
- eliminate footnotes and excess comments by using text functions to automatically create powerful descriptions in your charts and tables
- chart formatting tips to simplify chart creation and to build elegant and easily maintained visual reports

Seminar Material Format

Paperless materials only.

Special Notes

This is a hands-on seminar. Please bring a laptop with Windows-based Excel (any version) installed.

Seminar Leader

The Marquee Group

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

Data Analytics and the Future of Finance

LEVEL Intermediate

Prerequisite

None.

Overview

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. The final section will guide participants to develop an action plan to improve both their personal and organizational capability in analytics.

This course will provide some fundamental ideas and techniques that can be immediately applied at work. Participants will be able to assess how prepared they and their organizations are for the future role of finance and how to proactively plan and develop their own path to being analytics professionals.

Applicable for

Finance professionals who want to improve their skills in analytics with quick win techniques and tools to follow up with and/or are looking at proactively managing their skills and relevance for the future; and finance staff who want to be part of advanced analytics projects working with business users and technical specialists.

Content

By attending this seminar, participants will learn how to

- follow up on key analytics techniques and tools to improve the quality of reporting/decision support
- critically assess how prepared they and their organization are for the future role of finance and the importance of data analytics, and decide what role(s) they want to take in the future
- develop a personal action plan to address these opportunities/gaps

Seminar Material Format

Paperless materials only.

Special Notes

This is not a hands-on seminar, it will demonstrate and discuss a variety of examples, tools, and software such as Excel, Power BI, RPA tools, coding (Julia) with suggestions on techniques and ideas for follow up after the course.

Seminar Leader

Simon Lindley

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

For dates, times and venues – see page 14

Emerging Technologies for Accountants, Including Blockchain and Cryptocurrencies

LEVEL Intermediate

Prerequisite

Basic knowledge of technology strategy and standards.

Overview

Unlike technologies we use every day, many of the currently 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.

Attend this course, and learn the basics of blockchain, cryptocurrencies, big data, artificial intelligence, and machine learning, as well as some of the uses, benefits, risks, and threats posed to legacy businesses by these innovative yet disruptive platforms.

Applicable for

Practitioners and business executives who need to know more about emerging technologies, including blockchain and cryptocurrencies.

Content

- define blockchain, artificial intelligence, cryptocurrency, big data, and machine learning
- identify the major similarities and differences between big data, artificial intelligence, and machine learning
- list examples of potential use cases for each of the technologies discussed in this session and identify how these technologies differ from current practices

Seminar Material Format

Paperless materials only.

Special Notes

This is NOT a hands-on seminar.

Seminar Leader

Ward Blatch, CPA, CA

Fee $225 **PD Passport Valid – 1/2 Passport Day** **3.5 Eligible CPD Hours**

Excel: Specific Skills for Budgeting, Planning & Forecasting

LEVEL Intermediate

Prerequisite

Fundamental knowledge of Excel 2007 or newer.

Overview

If you need help to improve budgeting, planning and forecasting processes in your business, then this hands-on workshop will help you apply specific skills in Excel to do just that. You will work with the many Excel features such as data consolidation for budgets, securing workbooks, forecasting and charting techniques for presentation of budgets.

Applicable for

CPAs, students, and accounting and business professionals who would like to gain more practical experience in Excel reporting and using statistical data. Those interested in financial modeling in Excel may wish to take Excel Financial Models and Analysis instead.

Content

- best practices for designing budget templates
- Excel features to secure worksheets for sharing and collaboration
- 'what-if' analysis tools for forecasting and planning
- consolidate multiple budgets with PivotTables
- chart techniques for budget presentation
- consolidate data from multiple workbooks or worksheets
- simplify the budgeting process with Macros
- workbook sharing and collaboration with Office 365
- protect your worksheets

Seminar Material Format

Paperless materials only.

Special Notes

This is a hands-on seminar. Attendees are required to bring their own laptop with Excel 2007 or higher installed.

Seminar Leader

Richard Jang, BCom, DipIT, MCP, CPA, CGA

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

Excel: The Next Level of Skills

LEVEL Advanced

Prerequisite

Intermediate knowledge of and capability working with Excel 2007 or newer.

Overview

It is time to take your Excel skills to the next level! Discover the best features and functions in Excel to make your accounting and finance tasks easier, faster and more accurate. This hands-on workshop will provide you with the skills for creating and editing macros, conditional formatting and data validation. Learn how to bring data into Excel from databases and use PivotTables for creating presentations in Word and/or PowerPoint. This seminar will cover many advanced features of Excel to make your work easier and increase the sophistication of your data analysis and reporting.

Applicable for

CPAs, students, and accounting and business professionals who want to learn advanced Excel features and functions, and their application to business.

Content

- create Excel Tables and PivotTables for analysis and reporting
- extract and manipulate data from data sets for PivotTables
- 'what-if' analysis using Data Tables, Scenario Manager and Goal Seek
- record and edit Macros with the Visual Basic Editor
- integrate Excel with other Office programs such as MS-Word
- consolidate data from multiple workbooks or worksheets
- workbook sharing and collaboration with Office 365

Seminar Material Format

Paperless materials only.

Special Notes

This is a hands-on seminar. Attendees are required to bring their own laptop with Excel 2007 or higher installed.

Seminar Leader

Richard Jang, BCom, DipIT, MCP, CPA, CGA

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

Excel Boot Camp

LEVEL Intermediate

Prerequisite

Fundamental knowledge of Excel 2010 or newer.

Overview

By using accounting-centric examples, developed for accountants by accountants, this intensive two-day program will take you through Excel from A to Z and show you how to elevate your use of Excel to the next level. In addition to long-standing features in Excel such as lookup functions, the Camera tool, and formatting options, this boot camp will highlight the number of recent improvements to Excel including additions to the function library, tables, a vastly improved charting engine, and an overhaul of PivotTable functionality. You will also learn various techniques for enhancing, not only your efficiency, but also your effectiveness, when working with Excel by taking advantage of a wide variety of "power features" to assist you in creating accurate spreadsheets in a fraction of the time previously required.

Applicable for

Excel users and potential Excel users who want to increase their efficiency and effectiveness with Excel. The focus of this session is on Excel for Windows; however, many of the Excel features discussed are also available in Excel for Mac.

Content

- various tips, tricks, and techniques to address issues such as formatting, AutoCorrect, handling dates and times, and selecting cells with special characteristics
- Excel's formula-building tools
- how and when Excel's Table feature should be used
- complex formulas, including those containing arrays and SUMIFS, VLOOKUP, HLOOKUP, INDEX, and MATCH functions
- various techniques for securing Excel workbooks
- charts that captivate audiences and communicate effectively
- six components of PivotTables and create PivotTables, including PivotTables that perform user-defined calculations
- the Camera function in creating custom reports
- the Macro Recorder tool in creating simple, yet very useful, macros that you can put to work right away

Seminar Material Format

Paperless materials only.

Special Notes

This is a hands-on seminar, and participants will have access to demonstration files. The seminar focuses on Excel for Windows, but many of the features can be found in Excel for Mac.

Seminar Leader

Karen Granville, Hons. BMath

Fee $785 **PD Passport Valid - 2 Passport Days** **14 Eligible CPD Hours**

For dates, times and venues – see page 14

Excel Charting and Visualizations

LEVEL Intermediate

Prerequisite

Fundamental understanding of creating charts in Microsoft Office applications.

Overview

Charts and graphs are nothing new. However, many professionals struggle with building effective visualizations. If that statement describes you, take part in this session to improve your skills when building charts and other visualizations in Excel. As a result of doing so, you will be able to create visualizations that will enhance your communication skills.

This is much more than just a seminar on fundamental charts. Instead, in this session you will learn how to create advanced charts that are interactive, dynamic, and aesthetically pleasing – three qualities that will help to ensure that your readers and audience will understand the data you are presenting. If you are looking to improve your communication skills, this seminar is a must for you.

Applicable for

CPAs and other accounting, financial, and business professionals who want to learn how to create more effective charts and visualizations in Excel.

Content

- identify the types of visualizations that should be used to communicate specific messages
- list the steps to creating effective visualizations in Excel and other Microsoft Office applications
- identify options for creating interactive visualizations
- utilize Sparklines and Conditional Formatting to enhance visualizations in Excel
- identify options for linking Excel-based data and visualizations into Word and PowerPoint

Seminar Material Format

Paperless materials only.

Special Notes

This is NOT a hands-on seminar, but participants will have access to demonstration files. The seminar will focus on Excel for Windows, but many of the features can be found in Excel for Mac.

Seminar Leader

Ward Blatch, CPA, CA

Fee $225 **PD Passport Valid – 1/2 Passport Day** **3.5 Eligible CPD Hours**

Excel Financial Models and Analysis

LEVEL Advanced

Prerequisite

Intermediate knowledge of Excel 2007 or newer.

Overview

Financial models are mathematical models where variables are linked together to perform calculations. The calculations are analyzed, and based on the information retrieved, can be used to make business decisions. Excel provides an outstanding toolset for creating such financial models. 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 BI features in Excel for reporting and presentation.

Applicable for

CPAs, students, accounting and business professionals looking to improve their skills using Excel for financial modeling, reporting and analysis. Those interested specifically in budgeting and forecasting may wish to take *Excel - Specific Skills for Budgeting, Planning and Forecasting* instead.

Content

- techniques for building flexible models in Excel
- audit tools to ensure model integrity
- make decisions under uncertainty using 'What-if' tools
- apply Excel's Scenario and Solver features to models
- use data tables and charts for analysis
- apply Macros to modeling and analysis
- build Executive Dashboards with Excel's BI Tools

Seminar Material Format

Paperless materials only.

Special Notes

This is a hands-on seminar. Attendees are required to bring their own laptop with Excel 2007 or higher installed.

Seminar Leader

Richard Jang, BCom, DipIT, MCP, CPA, CGA

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

Excel Tips, Tricks and Techniques for Accountants

LEVEL Intermediate

Prerequisite

Fundamental knowledge of Microsoft Office Excel 2010 or newer.

Overview

This highly acclaimed seminar contains hundreds of tips, tricks, and techniques to improve your productivity and accuracy. It has six major areas of topical coverage: productivity tips and tricks, formatting essentials, customizing Excel, formula-building essentials, three-dimensional workbooks, and printing essentials.

Applicable for

Accounting and financial professionals who want to learn how to use Excel more efficiently and effectively.

Content

- identify situations in which various Excel features can increase productivity and apply each of these techniques in context, such as Freeze Panes, Split Windows, selecting cells with special characteristics, AutoCorrect, the Office Clipboard, and Paste Special
- implement tools and techniques for formatting data in Excel, including multiline column headings, the Accounting Format, custom date and number formats, and Conditional Formatting
- customize Excel's user environment, including the Ribbon and the Quick Access Toolbar, adjust Excel's Options, and create and use Templates to increase efficiency and productivity
- utilize various formula building tools to create formulas more efficiently and create various types of formulas, including formulas to manipulate text and dates, formulas containing VLOOKUP and HLOOKUP functions, formulas that contain conditional calculations, and formulas that contain circular references
- link data across multiple Excel worksheets and workbooks, update and manage links, and create sum-through formulas and rolling reports
- implement procedures for producing Excel-based reports, including adjusting print settings, using the Camera feature to create report forms, and working with Custom Views to automate print settings

Seminar Material Format

Paperless materials only.

Special Notes

This is NOT a hands-on seminar, but participants will have access to demonstration files. The seminar will focus on Excel for Windows, but many of the features can be found in Excel for Mac.

Seminar Leader to be drawn from

Karen Granville, Hons. BMath
David Millette, CPA, CA

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

Financial Modeling – DCF Valuation Analysis

LEVEL Intermediate

Prerequisite

Fundamental knowledge of accounting and capability working with Excel.

Overview

This seminar will focus on the steps required to properly value a company using the Discounted Cash Flow (DCF) methodology. Participants will learn to recognize and avoid the five most common errors finance professionals make when creating DCF analysis. They will learn a methodology for creating and analyzing a DCF financial model using Excel as a tool for calculation and analysis, and gain a more advanced level of knowledge on Excel tools that will help them in performing analytics.

Applicable for

Those who are involved in valuing companies or assets, or professionals who are required to audit the valuation analysis prepared by others.

Content

- various valuation methodologies and the appropriateness of using a DCF methodology to value a business
- calculate a company's levered or unlevered free cash flow
- build a terminal year in the model to create a steady-state perpetual cash flow
- review critical terminal year assumptions including Capex, working capital, margins and income taxes
- calculate the tax impact of unlevering cash flows
- two common styles to create a DCF analysis
- calculate the company's cost of capital and choose an appropriate weighted average cost of capital (WACC) range
- discount the cash flows in the forecast period and ensure that the cash flows are discounted to the correct period
- review the distinction between using Excel's NPV and XNPV functions
- various methodologies to value the terminal period
- common discounting errors and the magnitude of discounting the cash flows to the wrong time period
- powerful Excel tools to sensitize the outputs
- appropriate credit ratios that impact a company's covenants
- "flags" to warn the user when covenant has been tripped
- format output tables to highlight specific results

Seminar Material Format

Paperless materials only.

Special Notes

This is a hands-on seminar. Please bring a laptop with Excel (any version) installed.

Seminar Leader

The Marquee Group

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

For dates, times and venues – see page 14

Foundations of Blockchain

LEVEL Intermediate

Prerequisite

None.

Overview

This is Part 1 of a two-part course. See page 43 for Part 2, *Blockchain Essentials for CPAs*. Many organizations are implementing blockchain solutions to bring new kinds of value and efficiencies to their business, though we are only beginning to scratch the surface of its potential. This session provides 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 in the future. The goal is to empower participants with a foundational knowledge of blockchain, and the capacity to identify and understand use cases and opportunities.

The session will demystify and define key terms related to blockchain, and show how its applications reach far beyond cryptocurrencies to impact a wide range of businesses and industries. Using engaging examples, we provide a clear explanation of the core features of blockchain and how they can combine to create business benefits. We then outline how blockchain is currently being applied to enhance transparency, security, and bring new efficiencies to business processes. We introduce a framework for blockchain governance, and illuminate how blockchain can redistribute trust in business networks. We conclude with a discussion of blockchain's longer-term disruptive potential.

Applicable for

This session is applicable for members both in public practice and in industry with a general interest in blockchain and why it could matter for them. Executives considering whether blockchain is relevant to their organization from a strategic standpoint, as well as practitioners seeking a foundational understanding that they can build upon, should find this session especially valuable.

Content

- demystify what blockchain is, how it works, and why this matters
- gain a foundational understanding of blockchain technology that enables you to critically evaluate the blockchain-based applications you encounter, and to identify opportunities for the application of blockchain in your organization or industry
- gain a basic understanding of how blockchain can enable the redistribution of trust in business networks, and what this means for technological, information, and network governance

Seminar Material Format

Paperless materials only.

Seminar Leaders

Tejinder Basi
Mark Moran, CPA, CA
Chris Rowell, Ph.D.

Fee $225 | **PD Passport Valid – 1/2 Passport Day** | **3.5 Eligible CPD Hours**

Google is Not Enough: The Best Search Tools You Aren't Using (But Should!)

LEVEL Introductory

Prerequisite

A basic understanding of how to connect to the internet on computing and mobile devices, and navigate online.

Overview

The seminar will provide a concise overview of non-Google search tools and how they can be used by accountants to scan the 99% of the web that Google can't "see." You'll discover a whole new universe of public records, corporate databases, decision engines, people tracking tools, e-marketplaces, user-generated content and much more that are largely off the Google "radar." Even if you think you're web savvy, you are guaranteed to learn new search strategies, techniques and tools that will take you to the next level of online intelligence gathering.

Applicable for

Accounting professionals who wants to diversify and deepen their online discovery skills, explore Google alternatives and discover online business and accounting information not typically listed in Google search results.

Content

- Google myths and blind spots internet searchers must know
- predictive search
- decision engines
- free business magazine and newsletter subscriptions
- internet archives
- web alerts services
- social media search
- information moshpits
- people search; market, business & accounting research
- eMarketplaces
- events
- invisible web
- verticals
- wikis
- question and answer
- online classifieds
- general search tools

Seminar Material Format

Paperless materials only.

Seminar Leader

Garrett Wasny, MA, CMC, CITP/FITP

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

Hands-on Techniques to Create Effective Financial Visuals in Excel and PowerPoint

LEVEL Intermediate

Prerequisite

This is not a basic level Excel or PowerPoint course. You need to come already being familiar with the programs, have intermediate level skills in general, and be familiar with creating graphs in Excel.

Overview

Too many financial presentations rely on huge spreadsheets or paragraphs of text copied onto slides. Audiences say these overloaded slides confuse them and executives don't take action when they are unsure of the message. This seminar will help you create visuals – clear, effective graphs in Excel or PowerPoint; diagrams that show comparison of value in new ways; and time-based diagrams - that clearly communicate the message behind the numbers.

Applicable for

Professionals who use Excel and PowerPoint to communicate financial information to others.

Content

- how to select the right visual for your message
- advanced formatting and labelling of charts
- advanced charts such as: showing comparison to a standard, indexing to compare data
- measured in different units, conditional formatting data bars, overlapping columns, and waterfall graphs
- techniques to incorporate Excel cells or graphs into PowerPoint
- creating graphs in PowerPoint and why you may want to do that instead of Excel
- creating process/sequence and timeline visuals in PowerPoint
- focusing attention in a graph by using a callout

Seminar Material Format

Paperless materials only.

Special Notes

This is a hands-on seminar with demonstrations using Office 2016 for Windows. Please bring a laptop with Office 2013 or higher for Windows, or Office 2016 or later for Mac. Bring your laptop, power cord, and external mouse if you prefer that to a trackpad.

Seminar Leader

Dave Paradi

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

How to Present Financial Data Effectively Using PowerPoint

LEVEL Intermediate

Prerequisite

None.

Overview

Accountants often use PowerPoint to present financial data to peers, executives, suppliers, and others. It is critical that others understand the impact of the financial analysis so that decisions can be made and the bottom line positively impacted. Audiences want financial professionals to tell them the story behind the numbers, not overwhelm them with spreadsheets. Unfortunately, too often the barrage of numbers is overwhelming to the audience and they leave confused.

This session will show participants a different approach to financial presentations - make it about the message, not the numbers. Participants will learn how to create a structured message with focused content and effective visuals. Many examples from real presentations will be used to demonstrate the ideas.

Applicable for

Professionals who use PowerPoint to communicate financial information to others.

Content

- avoid the mistakes audiences say annoys them about financial presentations
- plan your message with a structure that makes it easy to understand
- reduce information overload
- make wise decisions on slide design elements within the boundaries of your corporate template
- use a decision based approach to selecting the best visual for each message
- understand the advantages & disadvantages of different ways to use data from Excel in PowerPoint

Seminar Material Format

Paperless materials only.

Seminar Leader

Dave Paradi

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

For dates, times and venues – see page 14

Introduction to Excel Macros

LEVEL Introductory

Prerequisite

None.

Overview

You have used Excel for years and Lotus prior to that. During this time, you have said repeatedly, “One day, I’ll learn how to write macros.” Well, that time has arrived because this four-hour program will introduce you to the wide world of macros and Visual Basic for Applications (VBA) in Excel.

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. You will also learn the basics of VBA, including many necessary elements to write macros that can make you and your team more effective and productive with Excel.

Applicable for

Business professionals seeking to extend Excel’s functionality with simple, yet highly-effective, macros.

Content

- create a macro in Excel using the Macro Recorder tool
- manage the fundamental elements of macros in Excel, including accessing macro functionality, naming macros, shortcut keys, storing and deleting macros, absolute vs. relative cell references in macros, and macro security
- the usefulness and four key limitations of the Macro Recorder; modify Excel’s Quick Access Toolbar and the Ribbon to provide shortcuts to macros
- list the nine key elements of macros written using Visual Basic for Applications and utilize the Visual Basic Editor; manage macros through copy/paste and delete processes
- create variables in macros and identify the purpose of branching and conditional logic routines such as IF/THEN/ELSE, DO/WHILE, and CAS

Seminar Material Format

Paperless materials only.

Special Notes

This is NOT a hands-on seminar, but participants will have access to demonstration files. The seminar will focus on Excel for Windows, but many of the features can be found in Excel for Mac.

Seminar Leader

Marion Williams

Fee $225 **PD Passport Valid – 1/2 Passport Day** **3.5 Eligible CPD Hours**

Intro-Mediate Excel Techniques

LEVEL Intermediate

Prerequisite

Working experience with Excel.

Overview

Excel is by far one of the most prolific and most versatile programs installed on desktops today. It’s everywhere, and touches most business positions in some way. Yet the reality is that by far the vast majority of Excel users are self-taught. We struggle through the program, learning what we need in order to accomplish our tasks and then… stop learning? The truth is that once we’ve worked out a method to finish our work, we usually call it a day.

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.

Applicable for

Users who are self-taught in Excel and who feel that they may have gaps in their Excel knowledge, especially around the topic outline areas.

Content

- formula & function review: essential math, logic, and text functions, including useful functions you may not have heard of
- mastering VLOOKUP: a deep dive into understanding how VLOOKUP REALLY works, common causes of the dreaded #N/A error, and how to guard against them
- Excel tables – the new way to store data
- instant insights from conditional formatting
- PivotTables: beautifully simple, blazingly fast, and unbelievably useful - from creation to useful formatting tricks

Seminar Material Format

Paperless materials only.

Special Notes

This is a hands-on seminar. Please bring a laptop with Excel 2007 or higher installed.

Seminar Leader

Ken Puls, FCPA, FCMA

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

Modeling Project Finance: Real Estate

LEVEL Intermediate

Prerequisite

Fundamental knowledge of, and capability working with Excel.

Overview

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 one-day "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.

Applicable for

Public practitioners with a client base in the development space or those working in finance/accounting roles for companies or government entities undertaking project-based assignments.

Content

- design and structure of an Excel-based project finance model
- understand how project financing (both debt and equity) flow in and out depending on stage of development
- modeling cash flows for a real estate development project
- building in "triggers" and sensitivities to understand a project's exposure to key drivers
- building in ownership and financial structures (debt & equity)

Seminar Material Format

Paperless materials only.

Special Notes

This is a hands-on seminar. Please bring a laptop with Excel (any version) installed. You will have access to download Excel templates which you will need to load onto your laptop.

Seminar Leaders

Scott Powell, CPA, CA
Kelsey Roste, CBV, BA

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

Power Pivot – Business Intelligence at the Heart of Excel

LEVEL Introductory to Intermediate

Prerequisite

Attendees should be comfortable using pivot tables, and advanced formulas in Excel such as index – match, sumproduct and nested formulas.

Overview

Power Pivot is an ingenious product that brings Business Intelligence capabilities into the heart of Microsoft Excel. Most data analysis relies on relational data, whether it's tables of orders, products and customers; or GL accounts, transactions, and dates. And yet we continue to rely on manual lookups and memory intensive Excel files to analyze this data across our chosen segments.

With Power Pivot, the world of big and relational data is suddenly accessible, with metrics and calculations that span across multiple tables and relationships, thus eliminating the need for intensive lookups. Utilising the same DAX (Data Analysis Expressions) as Power BI, Power Pivot users can create powerful models that join relational data, allowing you to create sophisticated dashboards in Excel, that otherwise wouldn't be possible.

Applicable for

Regular and proficient users of Microsoft Excel - those analyzing big data sets and making regular use of pivot tables and lookups.

Content

- understand lookups as a simple form of relationship between two tables
- create relationships between related data tables
- create calculated columns and metrics which help explain the data
- utilize Power Pivot Time Intelligence functions
- create Power Pivot tables, pulling data from different sources
- create slicers to slice and dice data

Seminar Material Format

Paperless materials only.

Special Notes

This is a hands-on seminar. Please bring a laptop with both the Power Query and Power Pivot add-ins installed and activated. Power Pivot is generally available with all version of Excel back to, and including, Excel 2013. A detailed guide on installation can be found here: https://support.office.com/en-us/article/Where-is-Power-Pivot-aa64e217-4b6e-410b-8337-20b87e1c2a4b

Seminar Leaders

Scott Powell, CPA, CA
Sebastian Taylor

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

For dates, times and venues – see page 14

Power Query – Automated, Consistent Data, Time after Time

LEVEL Introductory to Intermediate

Prerequisite

Attendees should be comfortable using pivot tables, and advanced formulas in Excel such as index – match, sumproduct and nested formulas.

Overview

Modern data science and analysis techniques allow us to do incredible things with our data. But we often forget and underestimate the amount of time we spend sourcing and preparing our data for use in our models. The phrase garbage in, garbage out reminds us of the importance of clean, reliable, consistent data coming into our models. The problem is, we spend hours collating data, searching for errors, cleaning it up, performing look ups, copy pasting and then repeating those steps the following week or month.

Power Query is a revolutionary product, embedded in Microsoft Excel, and targeted at eliminating all those manual steps from our data sourcing. Power Query will save you hours of time, and allow you to focus on the value add of analysis.

Applicable for

Regular and proficient users of Microsoft Excel - those handling and manipulating data on a regular basis, and especially those who are repeating these manipulations on a regular basis.

Content

- normalization of data - what does good data look like?
- importing data - from files, tables or folders
- filtering - reducing data size to what's necessary
- transforming data - changing types, format, and creating new data
- joining data - eliminate lookups forever
- dealing with errors - eliminate costly errors from your data

Seminar Material Format

Paperless materials only.

Special Notes

This is a hands-on seminar. Please bring a laptop with the Power Query add-in installed and activated. The add-in goes by various names, depending on which version of Excel is being used: Power Query, Get & Transform and Data are possible names. An explanation on how to install and activate can be found here: https://www.excelcampus.com/install-power-query/

Seminar Leaders

Scott Powell, CPA, CA
Sebastian Taylor

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

Rapid Dashboard Development with Power BI Desktop

LEVEL Intermediate

Prerequisite

Basic knowledge of Excel. No prior experience with Power BI or Power BI desktop is required.

Overview

For years, Excel has been the business intelligence tool of choice for accountants and business analysts around the world. In 2015, however, Microsoft released a free software package that has become the hottest software commodity in the business intelligence landscape; Power BI Desktop. Power BI Desktop allows rapid collection and cleaning of data and creates a relational database of the data on the fly. But the best part is that once this work is done it provides access to compelling dashboards that are attractive, interactive and best of all incredibly easy to both build and refresh.

Applicable for

Accountants and data professionals who are responsible for building business intelligence reports.

Content

- sourcing data from a variety of sources
- data visualization and transformations
- creating data model relationships
- introduction to DAX measures
- working with interactive visuals
- sharing dashboard solutions personal vs. enterprise

Seminar Material Format

Paperless materials only.

Special Notes

This is a hands-on seminar. Please bring a laptop running the free version of Power BI desktop. As Power BI desktop is updated monthly with new features, we recommend downloading the most recent version available at powerbi.microsoft.com.

Seminar Leader

Ken Puls, FCPA, FCMA

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

Securing Your Data – Practical Tools for Protecting Information

LEVEL Intermediate

Prerequisite
Basic understanding of computer operations.

Overview
Security is not optional and yesterday's security techniques are not working to minimize today's security threats. Therefore, now is the time for you to tune up what you know about protecting sensitive data. In this program, you will learn about the latest tools and techniques for securing your data, including encryption, virus protection, secure communications, electronic signatures, secure authentication, and more. You will also learn how to implement a very practical, five-step approach to securing your PC and the types of questions you should be asking of your staff to ensure server-based information remains protected.

Security failures, such as a breach of client or customer data, are costly – they can even drive your company out of business. What are the security tools you need and how do you use them to secure your sensitive data and systems? Can you afford to take the risk of attempting to manage today's threats by using yesterday's techniques? Learn how you can implement viable and practical solutions to mitigating today's security threats.

Applicable for
Business professionals seeking to secure sensitive data.

Content
- assess the relevant security risks in your organization
- identify specific tools and techniques to protect sensitive data
- five specific steps to improve PC security
- implement security procedures to improve organizational security

Seminar Material Format
Paperless materials only.

Special Notes
This is not a hands-on seminar.

Seminar Leader
Ward Blatch, CPA, CA

Fee $225 | **PD Passport Valid – 1/2 Passport Day** | **3.5 Eligible CPD Hours**

Testing and Auditing Excel Workbooks

LEVEL Intermediate

Prerequisite
Fundamental understanding of Microsoft Office Excel 2010 and newer.

Overview
Excel errors continue to plague organizations of all sizes and as spreadsheets become ever-more common, the effects of these errors will continue to impact virtually every Excel user and those who rely on Excel-based data and analyses. Fortunately, that need not be the case because many options exist to prevent, identify, and correct spreadsheet errors before they adversely affect reports and decision-making processes.

In this session you will learn how to apply best practices to reduce the error rate in workbooks that you and others on your team create and edit. Equally important, you will learn how to take advantage of add-ins for Excel that can programmatically scan and audit your spreadsheets to identify potentially disastrous errors while there is still time to correct them. You do not want to miss this opportunity to learn how tools such as PerfectXL, ClusterSeven, and ActiveData can help you and your team to identify and correct potentially disastrous spreadsheet errors.

Applicable for
Business professionals seeking to reduce errors and improve accuracy and efficiency when working with Microsoft Office Excel. The course focuses on Excel for Windows, but many of the features can be found in Excel for Mac.

Content
- list common causes of spreadsheet errors and the potential impact of these errors
- identify best practices to reduce the number of errors in Excel Workbooks
- implement various Excel add-ins to programmaticaly identify spreadsheet errors

Seminar Material Format
Paperless materials only.

Special Notes
This is NOT a hands-on seminar, but participants will have access to demonstration files. The seminar will focus on Excel for Windows, but many of the features can be found in Excel for Mac.

Seminar Leader
Ward Blatch, CPA, CA

Fee $225 | **PD Passport Valid – 1/2 Passport Day** | **3.5 Eligible CPD Hours**

For dates, times and venues – see page 14

Top PDF Features You Should Know

LEVEL Intermediate

Prerequisite

Fundamental knowledge of basic PDF operations

Overview

Stop struggling with PDFs! Using Adobe Acrobat, and other PDF tools, provides access to a number of features, which make working with these common files a breeze. In this course, you will learn how to use tools and features, such as PDF forms, redaction, converting PDFs to Word and Excel files, electronic signatures, creating and applying tick marks, building indices and catalogs, portfolios, and securing PDF documents, to their fullest in order to work more effectively and efficiently with PDF documents.

The popularity and usefulness of PDFs increases daily, but most PDF users have not learned how to manipulate PDF documents effectively. Accordingly, they struggle and strain with these very common files. You do not need to let this be the case. Join us in this very timely program where you will learn the top features necessary to optimize your work with PDF documents.

Applicable for

Business professionals who are seeking to become more efficient and effective when working with PDF documents.

Content

- reorganize and manipulate PDF documents – including applying bookmarks – to meet specific needs
- create and distribute PDF forms and automate the process of collecting and summarizing form response data
- markup and edit PDF documents and apply tick marks
- secure PDF documents and facilitate electronic approvals and signatures
- convert PDF documents to Word and Excel files

Seminar Material Format

Paperless materials only.

Special Notes

This is NOT a hands-on seminar, but participants will have access to demonstration files. The seminar uses Adobe Acrobat Pro DC, a trial is available at https://k2e.fyi/AcrobatTrial.

Seminar Leader

David Millette, CPA, CA

Fee $225 **PD Passport Valid – 1/2 Passport Day** **3.5 Eligible CPD Hours**

VBA Fundamentals: From Zero to Hero

LEVEL Advanced

Prerequisite

You should be an intermediate to advanced Excel user, who has experience writing a variety of formulas and using many of Excel's built-in features. This is not an introductory level Excel course.

Overview

Under the hood of Excel, beyond the standard formulas and user interface tools that you see on a daily basis, lurks Visual Basic for Applications (VBA), an incredibly powerful magic that many would only dream of harnessing. It is the magic of automation and can save you from ever suffering a repetitive task again. Those who have heard of VBA, yet not stepped onto the path of greater learning, often assume that it is too difficult to learn. Once they finally dedicate themselves to taking that journey, they are amazed to learn that this is not the case.

This is a 2-day VBA course that takes someone from no coding experience to understanding VBA fundamentals. The course will teach the concepts the way an accountant understands them, hitting on the hurdles and pitfalls that creep up along the way, and with examples that are accounting focused. The focus of the seminar is on program writing, not on the use of the application.

Applicable for

Accountants and data professionals who work with data on a daily basis and are responsible for preparing reports. This course has been designed for intermediate to advanced Excel users who have no previous programming experience. Attendees will need to bring a laptop running a Windows version of Excel.

Content

- defining macros
- macro security settings
- understanding VBA structure
- optimizing the Visual Basic editing environment
- writing, editing and recording macros
- reading and editing recorded code
- debugging macros
- key coding constructs (with blocks, loops, and variables)
- conditional logic (if tests and cases)
- error handling
- code encapsulation
- creating user defined functions

Seminar Material Format

Paperless materials only.

Special Notes

This is a hands-on course. Participants should bring a laptop running a Windows version of Excel.

Seminar Leader

Ken Puls, FCPA, FCMA

Fee $785 **PD Passport Valid - 2 Passport Days** **14 Eligible CPD Hours**

Visual Analytics and Dashboards (i2VSA)

LEVEL Intermediate

Prerequisite

None.

Overview

More and more data, more reports and more detail - but how much is actionable information? Good visualization and dashboarding is a process that starts with a structured approach to surfacing what users really need, identifying the most relevant data and using the most appropriate visual techniques, structures and 'stories' to support understanding, insights and focus for action. This course will take participants through this process, giving them the skills to create effective visual reports and dashboards in Excel, or to apply the principles and process of design to other visualization software/ tools.

Visualization is increasingly sought to make information more accessible and to provide new insights – but learning to create charts in Excel/ other software is only part of the solution. This course tackles the critical challenge – to produce "actionable information" that helps people gain new insights and make decisions. It is a highly interactive and practical workshop, with multiple case studies and group exercises.

Applicable for

Business and finance professionals who want to improve the quality of reports and dashboards; apply effective visual techniques that generate insights and produce actionable information for better decision making; and create dashboards that highlight critical metrics, tell stories with data and cut-through the problems of data overload and lack of clarity.

Content

- produce actionable information reports and dashboards – using a 6-step process from identifying users' needs, choice of data and metrics, to design, user sign off and development
- use appropriate charting techniques based on recognition of 5 common categories of information problems
- designing effective visuals based on understanding of how visual processing works and why and how to avoid common problems
- tell stories with data, structure and build dashboards that provide a "visual executive summary" and act as a focus for action
- start using simple regression and predictive models in Excel

Seminar Material Format

Paperless materials only.

Special Notes

This is a hands-on course. A laptop on Day 1 is optional, but participants must bring a laptop with Microsoft Excel 2010 or later for Day 2. An external mouse is also strongly recommended.

Seminar Leader

Simon Lindley

Fee $785 | **PD Passport Valid - 2 Passport Day** | **14 Eligible CPD Hours**

Don't miss...

Information Technology Insights 2020

June 18-19
Vancouver Convention Centre West

See page 107 for more information on this PD Nexus day.

People Management & Personal Development

Communication & Negotiation

Problem-Solving & Decision Making

Professional & Ethical Behaviour

Self-Management

Teamwork & Leadership

Public Practice Management

Strategy, Governance, Risk & Human Resource

Strategic Management Certificate Program

Advanced Strategic Management Certificate Program

Becoming a Skilled Negotiator

LEVEL Introductory

Prerequisite

None.

Overview

A key skill for accountants to succeed in business today is the ability to effectively negotiate with internal and external parties. The basis for successful business relationships has long been the product of negotiation rather than power. To achieve personal business objectives, it is necessary to be able to win support from colleagues and clients and to negotiate effective outcomes. The goal of this interactive course is to 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.

Applicable for

Individuals responsible for negotiating with internal clients and external parties, and taking the perspective of establishing and maintaining successful long-term relationships.

Content

In this session you will learn

- best practices on effective commercial negotiations including the benefits of a win-win approach
- methods for dealing with a partner who is not seeking a win-win outcome
- how to establish outcomes including understanding options and appreciating different interests at hand
- preparations for negotiations including the identification of stakeholders and their respective interests
- about the role of values in negotiation
- successful behaviours in support of negotiations
- how to handle manipulation, and manage the personal agendas that can jeopardize successful negotiation

Seminar Material Format

Paperless materials. Print copy option available for $20.

Seminar Leader

Helen Wale, MA, CPHR, CECX

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

Clear Thinking/Clear Speaking

LEVEL Introductory to Intermediate

Prerequisite

None.

Overview

In this course you will learn to speak clearly and succinctly, in a way that helps your listeners stay focused and value your remarks, even when you have little or no time to prepare. This course will help you learn to respond to questions, speak up at meetings and even feel more comfortable in social situations. While speaking is the primary focus, you will also gain tips to help with tasks like phone messaging, email, and report writing.

Applicable for

Individuals at any phase in their career wishing to enhance their communication skills, especially their ease in speaking, and confidence in different (and possibly challenging) situations.

Content

This is a day filled with exercises and activities related to impromptu speaking. You'll be on your feet talking to small groups and offering other speakers your honest feedback. While some theory is presented, this course is focused on practical application.

In this session, you will learn to

- tune in to the real feelings and concerns of your audience
- connect your responses to their interests, needs and concerns
- organize your comments
- use timing to increase the impact of your message
- manage difficult and awkward questions - yet sustain and build goodwill
- stay calm under fire - how to manage audience hostility
- incorporate examples to win their attention at an emotional level
- practice for continual improvement
- never again have to think, "I wish I'd said ..."

Seminar Material Format

Paperless materials only.

Seminar Leader

Margaret Hope, M.ED

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

For dates, times and venues – see page 15

Communicating Effectively Under Pressure

LEVEL General

Prerequisite

None.

Overview

We have all felt pressured, at one time or another, to respond to a difficult question, opinion, or suggestion. It may be that we require more time to reflect about what is being asked, or we struggle with the question of "should I say what I really think?" Or maybe we are unsure of what we think or what we want.

In this course, we will explore situations where you feel pressure and learn some practical strategies for communicating under pressure.

Applicable for

Anyone who has ever felt pressured to respond and struggled with it.

Content

- exploring circumstances where pressure occurs
- managing the conflict within
- saying no
- understanding own style
- understanding stress response
- speaking for own needs
- common pitfalls
- tips and tools for communicating under pressure

Seminar Material Format

Paperless materials only.

Seminar Leader

Pam Penner

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

Conflict: Changing Viewpoints & Influencing Behaviors

LEVEL Introductory to Intermediate

Prerequisite

None.

Overview

Conflict is a daily reality for all of us. In personal and business dealings, we invariably encounter disagreements, disputes and visceral conflicts. While most seek to avoid or shy away from conflict, properly handled, it is a wonderful opportunity for change, growth and mutual profit improvement. When mismanaged, it's a disruptive, debilitating and destructive force that leads to escalating emotions and takes a devastating toll on relationships. If you're uncomfortable with conflict, suppress your true feelings or are overly accepting of the obnoxious behaviour of others, this course is for you.

Applicable for

Anyone who is uncomfortable dealing with interpersonal conflict.

Content

In this fast-paced, highly practical course, discover how to

- recognize the positive potential of conflict
- turn conflict into opportunities for problem solving and behavior modification
- deal effectively with confrontation, problem behaviour, intimidation, criticism, emotional blackmail and gamesmanship
- get off the defensive and prevent time-consuming disagreements
- discover your "hot buttons" and develop self-control
- deal with miserable, insensitive and obnoxious "difficult" people
- increase your personal effectiveness, credibility and capacity to influence others

Seminar Material Format

Paperless materials only.

Seminar Leader

Dr. Jim Murray

Fee $475 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

Principles of Negotiation

LEVEL General

Prerequisite

None.

Overview

In it is simplest form, negotiation is the process necessary when we are unable to achieve our objectives single-handedly. Better understanding the drivers, tools and techniques, as well as our own individual strengths and weaknesses, can tremendously impact our effectiveness in achieving outcomes that ensure individual and organizational success in both the short and long term.

Applicable for

Anyone interested in improving their negotiation skills.

Content

- gain an understanding of your motivational style and how it impacts your views, approach and results within a negotiation
- consider the role and impact of cultural and societal norms that drive both process and results
- explore the myths and traps associated with various styles of negotiations
- examine, apply and practice specific techniques, tools and strategies to increase your negotiation effectiveness

Seminar Material Format

Paperless materials only.

Seminar Leader

Tammy Towill, FCPA, FCMA

Fee $225 **PD Passport Valid – 1/2 Passport Day** **3.5 Eligible CPD Hours**

Tools for Communicating with Difficult People

LEVEL General

Prerequisite

None.

Overview

This course explores the reasons we find certain individuals and situations difficult to deal with. Is it because a person is emotional, resistant, or behaving badly? What are our reactions to a difficult person or situation, and what are the reasons we react the way we do? Are our reactions productive? What can we do differently to ensure a productive conversation that enables change in a way that is respectful and inclusive?

This course will help you deal with the reactions of others and to self-manage your own. It will provide you with techniques for assertively, respectfully and accurately describing behaviours you find difficult, and for requesting a change. It will help you prepare for, and to conduct, difficult conversations.

Applicable for

Anyone who would like to, or needs to, address problematic behaviour inside or outside of the workplace.

Content

- defining and exploring behavior
- dealing with resistance and minimization
- defusing emotion
- anger arousal and impact on cognitive functioning
- self-management tools
- communication skills
- limit setting and disengaging
- exploring assumptions - intention - effect

Seminar Material Format

Paperless materials only.

Seminar Leader

Pam Penner

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

For dates, times and venues – see page 15

SEMINAR MATERIAL PAPERLESS OPTIONAL LAPTOP

Top Talks: How to Talk to Decision-Makers

LEVEL Intermediate

Prerequisite

Some familiarity with the core elements of public speaking.

Overview

Research indicates that high level decision-makers prefer speakers to behave in some fairly specific ways. This program is about developing the language, delivery skills, visual supports and process for delivering to those high-level audiences.

You'll learn what high level listeners and decision-makers need and want from you. You'll learn to craft your remarks and prepare yourself for the hot-seat.

Applicable for

Managers and leaders who address high level decision-makers such as the Executive team or a Board of Directors.

Content

In this session, you will learn

- how Top Talks are different from other business communication opportunities
- how to design presentations with decision-making in mind
- delivery skills appropriate to succinct, effective presentation
- how to create (or direct the creation of) appropriate visual support
- how to use rehearsal to build confidence
- when to stop talking (listening & responding)
- how to manage challenges (tough questions, direct challenges, rude or abrasive responses from the audience)

Seminar Material Format

Paperless materials only.

Seminar Leader

Margaret Hope, M.Ed

Fee $225 **PD Passport Valid – 1/2 Passport Day** **3.5 Eligible CPD Hours**

SEMINAR MATERIAL PAPERLESS OPTIONAL LAPTOP

You're Speaking – But Are You Connecting?

LEVEL General

Prerequisite

None.

Overview

Yes, there is a better way, and an easier way, to get the results you want when you speak to others. In this half-day program, you'll learn to make minor changes to your personal speaking style yet see and feel a major improvement with each audience you address.

You'll leave with ideas and skills that will help you get results using less time. This session will also help you reduce the symptoms of anxiety. You'll enjoy speaking more and your audiences will appreciate hearing from you.

Applicable for

No matter whether you are a seasoned speaker, facing your first major presentation, or somewhere in between, this seminar will make an enormous difference to your speaking skills and self-confidence.

Content

- know how to use your preparation time for best results
- know how to inject your personality into your presentations
- know how to make each of your listeners feel you are really talking to them
- know how to add humour and excitement when your audience most needs it
- know how to handle difficult speaking situations and what to do when things go wrong

Seminar Material Format

Paperless materials only.

Seminar Leader

Margaret Hope, M.Ed

Fee $225 **PD Passport Valid – 1/2 Passport Day** **3.5 Eligible CPD Hours**

A Coach Approach to Problem Solving

LEVEL Intermediate to Advanced

Prerequisite

None.

Overview

Conflict management may not be considered a core competency in many organizations, but it should! Each day we interact with clients, managers, service providers, employees and peers. Our effectiveness is determined by our ability to negotiate and collaborate with others. Problem-solving and managing conflict in this process seems to be an essential ingredient.

So why are some leaders more effective at conflict management than others? They use a Coach Approach! Coaching uses inquiry skills to help people be more aware of their emotions, thinking and behaviours. Coaching is a way of structuring a conversation in a way that helps others take responsibility for their feelings and behaviours, consider other meaningful possibilities, strengthen important relationships and rebuild trust. Effective conflict and resolution results require a coaching and mediation approach.

Applicable for

Anyone wanting to improve their ability to embrace typical challenges and conflict in the workplace.

Content

In this session, you will learn how to
- design a “problem solving coaching” conversation
- identify the positive opportunities that conflict creates
- address workplace conflict more confidently
- understand a powerful “constructive feedback” model

Seminar Material Format

Paperless materials only.

Seminar Leader

Lesley-Ann Marriott, CEC, PCC

Fee $450 | **PD Passport Valid – 1 Passport Day** | **7 Eligible CPD Hours**

Achieving Results Through Collaborative Projects

LEVEL Intermediate

Prerequisite

Knowledge of the concepts behind the SDI (Strength Deployment Inventory) and the Relationship Awareness Theory are useful but not required.

Overview

This highly interactive course focuses on the value of intentionally designing a culture that improves interpersonal communication, and the importance of collaborative project planning as a vehicle for building teams and delivering value in organizations. Participants will engage in hands-on interactive activity to fully experience the principles of this philosophy.

Everyone can identify the difference between their best and worst collaborative experiences, but most are surprised that this difference has little to do with traditional project management instruction. Here, we bring the human element back into what is critical for collaboration and project success.

By the end of this course, participants will be able to
- differentiate, through reflection and discussion, the key distinctions between their best and their most challenging project experiences
- combine concepts of the Relationship Awareness Theory with personal needs to create an intentional set of norms of behaviour that supports an effective team culture
- collaborate with others to develop a comprehensive project schedule that supports early reconciliation of diverse perspectives
- extend concepts of diversity from the Relationship Awareness Theory to apply to appreciation of diversity in all forms that exist in teams

Applicable for

Anyone involved in collaborative work and the delivery of projects, regardless of their role in the organization.

Content

- introduction: today’s team challenges, opportunities to harness creativity and innovation
- intentional team development: taking charge of creating a mature team culture
- changing diversity from a team challenge to a team advantage
- collaboration to deliver value: leveraging the structure of projects to align teams
- collaborative planning exercise: working together as a team to develop project schedules
- building positive feedback into daily team workflow

Seminar Material Format

Paperless materials only.

Seminar Leader

Jim Brosseau

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

For dates, times and venues – see page 15

Project Management: Tips & Traps

LEVEL Intermediate

Prerequisite

None.

Overview

The objective of this seminar is to organize a project for success in a realistic and effective manner.

Participants will gain the skills and knowledge to

- understand the value of project management for your organization
- organize projects effectively
- identify practical problems confronting a project
- learn PM best practices and what works for you

Applicable for

Senior managers seeking a greater understanding of project management, identifying improvement.

Content

Project Management (PM) is fundamental to an organization's success; essentially, it is the organization of resources to meet time-specific outcomes. We will provide an overview of PM, explain why a company should use it, and describe who should use it. Then we will run through the necessary steps to implement a project management approach. We will address the components of a good plan: how to organize for success; identifying potential barriers; and, studying PM best practices and how to use them. In the wrap-up, we will include some advice on practical problems associated with PM.

Seminar Material Format

Paperless materials only.

Seminar Leader

Bruce Acton, B.Sc., M.B.A., FCMC

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

A Threats and Safeguards Approach to Ethical Decision Making

LEVEL Introductory

Prerequisite

None.

Overview

As CPAs, each of us has a responsibility to live up to our obligations under the *CPABC Code of Professional Conduct*. In this workshop, we'll explore situations in our professional roles that involve ethical challenges and examine how these can pose threats to our compliance with the Fundamental Principles. We'll also determine how these threats can be mitigated, through examining the relevant Rules and applicable Guidance in the *CPA Code*, and determining relevant safeguards.

Regardless of your specific role as a CPA, your employer and/or clients have high expectations of your ability to address ethical challenges, such as those that are driven by: changing social norms; complexity of the work environment; technology and misinformation; inherent bias and the impact on objectivity; pressure from clients and employers; inducements, including bribery and corruption; climate change; and money laundering risks. In this session, you will be guided through a systematic process to: collaboratively explore the issue, evaluate the situation in the context of the Fundamental Principles, and use the *CPA Code* to plan how to manage and address challenges through appropriate safeguards.

Applicable for

CPAs looking to fulfill ethics requirements through collaborative discussions and applying the *CPA Code of Professional Conduct*, and seeking to enhance their ability to effectively manage ethics-related situations in accordance with professional responsibilities.

Content

- a refresher of the Fundamental Principles in the *CPA Code of Professional Conduct*
- the value of, and expectations for, ethical leadership
- identifying threats to compliance with the Fundamental Principles
- recognizing situations where threats are encountered
- evaluating the level of threats and determining appropriate safeguards to mitigate threats
- implementation strategies to follow through

Seminar Material Format

Paperless materials only.

Special Note

Participants should bring a current copy of the *CPA Code* (hardcopy or electronic) with them.

Ethics Hours

This seminar is eligible for 4 hours of ethics content.

Seminar Leader to be drawn from

Laura Friedrich, FCPA, FCGA
Roger Merkosky, CPA, CA
Mark Ostry, CPA, CGA
Wendy Royle, CPA, CA

Fee $225 **PD Passport Valid – 1/2 Passport Day** **4 Eligible CPD Hours**

Becoming an Ethical Leader

LEVEL Introductory

Prerequisite

None.

Overview

This workshop will give participants insight into becoming ethical leaders, and how that translates into becoming more effective and respected leaders. It will explore the critical role ethical leadership plays in creating the ethical climate in organizations. This seminar will first identify the toxic side of leadership. By illuminating unethical leadership traits, we are more able to correct those behaviours and promote ethical leadership. It will then focus on the positive aspects of ethical leadership, and how to make and follow through on ethical leadership decisions. We will discuss elements of character and how they influence ethical decision making. Topics covered during the session will be reinforced through interactive group discussions that are based on real life challenges facing the ethical leader.

By the end of this seminar, participants should be able to

- understand unethical leadership practices
- become aware of negative motivators
- improve moral decision making
- acquire ethical knowledge
- resist situational pressures
- understand the role of reason and emotion in ethical decision making
- make better ethical decisions as a leader

Applicable for

Those new to leadership or looking to improve the ethical climate in their organization. Owners of companies and executive management will also find value in having their management teams attend.

Content

- unethical leadership practices
- common drivers of unethical behavior
- moral imagination and moral disengagement
- assessing ethical awareness
- moral decision making
- resisting negative situational pressures
- make and follow through on ethical leadership decisions
- elements of character and how they influence ethical decision making
- systematic approach to ethical leadership

Seminar Material Format

Paperless materials only.

Ethics Hours

This seminar is eligible for 4 hours of ethics content.

Seminar Leader

Jeff Price, CPA, CGA

Fee $225 **PD Passport Valid – 1/2 Passport Day** **4 Eligible CPD Hours**

Business Ethics: It Starts With You

LEVEL Introductory

Prerequisite

None.

Overview

This course offers an introduction to understanding and managing ethical issues in a business setting. Through case work and open dialogue, it explores the intersection amongst prominent theoretical approaches to ethics, personal values, business values and how they shape business decisions. We consider the rightness and wrongness of human conduct in a business setting based on these approaches. The course will offer a brief historical review and investigate various ethical theories. The goal is to build a foundation for participants to investigate the ethical dimensions of controversial business issues.

Applicable for

Individuals and leaders wishing to understand, reflect, and manage ethical issues in a business setting.

Content

- foster an ethical mindset - explore and assess the contextual issues in business ethics and the ability to think critically and ethically within them
- identify your "ethical standard" and how to communicate this standard in support of business decisions - how you manage a series of ethical dilemmas including how you structure ethical issues, use data and develop conclusions
- develop communication strategies in support of ethical actions - examine formal and informal communication tools to effectively communicate ethical ideas
- examine your understanding of key concepts and terms in business ethics - develop an awareness of the impact on ethics and business decision making at all levels of an organization
- reflect on ethical issues in a business context - collectively explore a problem in impact of business ethics in a global context in order to develop a perspective that matches their perceptions and evidence

Seminar Material Format

Paperless materials only.

Ethics Hours

This seminar is eligible for 4 hours of ethics content.

Seminar Leader

Dr. Shawn Ireland, Ph.D.

Fee $225 **PD Passport Valid – 1/2 Passport Day** **4 Eligible CPD Hours**

For dates, times and venues – see page 15

Ethical Leadership in an Age of AI

LEVEL General

Prerequisite

None.

Overview

CPAs have a leadership role to play in this era of disruptive technology. Advancements in artificial intelligence create strategic opportunities for organizations and raise unique ethical challenges for business leaders. In this session, we'll highlight recent advancements in AI and explore how it can be expected to change our CPA roles. In particular, we'll evaluate the ethical implications when facing challenging AI-related decisions, by framing these decisions in the context of the requirements of the CPA Code of Professional Conduct.

This interactive session will illustrate some of the recent advancements in AI and some of the expectations for the future. We'll review key elements of frameworks being developed by organizations to design trust into the AI environment, and see how the principles in these frameworks relate to our CPA Code of Professional Conduct. Participants will work together to evaluate a variety of scenarios and explore the implications of AI technologies on our role as ethical leaders.

By the end of this course, participants will be able to

- identify the ethics-based issues and challenges related to AI technologies
- analyze how AI provides opportunities to support ethical decision-making in organizations
- evaluate the ethics dimensions of AI decisions and determine appropriate actions using a systematic approach

Applicable for

CPAs in any role and in all levels of organizational decision-making who have an interest in the ethics elements of technology-related decisions.

Content

- the current state of AI and where it is expected to go
- key ethics concerns and challenges for business leaders
- emerging principles and frameworks in ethical AI development
- decision-making in alignment with the CPA Code
- relevant resources within and outside of the CPA profession

Seminar Material Format

Paperless materials only.

Ethics Hours

This seminar is eligible for 4 hours of ethics content.

Seminar Leader

Laura Friedrich, FCPA, FCGA

Fee $225 **PD Passport Valid – 1/2 Passport Day** **4 Eligible CPD Hours**

Ethics and Technology

LEVEL Introductory

Prerequisite

None.

Overview

With the explosion of technology in the workplace that has occurred over the past thirty years, a fair question to ask is "what are the ethical considerations and impacts related to this technology?" Practical technology issues such as data privacy and security no doubt carry ethical considerations, but technology also affects the ethics associated with issues such as work-life balance, the digital divide, training needs, copyrights, and fraud.

In this course, you will learn about "technoethics" and the implications this has on individuals and organizations. To that end, you will explore many of the current and emerging issues associated with ethics and technology, such as copyrights, cybercrimes, privacy versus security, and geo-tracking technologies. Given the deep implications associated with ethics and technology, this could be the most important session in which you will ever participate.

Applicable for

CPAs who desire a deeper understanding of key ethical issues facing the profession today

Content

- distinguish between ethics and morals
- define technoethics and identify examples of business ethics issues and how they are affected by technology
- recognize the influence of technology on ethics requirements in Codes of Conduct
- list at least five examples of potential ethics issues associated with leading technologies today

Seminar Material Format

Paperless materials only.

Ethics Hours

This seminar is eligible for 4 hours of ethics content.

Seminar Leader to be drawn from

Ward Blatch, CPA, CA
David Millette, CPA, CA

Fee $225 **PD Passport Valid – 1/2 Passport Day** **3.5 Eligible CPD Hours**

SEMINAR MATERIAL — PAPERLESS | OPTIONAL — LAPTOP

Ethics at our Core

LEVEL Introductory

Prerequisite

None.

Overview

Commitment to ethical conduct and protecting the public are what differentiate CPAs as essential business leaders. Adherence to the CPA Code of Professional Conduct is not just a professional obligation, it's a source of pride, value, and competitive distinction. Our stakeholders rely on our judgment and guidance, but ethical dilemmas can be complicated, and determining how to implement the best course of action can be challenging. This course will provide participants with an opportunity to refresh and update their knowledge of the CPA Code and build competence in interpreting and applying the Code to resolve a variety of realistic situations. Participants will also explore the current environment of workplace ethics and assess the implications for ethical leadership. The workshop emphasizes collaboration and interactivity, as participants are engaged with their peers on a variety of activities including quizzes, comparative surveys, and case studies. CPA Codes across the country except the Quebec Code are covered in this course.

Applicable for

This course is applicable to CPAs at all levels of their career, and in any type of organization. The course draws on examples and interactive activities across a range of industries and roles that reflect the breadth of the profession. Special care will be taken to balance the contexts of industry, government, not-for-profit, and public practice/public accounting. Sufficient content will be provided such that any given offering can be over-weighted in its focus (through additional examples and/or case studies) to be more reflective of the audience in the room.

Content

- apply research and critical thinking skills to analyze ethical challenges
- identify key ethics trends in the Canadian and global business environments and determine the implications for business leaders
- use the CPA Code of Professional Conduct as a resource for decision-making, on par with other professional standards
- interpret and apply the CPA Code to resolve ethical issues
- apply professional judgment in determining the most appropriate action, and defend their decisions
- plan ways of enhancing their own organization's ethical culture

Seminar Material Format

Paperless materials only.

Ethics Hours

This seminar is eligible for 4 hours of ethics content.

Seminar Leader

Laura Friedrich, FCPA, FCGA

Fee $225 | **PD Passport Valid – 1/2 Passport Day** | **4 Eligible CPD Hours**

SEMINAR MATERIAL — PAPERLESS | OPTIONAL — LAPTOP

Shades of Grey: Ethics in the Workplace

LEVEL Intermediate

Prerequisite

None.

Overview

This course aims to develop and enhance the participants understanding and application of business and professional ethics. Throughout the session, numerous case studies and ethical dilemmas are used to encourage discussion and explore moral philosophy in the workplace.

Applicable for

Professional accountants who have decision-making and reporting responsibilities within their organizations.

Content

In this course, you will learn

- the core of ethics, including the professional codes and sources of ethical guidance
- how ethics impacts the culture and environment of an organization
- professional conduct, including independence, objectivity and dealing with conflicts of interest
- ethical decision-making, including exercising professional skepticism and using ethical frameworks to assist in the process
- confidentiality and acts considered discreditable to the profession

Seminar Material Format

Paperless materials only.

Ethics Hours

This seminar is eligible for 4 hours of ethics content.

Seminar Leader

Jeff Price, CPA, CGA

Fee $225 | **PD Passport Valid – 1/2 Passport Day** | **4 Eligible CPD Hours**

For dates, times and venues – see page 15

Understanding and Embracing Ethics in the Workplace

LEVEL Intermediate

Prerequisite

None.

Overview

"I believe…. therefore I do…" Research shows that despite our best intentions and conviction to our values, our actions in times of conflict or stress may not be what we expect.

This session provides an opportunity to challenge and uncover what "ethics" means in a professional context and how our goals, values and traits drive our responses in times of conflict and stress. Participants will have opportunities to practically apply what they learn through interaction and knowledge exchange with their peers.

Applicable for

CPAs and other business professionals seeking to better understand the challenges of ethics in the workplace and how best to prepare and manage responses to ethical challenges.

Content

In this course, you will learn

- how to manage organizational dynamics when personal ethics conflict with corporate values
- various approaches to ethical thinking
- the impact stress and conflict has on our thoughts and actions how we can best prepare to work in this environment
- the impact of deadline and goals/objectives in driving ethical performance
- ethics from a broad organizational perspective as it relates to Corporate Social Responsibility (CSR)
- to apply and practice specific techniques, tools and strategies based on relevant business based scenarios

Seminar Material Format

Paperless materials only.

Ethics Hours

This seminar is eligible for 4 hours of ethics content.

Seminar Leader

Tammy Towill, FCPA, FCMA

Fee $225 | **PD Passport Valid – 1/2 Passport Day** | **4 Eligible CPD Hours**

Achieving Balance in Work and Life

LEVEL General

Prerequisite

None.

Overview

Due to the constant stress of a fast paced life, overwork, and family demands, it's easy to feel one's life is out of balance. When this happens, all areas of your life can suffer. By learning key methods for setting priorities and goals, overcoming stress, and deciding what's most important to you, you can achieve new levels of balance and greater results. Having more balance in your life will allow you to do less of what you don't want and more of what is truly important to you.

By the end of this course, participants will be able to

- understand and achieve your real priorities – in work and life
- increase relaxation without decreasing productivity
- create excellence in your work and life
- learn how to change behaviors that no longer serve you

Applicable for

Those interested in learning how to achieve and maintain a better balance in their work and personal life.

Content

- exploring balance
  - how modern day life pulls people off balance, and how you can compensate
  - why people get burned out, and how you can avoid it
  - overcome excuses that lead us to get out of balance
  - three skills you need to learn to enjoy long term balance
- knowing what's important
  - know what is really important to you, versus what your boss or parents tell you is important
  - set goals in work and life and to ensure your progress
  - make sure what your priorities are and how to stick to them
  - say no to things that draw your life out of balance
- creating excellence
  - three keys to going beyond mediocrity and into excellence
  - stay consistently motivated over a long period of time
  - three things that get in the way of excellence, and how to avoid them
  - inspire your co-workers, friends, and family towards excellence

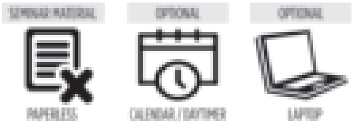
Seminar Material Format

Paperless materials only.

Seminar Leader

Jonathan Robinson

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**



Balancing Your Wheels

LEVEL General

Prerequisite

None.

Overview

No matter where your life path leads there will always be bumps in the road. Job interference with personal and family time is a significant source of stress that creates these bumps. Over 48% of Canadians have reported that their stress has increased significantly in the last few years. Learning to navigate through this uneven terrain requires new tools.

In this session, we will explore some of the following questions. Do you feel that you have the power to overcome this overwhelming challenge? Are you living your life according to your personal priorities? Are you able to tend to your personal relationships? To your personal health and well-being? If not, how is this impacting your life? What are the costs? To you? Your team? And your career?

Applicable for

Individuals who may feel that their calendar is too full, and getting in the way of living the life they want.

Content

In this session, you will learn

- how to re-draft your life according to your personal and professional priorities.
- the Four Circles – how the 4 key domains of life intersect and support our lifestyles
- self-assessment, and determine how balanced you currently are
- how to develop a personal 'whole life' vision
- key optimizers that will help you manage your resiliency and energy

Seminar Material Format

Paperless materials only.

Special Notes

To get the most out of this seminar, please bring your calendar or day-timer with you.

Seminar Leader

Lesley-Ann Marriott, CEC, PCC

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

Becoming...what you *really* want to be

LEVEL Intermediate

Prerequisite

None.

Overview

What kind of life do you seek for yourself? Do you know what you want to do but aren't sure how to do it? If you could, would you change your career trajectory? Have you discovered your life's purpose, achieved your potential, arrived at the professional plateau to which you aspire? Have you reached a "mid-point" but don't know what the rest of your career or life will offer? If yes, then NOW is the time to figure it out. When you ignore the questioning voice within, you become the architect of your own misfortune.

This course is about the rest of your life. Why spend it doing what you don't enjoy or what doesn't nourish you? Is being "a good accountant" the legacy you want? If, despite your many talents and desires, you haven't arrived where you want to be, are at a crossroads or just want to get off the treadmill, this life-altering course was designed with you in mind. It provides the principles and practicalities of becoming extraordinary.

Applicable for

Individuals looking for a roadmap for changing their lives … and those who genuinely believe they can.

Content

Discover how to

- achieve your full potential in life
- know what it will take (a realistic self-assessment)
- map the best route to reach your desired destination
- align your key priorities with your time, energy and effort
- articulate your non-negotiable rules for living
- connect with key influencers and get good advice
- promote, impress, sell and build your brand
- move from "just average" to extraordinary
- find and strengthen the drive to succeed
- live a life of purpose: choices you need to make

Seminar Material Format

Paperless materials only.

Seminar Leader

Dr. Jim Murray

Fee $475 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

For dates, times and venues – see page 16

Brain Focus: The Power of Full Engagement

LEVEL General

Prerequisite

None.

Overview

The way we're working isn't working. The success you achieve in life depends on the knowledge you possess. But today, with vast amounts of information pouring in every minute from hundreds of sources, acquiring the knowledge you need has become a major challenge. This course gives you clear and practical ideas to help you learn anything better, easier, faster, and will help you master the skills of absorbing, retaining and using knowledge more effectively.

This course is packed with tips, stories, ideas, and strategies, to help your brain and information management skills.

Applicable for

Anyone who wants to improve productivity, regain focus, and work smarter all day long.

Content

In this session, you will learn how to

- overcome limiting beliefs that block your ability to learn and to succeed
- set up a 'brain friendly' environment that supports learning and work
- reduce stress from information overload
- read faster and remember more
- think more creatively
- eat with your brain in mind
- learn the #1 skill that experts agree is the most crucial to your success

Seminar Material Format

Paperless materials only.

Seminar Leader

Terry Small, B.Ed., MA

Fee $225 | **PD Passport Valid – 1/2 Passport Day** | **3.5 Eligible CPD Hours**

Coach Yourself First

LEVEL General

Prerequisite

None.

Overview

Why is it that some managers and leaders inspire people to be the best they can be and others don't? What do they possess that fosters inspiration for people to become valuable assets in their organizations? The answer is simple – they coach from a position of authenticity and personal connection. In this course, you will gain a deeper understanding of your personal coaching style and its impact on others. You will discover the power of personal passion, engagement and purpose to manage yourself, and coach others to be effective coaches, in your organization.

Applicable for

Managers and leaders wishing to strengthen their personal coaching skills, self-awareness, and effectiveness in connecting wholeheartedly and authentically.

Content

In this session, you will learn how to

- identify your personal coaching strengths, values, preferences, and ways of working
- assess your coaching identity
- develop a clear personal vision and goals for coaching
- use emotional intelligence theory, the theory of emotional regulation, and their applications
- analyze your own reactions, judgments, emotions, and thought processes that support and hinder authenticity in coaching

Self-assessments, exercises, and skills practice, will be used to develop a better understanding of yourself and the challenges of authenticity as a coach.

Seminar Material Format

Paperless materials only.

Seminar Leader

Dr. Shawn Ireland, Ph.D.

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

Critical Thinking and Self Reflection

LEVEL Intermediate

Prerequisite

None.

Overview

Successful leaders and managers have one thing in common – they learn by doing and by applying their experience to day-to-day activities. At the core of their learning style is a continuous examination of the taken-for-granted assumptions that form their approach to decision-making and relationships. This one-day course identifies the link between learning styles, critical thinking and self-reflection in our working and personal lives and how to use these to enhance personal effectiveness.

Applicable for

Leaders and managers who want to develop their critical thinking skills to enhance their personal effectiveness.

Content

In this session, you will

- examine the stages in the transformation process in adult development
- explore the "Window on Yourself" - values, beliefs, perceptions
- identify and diagnose your learning style, and your own ways of thinking and working
- get introduced to critical thinking tools and techniques about self-motivation and keeping a positive bias to challenge assumptions through critical self-reflection
- identify of thinking styles and their role in critical thinking
- action plan, including the use of interpersonal and self-assessment tools to reintegrate new perspectives

Seminar Material Format

Paperless materials only.

Seminar Leader

Dr. Shawn Ireland, Ph.D.

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

Influence and Assertiveness

LEVEL General

Prerequisite

None.

Overview

Well-developed influencing skills and assertiveness are key competencies for managers in their day to day activities. This highly interactive course provides tools and techniques for enhancing the impact of power and influence and assertiveness with decision-makers and peers.

Applicable for

Individuals wishing to increase their influence and assertiveness, improve relationship building, and increase their impact within their organization.

Content

In this session, you will learn about

- three methods of influence
- sources of power and influence
- phases of influence
- how to conduct a quick influence test
- the bases of influence and conditions of their use to establish and use credibility, reciprocity and persuasion in different situations
- what is assertive, aggressive and passive behavior
- assertive communication
- a "Bill of Assertive Rights"
- what is assertiveness inventory
- the assertive invitation and techniques
- personal influence auditing – what are your own power and influence preferences
- action planning for the future

Seminar Material Format

Paperless materials only.

Seminar Leader

Dr. Shawn Ireland, Ph.D.

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

For dates, times and venues – see page 16

Personal Effectiveness: Self Awareness and Balanced Thinking

LEVEL General

Prerequisite

None.

Overview

Successful people have one thing in common – they learn by doing and by applying their experience to day to day activities. Through understanding themselves, their values and motivators, and by continuously examining their taken-for-granted assumptions, they are able to adapt and improve their communication and management styles, their approach to decision-making and relationships. 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.

Applicable for

Individuals wishing to enhance personal awareness to enhance their personal effectiveness.

Content

In this session, you will learn about

- self-understanding and personal growth: the "Window on Ourselves", including assessing our preferred ways of thinking and working
- self-motivation, self-image and self-appraisal
- to challenge assumptions through critical self-reflection
- communication and management styles
- how to link your thinking and emotions to develop your own emotional intelligence
- how to foster appreciative inquiry
- how to capture knowledge and be introduced to "deep smarts" techniques
- how to action plan with the use of interpersonal and self-assessment tools to implement fresh perspectives

Seminar Material Format

Paperless materials only.

Seminar Leader

Dr. Shawn Ireland, Ph.D.

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

Professional Presence

LEVEL General

Prerequisite

None.

Overview

What makes some of us successful, while others with the same skill level are left behind? Improve your professional presence, enhance your personal profile and as a result, your business relationships. In today's world we need to make a good first impression quickly; through email, voice and face-to-face. This practical, interactive one-day course will provide you with valuable skills to increase your effectiveness and your confidence in any situation.

Applicable for

Anyone wanting to build better business relationships.

Content

In this session, you will learn how to

- demonstrate proper business etiquette
- create a dynamic and lasting first impression
- master the "invisible" impression you send through electronic correspondence and voice mail
- use a "personal tagline" to construct a memorable introduction - ensuring the right people don't forget you
- master small talk and networking
- practice social savvy business entertaining
- manage effective non-verbal communication
- display "professional presence" in difficult situations

Seminar Material Format

Print copy only, no paperless option.

Seminar Leader

Rhonda Caldwell

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

Shortcuts to Success: The 14 Best Tools for Personal and Professional Growth

LEVEL General

Prerequisite

None.

Overview

We all want to be successful in life, but most of us have not learned what really leads to a life of abundance, happiness, purpose, and great relationships. In this seminar you will learn the most effective methods for attaining success. In his interviews with such people as Oprah, the Dalai Lama, Deepak Chopra, Tony Robbins, Ted Turner, and dozens of others, Jonathan has learned what really works and what does not. In this seminar you'll learn the best personal and professional growth techniques he's acquired over his 40 year career.

By the end of this course, participants will be able to

- communicate effectively with anyone-even difficult people
- relax instantly and avoid burnout
- stay motivated on your job, week after week
- tap into your creativity and intuition to create even more success
- manifest whatever goal you have at an accelerated rate
- easily overcome your personal or professional fears, such as public speaking and fear of failure

Applicable for

Those interested in learning how to achieve and maintain a better balance in their work and personal life.

Content

- what really leads to success in the modern world
  - five things that correlate with fulfillment
  - five skills that lead to personal success
  - why "inner technology" is so important to succeed
- mastering the art of communication
  - why communication is so important
  - five mistakes people often make when they communicate
  - solve problems without bruising egos
  - get people to want to work with you
- the magic of motivation
  - consistency
  - why people normally don't stay motivated
  - why procrastination is a problem
  - how to motivate other people
- overcoming your fears
  - why people have fears, and how they can be overcome
  - three skills needed to overcome any fear
  - identifying fears that stop you, and a plan to overcome them

Seminar Material Format

Paperless materials only.

Seminar Leader

Jonathan Robinson

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

Time Management: The Essentials of Productivity Skills

LEVEL General

Prerequisite

None.

Overview

The "time management" challenges of the 21st Century workplace are very different - old solutions don't work anymore! This leading edge course will provide you a new mind-set and skill-set that will optimize your personal productivity learning to produce greater results in less time. Participants will learn how to gain and keep control of competing priorities, concurrent projects and critical deadlines. The focus on practicality means that people walk out with techniques they can apply the next day.

Applicable for

Individuals who feel time-challenged, or feel that they don't have enough time in their days.

Content

In this session, you will learn

- the 4 vital productivity principles that top performing executives understand and apply every day
- how to implement workload reduction strategies by identifying and cutting time wasting activities
- the truth about "wasting time"… and how to minimize it
- to stay on track - limit other people taking control of your day
- to create "to-do lists" that really work, overcoming frustration
- to set and manage multiple and constantly shifting priorities
- 3 critical organizational tools essential to create a highly efficient workspace
- multi-tasking - when is it OK or counter-productive
- 4 core components of creating an airtight system
- 12 proven techniques for minimizing interruptions
- how to say NO without feeling guilty
- how to attempt to tame the monster - tips and techniques
- 8 essential techniques to overcome procrastination
- strategies and tactics for creating productive meetings

Seminar Material Format

Paperless materials only.

Seminar Leader

Greg Campeau, B.Comm.

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

For dates, times and venues – see page 16

Triple Your Reading Speed

LEVEL General

Prerequisite

None.

Overview

Do you have enough time to read? Are you tired of feeling info-whelmed? Too many emails? Have you ever finished a page and asked yourself, "What did I just read?" Chances are, you are reading far below your capabilities. Using the latest discoveries about the brain and learning, Terry has trained over 230,000 people to boost their reading power, and move ahead at school or on the job! In addition, vocabulary enrichment will be stressed. Whether you are a student, business person, or a recreational reader... you can quickly, easily, and dramatically improve speed and comprehension!

Applicable for

Individuals wishing to start reading faster today, including those who consider themselves to be a hopelessly 'slow reader'.

Content

In this session, you will learn

- how to get the most powerful reading tool ever invented to quickly increase your reading speed
- the #1 secret of comprehension (it's not what you think)
- how to save a lot of time
- memory enhancing techniques
- the real reason reading is so good for your brain to improve your vocabulary
- motivational tips, plus advice on goal-setting and time management
- your decisions on what to read, and what not to read
- how to understand confusing, or poorly written material

Seminar Material Format

Paperless materials only.

Seminar Leader

Terry Small, B.Ed., MA

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

We Have to Talk – Having the Difficult Conversations

LEVEL General

Prerequisite

None.

Overview

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.

Think of a conversation you've been putting off. You know you should speak to someone, but you don't. Maybe you've tried to have a conversation and it went badly. Or maybe you fear that talking will only make the situation worse. Why are you delaying it? What is causing the hesitation?

Applicable for

Those who feel stuck, put off difficult conversations, and who would like to free up the energy used to think about the conversation for more useful purposes.

Content

- apply best practice strategies
- complete a check list of action items to consider before having the difficult conversations
- demonstrate useful concepts to practice during the conversation
- apply some tips and suggestions to help them stay focused and flowing in general, including possible conversation openings

Seminar Material Format

Paperless materials only.

Seminar Leader

Dr. Shawn Ireland, Ph.D.

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

Assessing and Responding to Workgroup Conflict

LEVEL Intermediate

Prerequisite

None.

Overview

This half-day workshop introduces a framework for identifying and assessing workgroup conflict and focuses on fostering the behaviours that support success at the individual, team and enterprise levels , and how to minimize the incidences and the impacts of harmful behaviours.

The session will give participants the frameworks for identifying and assessing workgroup conflict, a range of response processes, and guidance on applying the right responses to specific situations. Studies show that conflict can arise in any workgroup over time. Real risks of harm to individuals, teams and the enterprise can surface when workgroup conflict remains unaddressed. Leaders have the responsibility to prevent, identify and respond to workgroup conflict. With the right resources and insights, they can inspire courageous decision-making and foster success at all levels.

By the end of this course, participants will be able to

- identify and assess workgroup conflict
- identify and describe a toolbox of processes for use by leaders in responding to workgroup conflict
- make reasoned, defensible and explicit decisions about which response process to use in a specific case,
- make reasoned, defensible and explicit decisions about when to escalate response processes
- foster behaviours in workgroups that support success at the individual, team and enterprise levels, and minimize incidence and impact of behaviours that create risk

Applicable for

Anyone who has responsibility for identifying, assessing and responding to workgroup conflict. Note that this will not be an in-depth training on specific response process; instead it is a meta-process for deciding which process to use in a specific case.

Content

- different ways that conflict can arise and manifest in workgroups
- why people engage in behaviours that can cause conflict
- approaches to changing behaviours in workgroups
- building a toolbox for responding to workgroup conflict
- which tool to use when – and when to escalate your response
- how to stop trying to control people's behaviour – and to hold them accountable for the choices they make

Seminar Material Format

Paperless materials only.

Seminar Leader

Christian Codrington, CHRP

Fee $225 **PD Passport Valid - 1/2 Passport Day** **3.5 Eligible CPD Hours**

Building High Performance Teams

LEVEL Introductory to Intermediate

Prerequisite

None.

Overview

Companies live or die on the quality of their managers. The science of management offers profound and compelling new insights on how to build great teams but the actual practice of management hasn't budged in 30 years. Worldwide, only 16% of employees are fully engaged, the rest are "just coming to work." Every business leader knows employees represent their biggest expense and best opportunity for achieving competitive advantage. Yet research tells us today's workforce is inefficient, stressed out, apathetic, distrustful and entitled. If these symptoms don't characterize your workplace, you're either lucky, complacent or not paying attention.

Applicable for

Anyone who wants to nurture productivity, motivate employees, encourage two-way feedback and genuinely excite those who ultimately determine your fate.

Content

Learn how to

- build and manage a high performance team
- diagnose and remedy your team's productivity, accomplish more in less time, become stress and dispute free, and "turn on" a new generation of knowledge workers
- answer the critical questions that lead to high performance
- turn on and engage efficiency and loyalty in your workforce
- give and get the feedback that nurtures accountability
- design employee surveys and exit interviews that actually inform
- deal with annoying, dysfunctional and toxic co-worker behavior
- become stress and dispute-free (the process and the tool)
- motivate and reconcile the needs of different generations
- get people to work smart rather than (burn-out) hard
- enable managers to lead a high performance team

Seminar Material Format

Paperless materials only.

Seminar Leader

Dr. Jim Murray

Fee $475 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

For dates, times and venues – see page 16

Coaching for Executive Excellence

LEVEL Advanced

Prerequisite

A few years of managerial and/or supervisory experience will be beneficial.

Overview

Great leaders build confident, self-sufficient teams. Does your team get your best? Are they challenged, inspired, and supported by your leadership style? A core competency of leadership is coaching. In fact, modern coaching is becoming the management style of choice. Why? Coaching has the power to sustain change over the long term. Learning coaching techniques will help you empower your team to extend beyond their own capacity.

At the end of this course the participant should be able to

- differentiate coaching from common management strategies
- create great coaching relationships
- use coaching techniques for business oriented goals
- coach by identifying opportunities for employee development
- deliver 3rd party feedback
- criticize people so these people will THANK you
- experience both sides of coaching

Applicable for

Senior managers and leaders, and accounting and business professionals wishing to enhance their effectiveness in coaching peers and direct reports.

Content

In this seminar, you will learn

- the theory behind effective coaching techniques with live coaching demonstrations
- how to build coaching relationships and how to apply coaching in everyday management situations
- two powerful coaching models
- four-part coaching model used by professional coaches
- Transformational Coaching Model™ designed specifically for coaching in the workplace
- various coaching techniques to help people make sustainable changes
- hands-on coaching by participants with REAL-LIVE feedback from a team of credentialed coaches
- the Great Questions™ coaching game – participants engage in their own coaching scenarios

Seminar Material Format

Paperless materials only.

Seminar Leader

Lesley-Ann Marriott, CEC, PCC

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

Dispelling the Myth of "Effective Meetings"

LEVEL General

Prerequisite

None.

Overview

The objective of this seminar is to have participants leave the session with a specific planning framework tool designed to assist their team in building meetings that are relevant, productive, engaging and yes, even welcomed by others in their organization.

Applicable for

Anyone who has been frustrated in an ineffective meeting or has frustrated others by running an ineffective meeting.

Content

In this seminar, participants will

- weigh in on just how big an issue this really is
- explore value and benefit of contribution to meetings while challenging the structure of how these meetings are undertaken
- challenge what being inclusive looks like
- look at best practices and recent research on new innovative ideas
- consider the impacts of how individual communication styles and organizational culture drive the way organizations use meetings
- discuss how technology is both a tremendous opportunity and a unique challenge

Seminar Material Format

Paperless materials only.

Seminar Leader

Tammy Towill, FCPA, FCMA

Fee $225 **PD Passport Valid – 1/2 Passport Day** **3.5 Eligible CPD Hours**

Effective & Essential Management Skills

LEVEL General

Prerequisite

Managerial and/or supervisory experience is beneficial.

Overview

The objective of this fast-paced, interactive (no role plays) and highly practical learning experience is to enhance your tactical managerial and coaching skills.

Participants will learn how to drive high degrees of engagement, and how to delegate, empower, and provide meaningful feedback to their people.

Applicable for

Managers who want to learn how to bring out the best in their people while optimizing their performance.

Content

Creating a culture of engagement and teamwork

- what engagement really means
- how to measure engagement
- factors that build and erode engagement
- understanding group dynamics; develop team synergy
- the 11 characteristics and four core elements of high performance teams
- developing clear performance expectations for the team
- the most common team pitfalls and how to avoid them
- the seven roles of a highly effective team leader

Delegation and empowerment

- the principles of effective delegation
- what empowerment really means and why it is so important
- the complete 7 step delegation process
- the risks and restrictions of empowering people
- how much freedom and latitude to give an employee
- create clear "outcome-based" performance expectations
- determine what performance feedback is appropriate
- facilitate problem solving process to prevent reverse delegation

Seminar Material Format

Paperless materials only.

Seminar Leader

Greg Campeau, B.Comm

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

Empowering and Engaging Others

LEVEL Intermediate

Prerequisite

None.

Overview

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.

Applicable for

Leaders and managers who want the tools and confidence to become more effective in their positions.

Content

In this session, you will learn

- the challenges and benefits of delivering superior performance
- styles of management and leadership and their impact on working relationships
- how to empower and engage employees through a coaching style of management and leadership
- the qualities and skills of an effective manager: values, beliefs, assumptions, biases; building rapport and trust; effective listening and questioning; critical thinking; feedback
- tools and techniques to support engagement in diverse situations
- effective action planning

Seminar Material Format

Paperless materials only.

Seminar Leader

Dr. Shawn Ireland, Ph.D.

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

For dates, times and venues – see page 16

Essence of Leadership

LEVEL Introductory to Intermediate

Prerequisite

None.

Overview

What type of leadership matters? There is an overwhelming amount of theories and research on this topic, but given that it is completely unintegrated, it is easy to get lost in the vast sea of solutions. The fact remains: unless we define the type of leadership that matters in our organizations, we are stuck in neutral – we are standing still and yet all around us things are speeding up. The need for effective leadership continues to intensify as complexity escalates and disruption accelerates. It is imperative that leaders grow and develop to meet the complex realities of today's business environment.

This workshop creates the time and space to specifically define and understand the type of leadership that matters. We focus on the Universal Model of Leadership™ which is used by some of the world's most iconic brands to take on the complex task of developing leaders for the future. This powerful psychometric instrument integrates 50 years of leadership theory and research, meaning that you are getting the best leadership thinking available today.

Applicable for

Anyone with an appetite for deep and specific exploration of leadership, committed to find their own growth edge and who wants to create a breakthrough in performance.

Content

- the nature of work today, and how to meet the challenge
- the four Universal Promises of Leadership
- research that connects the Universal Model, leadership effectiveness and business performance
- the "Inner and Outer Games" of Leadership through the lens of neuroscience
- assessment results – using the Universal Model of Leadership™, how to target your area(s) for development that promise you the greatest pay-off

Seminar Material Format

Print copy only, no paperless option.

Special Note

All participants will complete the Universal Model of Leadership™ Self-Assessment and receive a copy of the book, Mastering Leadership: An Integrated Framework for Breakthrough Performance and Extraordinary Business Results.

Seminar Leader

Alex Wray

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

Giving and Receiving Feedback in the Workgroup

LEVEL Intermediate

Prerequisite

None.

Overview

This interactive, half-day workshop addresses one of the key reasons why people avoid giving or receiving feedback in the workgroup: They don't know how. Throughout this time together, participants will learn a practical, effective framework for giving and receiving feedback in a workgroup context. While there is no way of controlling how the other person will behave in a feedback conversation, there are specific tools and techniques that participants will learn to positively influence the other person's behaviour in the feedback conversation and to ultimately hold the other person accountable for any bad behaviour, if necessary.

Without practical, accessible methods for giving and receiving feedback and techniques for dealing with challenges that can arise during feedback exchanges, things can easily escalate. With those resources, people are better equipped to bring personal leadership to their own positions, wherever they may sit in the organizational hierarchy. Participants will acquire skills and competencies through real-life examples, case studies, dialogue and role-play that will enhance the productivity of their interactions with anyone else in a work-related context, whether more senior leaders, peers, direct reports, clients or members of the public.

Applicable for

Those responsible for providing feedback to others in the workgroup, including executive and senior finance leaders who have HR programs within their scope of responsibility; frontline managers of workgroups; and finance professionals who wish to support the development of high-performance teams and organizations.

Content

- identifying the range of workgroup situations that may require feedback
- the differences between effective and ineffective feedback
- why it's sometimes appropriate to not give feedback
- how to prepare for and deliver effective feedback
- how to respond when you don't like the way someone is giving you feedback
- how to recognize deal with feedback resistance

Seminar Material Format

Paperless materials only.

Seminar Leader

Christian Codrington, CHRP

Fee $225 **PD Passport Valid – 1/2 Passport Day** **3.5 Eligible CPD Hours**

Leadership and Coaching

LEVEL Intermediate

Prerequisite

None.

Overview

The climate that leaders create in their working environment is a key factor in the performance of their teams, and ultimately the results of their organization. This course focuses on equipping participants with the knowledge and skills to become effective and respected leaders, able to turn compliance into commitment to achieve the desired results for their business unit, teams and themselves in a more effective manner.

Applicable for

Leaders and managers wishing to enhance their leadership skills and achieve improved performance.

Content

In this session, you will learn

- the process of strategic leadership and the leadership triangle
- inspirational leadership
- leadership for change: shared core values
- coaching for growth
- coaching and mentoring for performance improvement – maximizing individual competencies and enabling others to fulfill their potential
- action planning

Seminar Material Format

Paperless materials only.

Seminar Leader

Dr. Shawn Ireland, Ph.D.

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

Learning to Lead – The Essentials

LEVEL General

Prerequisite

None.

Overview

The course will provide 'the essentials' – good foundation of knowledge, skill, and will - needed to be successful in your first leadership role.

We will explore what leadership is, what successful leaders in a work environment actually do that makes them successful, and the positive difference effective leadership makes to people, operations, and the organization. We will address and understand the transition and challenges involved in going from being a member of a team to leading one. We will also learn the essential skills and behaviours required to transition successfully into a leadership role and reach the point where you earn willing followers. A combination of skill training, sharing of best practices, experiential learning, and practical exercises will be used to deliver the learning. There is a strong bias towards practical approaches over theoretical ones, and lots of real-life stories to illustrate that effective leadership is really about what you chose to do.

By the end of this seminar, participants will be able to gain

- greater confidence in their ability to lead others
- less work 'on your plate' as a result of being ready, willing and able to delegate effectively
- willing followers

Applicable for

Those with leadership aspirations, who have recently commenced a leadership role in their organization, or who are seeking a highly practical leadership 'refresher'.

Content

- diagnose most effective leadership style for individuals in your team
- adjust your leadership style to the needs of an employee, task or situation
- reach agreement with team members on how much direction and support they need to become self-reliant, peak performers
- provide constructive feedback when someone's work performance is off-track
- give appropriate recognition when someone's work performance exceeds expectations
- coach employees that have performance issues
- leverage the most powerful leadership behaviour there is - leading by example
- use a simple communication technique to build support for needed change quickly

Seminar Material Format

Paperless materials only.

Seminar Leader

Rob Gilfoyle

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

For dates, times and venues – see page 16

Managing Across Generations

LEVEL General

Prerequisite

None.

Overview

With the varied preferences of the four generations in our organizations with regard to values, style and nature of communication, respect, boundaries and priorities, today's supervisors and managers must continually learn to understand these differences, be agile in responding, make adjustments to their own style and identify potential roadblocks to management success.

In this course, participants gain an appreciation for the preferences, strengths and challenges that members of each generation offer, the values that inform their views and perspective of work and the work-place, the motivations of each generation, and working with practice cases to apply the concepts.

Applicable for

Leaders who want to get the most from team members by understanding generational differences, and learning how to be agile in their own management style.

Content

- identify how their generational views and context influences their actions and decisions.
- explore areas of friction and agreement by understanding generational differences
- examine their management "style" and its impact on cultural, generational and interpersonal effectiveness
- understand the relationship between management and leadership across generations
- engage others and motivate to align generational requirements to achieve their goals and their organizational vision and strategy
- engage in management behaviours that will contribute to organizational success with a focus on Millennial employees

Seminar Material Format

Paperless material only.

Seminar Leader

Dr. Shawn Ireland, Ph.D.

Fee $225 **PD Passport Valid – 1/2 Passport Day** **3.5 Eligible CPD Hours**

Managing My People

LEVEL Introductory

Prerequisite

None.

Overview

This interactive course will focus on helping managers get the most out of their people. Increasingly, managers are recognizing that their people provide the only true and sustainable way to differentiate their business offering and serve clients most effectively. The challenge is to maximize the contribution that people make to improve the success of that business. This course will equip managers with effective ways of working with their teams, in order to get the best out of each team member.

Applicable for

New and experienced leaders who are seeking to hone their management skills to drive enhanced performance of their teams.

Content

In this session, you will learn

- the characteristics and benefits of effective management – people as our competitive advantage
- the nature and purpose of management interventions
- how to build an effective management style
- how to assess what your team members need from you
- matching your management styles to development levels of staff
- how to inspire and motivate your colleagues
- about giving effective feedback
- the power of authenticity
- how to coach for development and improved capability

Seminar Material Format

Paperless materials only.

Seminar Leader

Helen Wale, MA, CPHR, CEC

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

What Do People Want? Motivating Yourself and Others

LEVEL General

Prerequisite

None.

Overview

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! To understand motivation you must understand human nature itself, and herein lies the problem. 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.

Applicable for

Managers or leaders wishing to ensure highly motivated teams for top performance outcomes.

Content

In this session, you will learn

- what people really want – exploring motivation
- self motivation and keeping a positive bias
- self appraisal
- motivation theories in practice
- extrinsic and intrinsic motivation
- achievement, power and affiliation
- equitable treatment: motivating versus de-motivating
- job characteristics that encourage staff engagement
- analysis of individual motivation
- motivation across cultures
- to use effective feedback to enhance performance
- how to move beyond productivity

Seminar Material Format

Paperless materials only.

Seminar Leader

Dr. Shawn Ireland, Ph.D.

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

Wiring Your Brain for High Impact Leadership

LEVEL Introductory to Intermediate

Prerequisite

None.

Overview

The brain has everything to do with who we are and what we do, and leadership is all about influencing who we are and what we do. Ninety percent of what we know about the brain has been learned in the last 2 years. Come and hear what Terry Small, a leader in the field of translating brain research into practice, has to say about brain engagement and learning to lead with the brain in mind.

Applicable for

Individuals wishing to leverage the latest research on the brain in order to become more effective leaders.

Content

In this session, you will learn

- how you can use the growing body of research on the brain to become a more effective leader
- why the brain resists change that prevents new ideas from being accepted
- how thinking habits influence our actions, especially with problem solving and conflict resolution
- the 5 things that Brain Science says that leaders MUST get right.
- leading from the Mind's Eye
- rewiring your brain for leadership
- leading self and others at the edge
- the science of peak performance
- the science of not being boring
- creating influence through an understanding of the brain
- the incredible importance of being a secure base and building trust
- what the amazing discovery of mirror neurons means for leaders and their teams
- the importance of bonding
- understanding that the person is never the problem

Seminar Material Format

Paperless materials only.

Seminar Leader

Terry Small, B.Ed., MA

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

For dates, times and venues – see page 16

Index

Considering Starting a CPA Practice

Prerequisite

None.

Overview

This on-demand webinar will provide general information at the contemplation stage of starting a public practice, and will address a number of pre-registration considerations with focus on the high-level business and regulatory requirements of running a public practice. Specific content will include: personal assessment; technical competency; business planning; licensing and regulatory requirements; and summary of resources available.

Applicable for

If you are contemplating starting a practice, have not been in public practice for a considerable length of time, or have less than five years of experience in public practice, you may want to check out this free, on-demand web session.

Content

- personal assessment: identify personal strength and areas for development, including
  - communication
  - self-confidence
  - entrepreneurial nature
  - ability to convey information
- technical competency self-assessment
  - tax experience (T1,T2 and other tax filings)
  - financial reporting (assurance) experience (bookkeeping, NTR, Review, Audit)
  - familiarity with provincial acts/bylaws/code of practice related to public accounting
- business planning
  - 3+ year budget and common revenue/expense items (setting rates/ upfront capital costs)
  - marketing/branding plan
  - approaches to starting a public practice (purchase vs. build client base)
- licensing and regulatory requirements
- summary of resources available (both free and subscription based), including CPA Canada toolkit, provincial websites, books and related material

Availability

This online session is available on-demand – register at pd.bccpa.ca. The session is eligible for 2 CPD hours upon successful completion of a quiz.

Starting a Successful CPA Practice

LEVEL Introductory

Prerequisite

None.

Overview

This seminar provides key information and assessment of the skill sets and tools needed to start and develop a successful CPA practice. It provides the practical knowledge needed to build a strong practice management framework, improve quality of service and client satisfaction, and explore the skills and knowledge needed to develop and build a successful practice.

Applicable for

New practitioners in small or medium-sized practices, particularly those with limited experience in public practice or practice management.

Content

- the profile of the public practitioner
- public practice regulatory framework
- professional liability insurance, how much and how to.
- setting up your practice
- business planning, marketing and staffing
- determining your practice profile
- fee levels, billing and collecting
- client management
- staffing, is it necessary?
- practice review, how to meet standards
- practice resources
- work/life balance

Seminar Material Format

Paperless materials. Print copy option available for $20.

Seminar Leader

Greg Buck, CPA, CA, B.Comm

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

Strategy, Governance, Risk & Human Resource

Strategic Management Certificate Program

Advanced Strategic Management Certificate Program

TITLE STATUS: NEW | SEMINAR MATERIAL: PAPERLESS | OPTIONAL: LAPTOP

Digital Transformation – To Do or Not To Do

LEVEL Introductory

Prerequisite

None.

Overview

An opportunity to learn everything you need to know about Digital Transformation (DT) – the 'why', 'what', 'when', and also, the most important 'how's' of this key, emerging strategy that is much talked about, but often misunderstood. Think of this seminar as the 'one-stop-shop' for DT.

Participants attending this seminar will gain career enhancing leadership skills that are currently in extremely short supply – with all the positive consequences that follow. They will have the knowledge and skills needed to become the 'go-to person' in your organization on the strategic, leadership and operational aspects of digital transformation.

Please note that this seminar deals only with the non-technology aspects of Digital Transformation such as strategy, leadership and organizational culture.

Applicable for

CPAs who are current or aspiring CEOs, company presidents, CFOs, VPs of Finance, company directors, treasurers, partners or consultants.

Content

- know exactly what DT is, and the business case for it;
- identify the profound consequences for your organization and its people of implementing a DT strategy;
- evaluate the costs and benefits of DT
- critically, understand the elements that need to be addressed successfully – Change Management, Vision, Strategy, Leadership, Organization Culture, Systems & Processes, Skills & People - to enable DT to deliver a worthwhile ROI
- estimate your organization's current state of readiness for undertaking a DT;
- become the most subject matter expert on DT in your organization, and,
- make an initial judgement on the 'do or not to do?' question.

This course is engaging, practical, and features real-life case studies.

Seminar Material Format

Paperless materials only.

Seminar Leader

Rob Gilfoyle

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

For dates, times and venues – see page 17

Employment Law & HR Practices

LEVEL Intermediate to Advanced

Prerequisite

Some human resources experience and planning responsibility within your organization.

Overview

The employment relationship is founded on principles of contract law and is considered by the courts to be a special kind of contract. Participants will gain a practical perspective concerning the relationship between the legal landscape for (mostly non-union) employment in Canada, and day-to-day human resources activities that impact their organization.

Applicable for

Business owners, and those who advise business owners, senior managers, CFOs, and controllers who are responsible for human resources issues in the workplace.

Content

In this session, you will learn about

- issues surrounding the hiring, maintaining and dismissal of employees, based on the employment contract
- the Canadian legal culture of employment
- the nature of employment
- common law vs. Employment Standards
- the value of written contracts
- privacy
- the basics of hiring and other human resources practices
- the theory of "notice"
- constructive dismissal

Seminar Material Format

Paperless materials only.

Seminar Leader

Gavin Marshall, BA (Hons), LL.B.

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

Employment Standards Overview

LEVEL Introductory

Prerequisite

None.

Overview

This seminar provides an overview introduction to key provisions of the BC Employment Standards Act ("ESA"), with emphasis on commonly misunderstood requirements.

Participants will have the opportunity to ask real-life questions and will receive a handout summarizing seminar content.

Applicable for

Individuals and managers who have payroll, human resources, or people management responsibilities.

Content

In this session, you will learn

- essential ESA compliance requirements, and how to formulate solutions
- potential ESA liabilities to contractors
- overtime entitlements and the scope of exclusions e.g. "managers"
- statutory holiday pay requirements
- wage and severance liability on sale/transfer of a business
- maternity/parental leave obligations, including the duty to reinstate
- vacation accrual rules, including vacation pay on non-base pay
- ESA termination provisions and how they relate to other termination liabilities

The seminar will also cover any proposed or passed amendments to the ESA at the time of presentation.

Seminar Material Format

Paperless materials only.

Seminar Leader

J. Geoffrey Howard, LL.B.

Fee $225 **PD Passport Valid - 1/2 Passport Day** **3.5 Eligible CPD Hours**

Advisory: There will be audio recording at this session

Leading Strategy into Action

LEVEL Intermediate

Prerequisite

None.

Overview

In the day-to-day activity of running a business, leaders and managers often overlook the importance of a clearly defined and executable strategy as a critical component to business success. The workshop provides tools and techniques to help communicate the key strategic imperatives of a business, align daily decisions with business strategy, examine the repercussions of failing to follow the strategy and explore the link between strategy implementation and the overall success of a business. The Strategic Leadership Process - a framework for leading strategy into action - is introduced. A Strategic Implementation Plan will be developed.

Applicable for

Leaders and managers who want to learn how to link leadership "best practice" to the successful implementation of business strategy.

Content

In this seminar, you will learn

- define the strategic imperative of their business and align local business unit/department
- strategy with business strategy
- assess the impact of management decisions on value disciplines
- align strategy with business 'core values'
- align work environment, talent, management practices and business interactions with strategy
- implement the strategic leadership process
- facilitate change in practices and in business structure that best support the strategy
- understand the inter-relationship between leadership and strategy implementation
- enable people to support the business strategy

Seminar Material Format

Paperless materials only.

Seminar Leader

Dr. Shawn Ireland, Ph.D.

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

Public Sector & Not-for-Profit Sector Performance Management

LEVEL Intermediate

Prerequisite

Some working knowledge of strategy is preferred but not mandatory.

Overview

This seminar is designed to introduce the concepts of the performance measurement and management including, logic models, performance measurement frameworks and leading and lagging indicators. The session uses lecture, discussion and breakout sessions show how to apply the performance measurement and achievement in practical ways.

Public sector and not for profit organizations want to use performance management to better understand how their organizations can better deliver on their mandates. Using traditional financial indicators does not give management a complete picture of what's happening. For most organizations, performance measurement and management is critical to the success of their strategic plans, however there are typically the least well articulate part of the plan.

By the end of this seminar, participants will be able to

- understand the concepts of the use of logic models in the public sector
- translate high level outcome measures into actionable, controllable operational measures

Applicable for

The seminar is intended for financial and operational managers in the public and not for profit sector who want to expand their understanding of performance measurement and management.

Content

Our discussions will look at the environmental, both internal and external factors affecting and impacting performance measurement and management execution. This course teaches you how to align how to construct models and select frameworks to execute your organizational Vision and Mission Statement and your key strategic objectives.

Seminar Material Format

Paperless materials only.

Seminar Leader

Bruce Acton, B.Sc., M.B.A., F.C.M.C

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

For dates, times and venues – see page 17

Strategic HR Planning

LEVEL Intermediate

Prerequisite

Some working knowledge of strategy development is desirable but not mandatory.

Overview

Strategic Human Resource planning establishes a strategic framework for human resource success in a realistic and effective manner. This full day seminar will discuss the contemporary theories, and concepts of HR Strategic Management and Planning.

This course will teach you how to align HR strategic initiatives with the organizational Vision and Mission Statement and your key strategic objectives.

By the end of the seminar, participants will be able to

- how to identify and set HR strategies and goals
- understanding and aligning Human Resources programs and processes
- development of a HR action plan

Applicable for

Senior managers seeking a greater understanding of HR management, how to identify improvement opportunities and apply HR strategies skills to improve their organization.

Content

Participants will learn how to translate strategic business goals into a concrete HR plan, supporting business goals and processes such as attraction and retention, and rewards and recognition.

Seminar Material Format

Paperless material only.

Seminar Leader

Bruce Acton, B.Sc., M.B.A., F.C.M.C

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

Understanding the Financial Risks of Employee Benefits

LEVEL Intermediate

Prerequisite

None.

Overview

Costs related to employee benefits programs are a significant and growing cost for businesses. CFOs are increasingly recognizing the financial risks related to employee benefits but they also recognize that the area is not well understood nor is it strategically managed. While annual inflation rates for employee benefits have been somewhat muted over the last couple of years, that is all about to change with double-digit inflation a strong likelihood in the near future.

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. Through a combination of lecture and interactive discussions, this seminar will help participants better understand the area of employee benefits, the key cost drivers and future trends impacting benefits, and strategies to better manage them.

Applicable for

Intermediate and senior financial leaders who have Human Resources reporting to them or who are broadly responsible for organizational cost management.

Content

- discuss CFO perspective on employee benefits
- assess why organizations provide employee benefits
- review underlying trends in employee benefits
- present proactive strategies to help ensure that these programs are cost-effective, sustainable in the
- long term, and relevant to employees

Seminar Material Format

Paperless materials only.

Seminar Leader

Dan Eisner, CPA, CA

Fee $225 | **PD Passport Valid – 1/2 Passport Day** | **3.5 Eligible CPD Hours**

CPABC
Certificate Programs

Strategic Management Certificate Program

CPABC is pleased to present the Strategic Management Certificate Program. This four-part program focuses specifically on the critical components of leadership and strategy.

The four modules are:
Strategic Planning
Risk Management and Governance
Team Development
Change Management

Each module is eligible for 7 CPD Hours. In order to qualify for the certificate, members are required to complete all four modules. Modules do not need to be taken in order.

See next page for description of each session.

Overview

The program allows participants to acquire substantive knowledge in these core business topics. At the end of the program, 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.

Applicable 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.

Seminar Leader to be drawn from

Mia Maki, BA, MBA, FCPA, FCMA
Barbara VanDerLinden, FCPA, FCMA

SEMINAR MATERIAL: PAPERLESS | OPTIONAL: LAPTOP

Strategic Planning

This interactive session will use case examples to examine the link between stated organizational goals, the business environment and visible strategies, with focus on the functional strategy level. You will gain an appreciation of the tools used to develop and execute successful strategies. You will also examine the strategies of your own organization relative to the competitive landscape. Exercises will provide opportunities to consider your own role relative to strategy formulation, execution and monitoring, and highlight opportunities to increase personal effectiveness.

Content

In this session, you will learn

- how organizations spot strategic opportunities and threats
- tools and processes for strategic planning used by leading companies
- effective practices for successful strategy execution throughout your organization
- opportunities to increase personal effectiveness in supporting your organization's strategy

Fee $450 **PD Passport Valid – 1 Passport Day** **7 Eligible CPD Hours**

SEMINAR MATERIAL: PAPERLESS | OPTIONAL: LAPTOP

Risk Management and Planning

This interactive session will examine different types of risks which can undermine the achievement of an organization's objectives, and the management approaches and tools used to manage them. You will examine the risk management policies, practices, and reporting used by leading organizations, assess your organization's approach to risk and consider your own role in this process. We will also overview director and board responsibilities and take an in-depth look at governance practices, with focus on not for profits, where many CPAs serve as volunteer directors. You will gain an appreciation of how these requirements link to your own role. This session is a must for members considering serving as directors, now or in the future.

Content

In this session, you will learn

- how to spot and assess a wide variety of risks
- tools and techniques for reducing the impact of risks on your organization
- how to implement risk reporting tools
- what are governance responsibilities and current practices
- how board structures and processes can help boards and directors perform
- how to increase your effectiveness in supporting risk management and governance in your organization

Fee $450 **PD Passport Valid – 1 Passport Day** **7 Eligible CPD Hours**

SEMINAR MATERIAL PAPERLESS OPTIONAL LAPTOP

Team Development

Today's complex problems require the skills of diverse teams, and effective team performance is essential to success. This interactive session will provide participants with an in-depth understanding of factors impacting team effectiveness, including team design, stages of team development, and ingredients necessary for achieving results. Through experiential exercises, you will gain a greater appreciation of how team norms, internal team factors and communication patterns can enhance or hinder team performance and to understand the characteristics of successful teams. Small group and individual work will provide an opportunity to sharpen your teaming skills, to consider how personalities and your own personal style impact on team performance, and how you can support a team as a leader.

Content

In this session, you will learn

- the stages of team development
- how important it is to effectively design a team
- factors necessary for team success
- how to coach teams for increased effectiveness
- common norms of well-performing teams
- how communication patterns affect team results

Fee $450 **PD Passport Valid – 1 Passport Day** **7 Eligible CPD Hours**

SEMINAR MATERIAL PAPERLESS OPTIONAL LAPTOP

Change Management

Why do most change initiatives fail? And why are some organizations good at 'change'? In a world where change is an imperative, this interactive session will focus on how organizations can improve the odds and how your leadership can support successful change. Participants will learn how organizational and human dynamics impact change initiatives, how to plan for change and will examine the main ingredients necessary for successful implementation. You will increase your understanding of reasons for resistance and how to win support. Interactive exercises will provide practice in change planning and implementation, and case studies will enhance your understanding of the 'art' of change.

Content

In this session, you will learn

- how to increase awareness and the impact organizational and human dynamics have on change initiatives
- the main steps in a change management process
- the importance of detailed and realistic transition plans
- how to increase the probability of successful change implementation

Fee $450 **PD Passport Valid – 1 Passport Day** **7 Eligible CPD Hours**

CPABC Certificate Programs

Advanced Strategic Management Certificate Program

The Advanced Strategic Management Certificate Program is a two-day program focused on integrating frameworks and strategic plan implementation, through the application of critical components of leadership and strategy, covered in the Strategic Management Certificate Program. 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. Completion of the Strategic Management Certificate Program is not a pre-requisite.

The two modules are:
Strategy: Maps
Strategy: Links

Each module is eligible for 7 CPD Hours and 1 Ethics Hour. In order to qualify for the certificate, members are required to complete all two modules. Modules do not need to be taken in order.

Overview

This program briefly reviews key content in the Strategic Management Certificate Program, and participants will demonstrate the ability to apply frameworks, best practices and models to different organizational scenarios, through case work and application to their organizations.

Applicable 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.

Seminar Leader to be drawn from

Mia Maki, BA, MBA, FCPA, FCMA
Barbara VanDerLinden, FCPA, FCMA

Strategy: Maps

In this session, participants will gain experience in strategy mapping and integration. One of the most difficult aspects of strategic planning is implementation, often because the organization overestimates its capacity to tackle several strategic initiatives. 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.

Content

The session includes case-based learning and application exercises that allow participants to start applying the best practices and strategy map to their organization's strategic plan, and optimize for success.

Fee $450 **PD Passport Valid – 1 Passport Day** **7 Eligible CPD Hours**

Strategy: Links

This case-based, interactive session takes participants through a process of analysis and review, allowing a big picture perspective, balanced with emphasis of key details and the importance of making hard choices throughout the process. A comprehensive framework for strategic planning "Links", including implementation and monitoring, will be introduced and applied, giving participants a framework and the analysis tools used to make decisions and populate the framework.

Content

The session includes case-based learning and application exercises that allow participants to start applying the best practices and Links model to their organization's strategic plan, and optimize for success.

Fee $450 **PD Passport Valid – 1 Passport Day** **7 Eligible CPD Hours**

For dates, times and venues – see page 17

Taxation

Advanced Tax Planning for Business Succession

LEVEL Intermediate to Advanced

Prerequisite

This course is presented at an intermediate to advanced level, with the assumption that participants will have sufficient basic knowledge and experience in the areas of private company tax planning and transactions involving private company shares.

Overview

This seminar is designed to assist experienced tax practitioners in planning for owner-manager/private company business succession. The course 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 enterprises.

Course Description

Business succession involving closely-held private enterprises can range from an intra-family estate plan to an arm's length sale of shares. This seminar will provide practical knowledge of the principal business succession considerations. The focus will be on income tax considerations, although key non-tax issues will also be identified. This seminar is designed to provide the knowledge and tools necessary to identify, plan and manage business succession considerations for owner-managers of private enterprises through various phases of a business life cycle.

Applicable for

This seminar will be useful to accountants in public practice with clients who are owner-managers of private corporations, as well as in-house professionals of private enterprises, especially those facing succession issues.

Content

- general tax and non-tax considerations related to business succession and estate planning for owner/managers.
- understanding the 'Wealth Cycle' of an owner/manager's private enterprise
- estate freeze techniques and common corporate tax-deferred rollovers
- impact of the new "TOSI" and 'passive income rules' for private companies on business succession and the use of the small business deduction
- divisive reorganizations (related party and unrelated party butterflies)
- arm's length and non-arm's length divestiture planning
- capital gains exemption planning and 'purification' techniques
- post-mortem planning techniques

Seminar Material Format

Paperless materials. Print copy option available for $20.

Seminar Leaders

Asif Abdulla, JD
Alvin Lun, JD
Shawn Tryon, LL.B.

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

Canadian Capital Additions and CCA – The Latest

LEVEL Intermediate

Prerequisite

A basic knowledge of income tax, particularly as it relates to capital cost allowance (CCA) and automobile benefits.

Overview

This course will provide an update on the rules and new income tax provisions as they relate to capital additions and CCA, including discussions related to current planning trends and risks, and the impact of the new rules on acquisition planning.

At the completion of the course attendees should have a complete working knowledge of the new capital addition and CCA rules, and a refreshed understanding of the rules and planning opportunities and risks related to automobiles/passenger vehicles, standby charges and personal assets bought through a corporation.

Applicable for

Anyone involved in the capital acquisition process as well as the preparation and planning of same as it relates to income tax filings.

Content

- new CCA rules as introduced in the November 2018 Economic Update as they pertain to manufacturing & processing assets, general asset acquisitions and CDE and COGPE. Effective dates and capital acquisition planning considerations
- discussion related to the passenger vehicle/automobile distinction and the importance thereof
- limitations on passenger vehicles
- automobile standby charges and planning considerations related thereto
- new zero-emission vehicle provisions
- The new eligible capital property rules
- CCA and rental properties and the consequences of claiming CCA thereon, the consequences of not claiming the maximum CCA in any year and the ability to amend a past claim
- assets bought in a company but primarily for personal purposes and the tax consequences thereof, the calculation of personal benefit provisions, and the impact of Ss. 15(1) in light of the Laliberte case

Seminar Material Format

Paperless materials only.

Seminar Leader

Mark Ostry, CPA, CGA

Fee $130 | **PD Passport Valid – 1/3 Passport Day** | **2 Eligible CPD Hours**

Corporate Restructuring - Fundamentals

LEVEL Intermediate

Prerequisite

Participants should be familiar with the existing tax rules in the ITA.

Overview

This full-day seminar highlights the fundamental income tax considerations that arise in corporate reorganizations, including a discussion of related provisions and key pitfalls to avoid. The seminar will use extensive examples to illustrate tips and traps to be aware of when initiating a corporate reorganization.

Course Description

Your or your client's business and personal situation is constantly changing. The existing business structure may no longer be suitable or ideal and you are seeking tax-efficient alternatives. There are a number of corporate reorganization alternatives that can be implemented under the Income Tax Act. Some of the provisions are complex and often interact with related provisions or anti-avoidance provisions. It is common for the shares and debt of corporates to be transferred between taxpayers and entities to be combined for both tax and non-tax reasons.

This course will provide participants with a summary of the tools available to effect these transfers or mergers in a tax efficient manner. The course also considers the traps and anti-avoidance rules to consider when entering into such transactions.

Applicable for

Practitioners or financial executives in industry who have some, but not extensive, experience in share/debt reorganizations, consolidations, wind-ups and amalgamations and the GAAR. Participants should take this course if they are involved in corporate reorganizations and want a more in depth understanding of the relevant Canadian income tax provisions to consider.

Content

- tax-deferred rollovers (other than Section 85)
- wind-ups
- amalgamations
- share exchanges and reorganizations
- anti-avoidance provisions
- divisive reorganizations

Seminar Material Format

Paperless materials. Print copy option available for $20.

Seminar Leaders

Mike Coburn, BA(Hon), LL.B.
Shane Onufrechuk, FCPA, FCA

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

For dates, times and venues – see page 17

Corporate Tax – Investment Holding Companies

LEVEL Intermediate to Advanced

Prerequisite

A basic understanding of corporate taxation.

Overview

The taxation of investment holding corporations have 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?

Course Description

Using examples, this course will provide detailed coverage of the significant changes to the taxation of investment holding corporations and their impact, including the introduction of the passive income rules (which can impact the availability of the small business deduction of any associated corporations), the change in the RDTOH rules resulting in two pots of refundable tax, and the general increase in the tax rate for corporate investment income. Planning considerations will also be addressed, including the advantages that may still be provided by using an investment holding corporation, and the implications for winding up or maintaining an existing investment holding corporation.

Applicable for

Experience with taxation issues of private companies and familiarity with ITA.

Content

- advantages of an investment holding corporation – when to implement
- integration, tax rates, and related issues
- income splitting and estate freezes – possible with an investment holding corporation?
- the passive income rules
- RDTOH – eligible and non-eligible pots and dividends
- existing investment holding corporations – wind up or retain?

Seminar Material Format

Paperless materials. Print copy option available for $20.

Seminar Leader

Chris Ireland, B.Comm, CPA, CA, TEP

Fee $225 **PD Passport Valid – 1/2 Passport Day** **3.5 Eligible CPD Hours**

Corporate Tax – RDTOH, CDA & Other Tax Accounts

LEVEL Intermediate

Prerequisite

Participants should be familiar with the existing tax rules in the ITA.

Overview

With the addition of the eligible RDTOH account in 2019 to the existing Eligible Dividend regime and changing tax rates for eligible and ineligible dividends, tax planners are confronted with a multitude of tax accounts that need to be considered in conjunction with each other. This seminar will provide a detailed review of the key tax accounts for private corporations and tax planning where multiple tax accounts can either be used or impacted. The seminar also includes a series of mini-cases that demonstrate the issues that need to be evaluated when dealing with these accounts.

Course Description

Integration is an important part of Canada's Income tax system for private corporations and the notional tax pools reviewed in this course are an important part of integration. This course will provide a common framework for considering GRIP, the three RDTOH pools, LRIP and CDA. The focus of this course is applying an understanding of these pools to effective tax planning.

Applicable for

Professionals involved in tax planning for privately held companies and their shareholders.

Content

- basic considerations for all tax accounts
- GRIP
- RDTOH
- LRIP
- CDA
- review questions

Seminar Material Format

Paperless materials. Print copy option available for $20.

Seminar Leaders

Sandy Stedman, CPA, CA
Mike Stubbing, CPA, CA, CFP, TEP

Fee $225 **PD Passport Valid – 1/2 Passport Day** **3.5 Eligible CPD Hours**

Corporate Tax – Review of Tax Planning

LEVEL Intermediate

Prerequisite

Corporate Tax - Tax Return Updates, Compliance, and Planning, or equivalent working experience with the preparation of corporate tax returns and some tax planning experience.

Overview

This two-day seminar is designed for those who desire to update and refresh their knowledge in both technical and tax planning issues for corporations. Although taxation of both public and private corporations is reviewed, the primary focus is on the taxation of private companies.

Course Description

This course is being offered to provide a "refresher" overview of tax issues relating to corporate tax payers. Participants will work through case studies covering a wide range of corporate tax issues, collaborate with their peers and have an opportunity to share issues that have been impacting their clients.

Applicable for

Those involved in corporate tax matters for private corporations who desire to expand or refresh their knowledge of corporate tax.

Content

- organization of the Tax Act as it relates to corporations
- determination of residency
- various income items and deductions not commonly seen
- calculation of corporate taxes
- common definitions under the Income Tax Act that impact a corporate taxpayer, including related parties, affiliated parties, and associated corporations
- various sources of income, including active business income, investment income, specified investment business and personal service businesses.
- commonly used corporate reorganization provisions: the use of the Section 85 rollover; Section 86 capital reorganization; Section 87 amalgamation; Section 88 wind-up
- Section 84.1 and Section 55(2) anti-avoidance provisions
- corporate attribution
- loss utilization
- owner manager remuneration planning
- estate planning
- issues for buy-sell agreements and purchase and sale of business
- acquisition of control
- debt forgiveness

Seminar Material Format

Paperless materials. Print copy option available for $20.

Seminar Leader

Andrew Taylor, CPA, CA

Fee $785 | PD Passport Valid - 2 Passport Days | 14 Eligible CPD Hours

Corporate Tax – Section 55: How Safe Are Your Dividends?

LEVEL Intermediate

Prerequisite

Participants should be familiar with the existing tax rules in the ITA.

Overview

The rules in Section 55 can convert a tax free inter-corporate dividend to a capital gain. Before April 20, 2015 the anti-avoidance rules in Section 55 were rarely considered in private corporate tax planning. After April 20, 2015 practitioners need to consider Section 55 on all intercorporate dividends to avoid unexpected tax. This seminar provides participants with a basic understanding of the application of these rules to private corporations.

Course Description

The longstanding rules in section 55 of the Income Tax Act were significantly amended in April of 2015, with the result that they apply to many more inter-corporate dividends than previously. In addition, the "exceptions" to avoid of the application of these rules have been severely curtailed. The broad manner in which these rules are written, along with the Canada Revenue Agency's evolving interpretation of these rules, creates difficulty in understanding how and when to apply them, both in theory and in practice. This course intends to provide a basis for better understanding these rules and their application.

Applicable for

General practitioners at any level and tax specialists at the start of their career or looking for a refresher on the rules in Section 55. This seminar deals solely with private corporations and would not be of interest to practitioners or advisors whose practice does not include private corporations.

Content

- the reason for these rules
- the purpose test
- the exemptions that remain relevant to private corporations
- the calculation of safe income on hand
- the allocation of safe income on hand to the issued shares
- review questions
- CRA statements and administrative policies in respect to the application of these rules

Seminar Material Format

Paperless materials. Print copy option available for $20.

Seminar Leaders

Sandy Stedman, CPA, CA
Mike Stubbing, CPA, CA, CFP, TEP

Fee $225 | PD Passport Valid – 1/2 Passport Day | 3.5 Eligible CPD Hours

For dates, times and venues – see page 17

CRA Business Audits and Settlement Strategies

LEVEL Intermediate

Prerequisite

Familiarity with the existing tax rules in the ITA.

Overview

This session will introduce you to the CRA's income tax dispute resolution process by providing an understanding of the appropriate steps required to obtain cost-effective and efficient resolution of tax disputes. Topics include: current audit issues, strategies for winning tax disputes and settlements, dealing with the audit division and CRA's powers of inspection, what to do when CRA comes calling, the reassessment stage, and notices of objection.

Applicable for

Those who deal with the CRA in tax audits, whether on an infrequent or regular basis.

Content

- current business audit issues and areas of CRA audit focus
- what to expect from a CRA audit, including taxpayer advisors' rights and obligations and CRA's Code of Conduct
- stages of a CRA audit and how to respond to each
- strategies for achieving positive audit settlement outcomes

Seminar Material Format

Paperless materials. Print copy option available for $20.

Seminar Leader

Ed Kroft, QC, CPA (Hon.)

Fee $130 PD Passport Valid – 1/3 Passport Day 2 Eligible CPD Hours

Creative Use of Partnerships in Tax Planning

LEVEL Intermediate

Prerequisite

None.

Overview

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

Applicable for

All members will benefit from a greater understanding of the use of partnerships, and particularly members involved in the real estate industry, mergers and acquisitions, estate planning and tax planning in general.

Content

- distinguishing partnerships from joint ventures, and characteristics of different types of partnerships
- structuring partnerships including profit and loss allocations and cash distributions
- using partnerships in creative tax planning, including: the deferral of gain recognition in real estate development; to maximize CCA claims; as an alternative to corporate estate freezes; to preserve or enhance interest deductibility; and to utilize cost base bumps in acquisitions
- overcoming common tax problems in partnership structures
- at risk rules, limited recourse rules, section 103 reallocations, anti-deferral rules, GAAR and other anti-avoidance provisions
- recent developments in relevant case law

Seminar Material Format

Paperless materials only.

Seminar Leader

John Gregory, LL.B.

Fee $225 PD Passport Valid – 1/2 Passport Day 3.5 Eligible CPD Hours

Advisory: There will be audio recording at this session

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

LEVEL Intermediate

Prerequisite

None.

Overview

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

Applicable for

Employers and independent contractors who would like to better understand their options, the legal ramifications of these options and the tax planning opportunities associated with these options.

Content

- the legal test of status
- the tax implications of status (CRA, EI, CPP, Payroll, GST, Income Tax)
- tax advantages of incorporated employees/independent contractors
- other tax motivated structuring options
- other legal implications of status (vicarious liability, WCB, employment standards, human rights, intellectual property, fiduciary duty)
- when to hire an employee
- when to retain a contractor
- use of written contracts to minimize liability in employment or independent contractor relationships, including key terms

Seminar Material Format

Paperless materials only.

Seminar Leaders

Shane Onufrechuk, FCPA, FCA
Richard Press, LL.B.

Fee $130 **PD Passport Valid – 1/3 Passport Day** **2 Eligible CPD Hours**

Advisory: There will be audio recording at this session

Ethical Tax

LEVEL Introductory

Prerequisite

None.

Overview

Tax is seldom black or white. In this interactive session, case studies will be used to provoke discussion on ethical dilemmas related to tax matters confronting accountants.

Applicable for

Professional accountants who have responsibility for tax compliance, decision-making and/or provision of tax advice.

Content

In this session you will learn how to

- recognize and handle a variety of ethical tax scenarios
- foster and promote ethical behaviour in the profession
- work through case studies from public practice and industry

Seminar Material Format

Paperless materials only.

Ethics Content

This seminar is eligible for 2 hours of ethics content.

Seminar Leaders

Mike Coburn, BA (Hon), LL.B.
Shane Onufrechuk, FCPA, FCA

Fee $130 **PD Passport Valid – 1/3 Passport Day** **2 Eligible CPD Hours**

For dates, times and venues – see page 17

Income Tax – Principal Residences

LEVEL Intermediate

Prerequisite

Knowledge of the *Income Tax Act*.

Overview

Many Canadians own a principal residence, but the tax implications of transactions involving principal residences are not always well known or fully understood. This course will examine all aspects of principal residences from a Federal tax perspective, including situations that are unusual and can give rise to unexpected issues or outcomes.

Course Description

This course covers the wide variety of Federal tax issues that can arise regarding principal residences. This includes the requirements for a property to be classified as a principal residence, ownership (including bare trustees), the "ordinarily inhabited" requirement, and housing units on multiple or large properties. Other topics to be addressed include income earned from a principal residence and the concept of "incidental income", change-in-use rules and partial dispositions or residences held through trusts.

Applicable for

Anyone who owns a principal residence, and financial professionals who provide advice to owners.

Content

- the requirement that a principal residence by capital property (and the implications to house flippers) including the doctrine of secondary intention.
- what is considered a "housing unit" including trailers and houseboats
- who owns the property including bare trustees
- what conditions meet the "ordinarily inhabited" rule including situations where taxpayers have moved into care facilities.
- how a property is designated as a principal residence the mechanics of the principal residence formula
- situations where properties are used to earn income and the concept of "incidental income"
- housing units on multiple properties and properties in excess of ½ an hectare.
- partial dispositions of a property (including prior subdivisions)
- the change-in-use rules and elections to avoid the change in use rules and the implications of filing these elections
- residences held through trusts and the impact of the October 2016 legislative amendments.
- the impact of separation and divorce on the principal residence exemption.

Seminar Material Format

Paperless materials. Print copy option available for $20.

Seminar Leader

Hugh Woolley, CPA, CA

Fee $225 | **PD Passport Valid – 1/2 Passport Day** | **3.5 Eligible CPD Hours**

Income Tax – Real Estate

LEVEL Intermediate

Prerequisite

Participants should be familiar with the existing tax rules in the ITA.

Overview

This seminar identifies and reviews significant income taxation issues arising in various aspects of real estate activities, and includes practical, business-focused comments on dealing with them.

Course Description

Starting with a review of the structures available to undertake real estate transactions, this course follows with a detailed look at income tax issues arising on the acquisition, development, holding and then disposition of Canadian real estate. Some coverage of provincial tax issues involving real estate will be included. While a brief overview of GST, HST and provincial tax issues is undertaken, participants should be aware that due to its emphasis on income taxes, this seminar does not provide a detailed or complete discussion of the impact of indirect taxes on real estate.

Applicable for

Practitioners and members in industry who need to be aware of and/or work with income taxation issues arising in real estate transactions. Individuals seeking in-depth coverage of real estate GST/HST topics should consider attending the seminar *GST/HST – Real Property*.

Content

- various structures for the ownership of real estate and its acquisition
- cost of acquiring and holding & developing real estate
- issues surrounding the disposition of real estate
- corporate reorganizations involving real estate
- provincial tax issues involving real estate

Seminar Material Format

Paperless materials. Print copy option available for $20.

Seminar Leader

Hugh Woolley, CPA, CA

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

Life-Interest Trusts as Will Substitutes: The Use and Taxation of Alter Ego Trusts and Joint Spousal or Common-Law Partner Trusts

LEVEL Intermediate

Prerequisite

None.

Overview

This half-day seminar will review the requirements for, and applications of, spousal trusts, joint spousal and common-law partner trusts, alter ego trusts and protective trusts with special emphasis on why their use is so prevalent in British Columbia. In addition, the seminar will review how the rules relating to these special types of trusts intersect with other rules in the Income Tax Act focusing on potential problems and opportunities associated with using these special types of trusts.

Applicable for

Practitioners who advise clients on trust and estate planning issues.

Content

This seminar will review the requirements for, and applications of, spousal trusts, joint spousal and common-law partner trusts, alter ego trusts and protective trusts.

Examples will demonstrate the usefulness of these trusts in tax and estate planning and review some of the pitfalls associated with using these trusts.

The seminar will review the recent British Columbia case law on attempts to challenge the use of joint spousal and common-law partner trusts and alter ego trusts to avoid the Wills Variation Act.

Seminar Material Format

Paperless materials only.

Seminar Leader

David Thompson, B.Comm., LL.B., TEP

Fee $225 **PD Passport Valid – 1/2 Passport Day** **3.5 Eligible CPD Hours**

Personal Tax – Review of Tax Planning

LEVEL Intermediate

Prerequisite

Personal Tax - Tax Return Updates, Compliance, and Planning, or equivalent working experience in preparing personal tax returns and planning for clients.

Overview

This two-day seminar is designed for those who desire to update and refresh their knowledge in both technical and tax planning issues for individuals, trusts and partnerships. Although the taxation for trust and partnerships is reviewed, the primary focus is on the taxation of individuals.

Course Description

This course is being offered to provide a "refresher" overview of tax issues relating to personal tax payers. Detailed reference materials, covering a broad range of income tax topics for use in answering tax related issues will be provided. Participants will work through case studies covering a wide range of personal tax issues, collaborate with their peers and have an opportunity to share issues that have been impacting their clients.

Applicable for

Those involved in personal tax matters who wish to expand or refresh their knowledge in the area of personal tax.

Content

- how to research a tax issue
- determination of residency
- liability for taxes in Canada
- administrative issues
- employment income/benefits and related deductions
- calculations of the various sources of investments income
- taxation of capital gains
- capital losses and the impact of the stop loss rules
- allowable business investment losses
- attributions rules
- registered retirement pension plans
- RRSPs/individual pension plans
- deferred plans such as TFSA, RESP and RDSP
- rental and farm income
- treatment of shareholder loans
- various deductions from net income such as the capital gains exemption
- calculation of taxes payable, including discussions on tax credits
- taxation of partnerships
- death of a taxpayer
- taxation of family trusts

Seminar Material Format

Paperless materials. Print copy option available for $20.

Seminar Leader

Mark Ostry, CPA, CGA

Fee $785 **PD Passport Valid - 2 Passport Days** **14 Eligible CPD Hours**

For dates, times and venues – see page 17

RIP – Estate Planning

LEVEL Advanced

Prerequisite

Participants should have experience in the area of domestic estate planning and a good understanding of the testamentary tax rules. Suggested prerequisite seminars are *RIP – Estate and Testamentary Trust Returns* and *RIP – Terminal Filing*.

Overview

This seminar will provide a detailed review of important estate planning matters for practitioners who deal with owner-manager or high net worth clients.

Course Description

This course includes enhanced estate planning skills for the non-specialist practitioner, an introduction of important tax and estate planning concepts, and useful tips and an up-to-date reference source. Participants will develop a working understanding of how to initiate and undertake effective estate planning for clients. An important area of the seminar is to maintain flexibility in the estate plan while managing estate planning risk.

By attending this seminar, participants will be able to

- identify significant issues relating to estate planning and the use of trusts
- analyze post-mortem planning alternatives in the context of fact-specific scenarios
- explain the use of life insurance in estate and post-mortem planning
- identify U.S. estate tax issues

Applicable for

Practitioners who want to identify and address estate planning needs for the owner-manager or high net worth individual.

Content

- planning for deemed disposition at death
- planning and using trusts
- post-mortem planning
- the use of life insurance in planning
- a U.S. estate tax review
- the preparation and discussion practical examples through a case study

Seminar Material Format

Paperless materials. Print copy option available for $20.

Seminar Leaders

Yogesh Bhathella, CPA, CGA, CFP, TEP
Francis Wong, CPA, CA

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

Tax for Controllers

LEVEL Introductory

Prerequisite

None.

Overview

This seminar will help controllers of private companies stay current on a broad array of income tax, GST/HST and related compliance issues.

Course Description

This two-day course is compliance oriented with a high level review of a wide range of issues and focus on issue identification. GST/HST is covered at a basic level in the course. Industry specific items and all provincial taxes are beyond the scope of the course.

Applicable for

Anyone whose responsibilities include income tax, GST/HST, and related compliance and reporting issues, or practitioners who provide advice in these areas. Although the focus of the course is privately held companies, many of the topics covered could also be applicable to public companies.

Content

- HR – payroll, benefits, and employee vs independent contractor
- purchasing issues: limitations on deductions; GST/HST – get the ITC; purchases from non-residents
- domestic sales issues: GST/HST – registration, reporting periods, place of supply; bad debts
- sales to non-residents: export sales - GST/HST; Canada-U.S. Tax Treaty; automobiles: employees who require a car for their duties
- capital assets and real property: capital vs operating expense; purchase issues; CCA; GST/HST issues; change of use; dispositions.
- financing issues: expenses in respect to equity; interest and debt; lease vs. buy
- key items for CCPC income tax: a basic review of key small business deduction issues including; income tax filing requirements, due dates, and penalties
- related group issues: the key income tax relationships: related, associated, and affiliated; the key GST/HST relationships: closely connected and associated; shareholder agreements and related issues; domestic transfer pricing.
- alternative structures; corporations; partnerships; joint ventures; trusts; other requirements; GST returns; information returns; contractor reporting; partnership returns; collections and offsets

Ethics Content

This seminar is eligible for 0.5 hours of ethics content.

Seminar Material Format

Paperless materials. Print copy option available for $20.

Seminar Leader

Sandy Stedman, CPA, CA

Fee $785 **PD Passport Valid - 2 Passport Days** **14 Eligible CPD Hours**

US Corporate Tax - Fundamentals

LEVEL Introductory

Prerequisite

It will be beneficial for participants to have some understanding of Canadian tax principles.

Overview

This seminar will provide a general overview of the U.S. corporate taxation system, and discussion of how the Canada-United States Income Tax Convention (the "Treaty") provides certain protections to the Canadian enterprises. There will also be some discussion on how Canada will tax the Canadian enterprises on the repatriation of U.S. profits.

Course Description

This seminar will start with a high level overview of the U.S. Internal Revenue Code and how it imposes tax and filing requirements on U.S. and Canadian corporations. Participants will gain a basic understanding of how the Canada-United States Income Tax Convention interact with the Internal Revenue Code to provide reliefs to Canadian taxpayers. The seminar will also go into some details on the Canadian foreign affiliate rules and how cross-border corporate structures can be structured.

Applicable for

Practitioners and members in industry with limited prior exposure to U.S. taxation, who want to better understand U.S. corporation taxation issues and filing requirements, or who wish to provide basic taxation advice to clients expanding their businesses into the United States. This seminar is not intended for international or U.S. tax specialists who will be required to prepare complex U.S. corporate tax returns or provide in-depth advice to clients on U.S./international tax matters.

Content

- overview to the relevant law
- overview of treaty protection: Article V Permanent Establishment; Article VII Business Profits; withholding rates modification
- forms of doing business in the U.S.
- overview of the U.S. corporate tax return: Form 1120; Form 1120-F; Treaty Based Form 1120-F; filing deadlines; estimated tax requirements; non-compliant penalties
- case study: sample Treaty Based Form 1120-F
- computation of taxable income: basic revenue sourcing rules; basic revenue recognition procedures; common expenditures; basic depreciation calculations
- case study: sample Form 1120
- transactions between U.S. subsidiaries and Canadian shareholders
- overview of state and local taxation (limited scope)

Seminar Material Format

Paperless materials. Print copy option available for $20.

Seminar Leader

Terence Wong, CPA, CA, CPA (Illinois)

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

For dates, times and venues – see page 17

Wealth Management

Enough Bull: How to Retire Well Without the Stock Market

LEVEL Introductory

Prerequisite

None.

Overview

The stock market crash of 2008 has proven one thing: traditional retirement planning advice is way too risky. Trusting the stock market is like gambling with a family's future. But how does one plan for retirement without the possibility of losing up to 50 per cent of their investment value within a matter of months? The simple truth is that it is possible to retire financially well using guaranteed, safe fixed-income products like GICs that can never decline in value combined with government defined benefit pension plans including CPP and OAS. This course will detail the non-traditional view to money management that many investment advisors don't want to talk about.

Applicable for

Those interested in helping their friends, family and clients to retire well without having to take risks.

Content

- stock market versus GIC returns
- the laddered GIC strategy - explore a strategy of rolling over shorter term GICs to five-year GICs to maximize your retirement savings with zero risk
- CPP - when to elect to start receiving CPP (from age 60 to 70); we'll also analyze whether the CPP is a good investment
- can anything beat an RRSP - compare equity investing inside RRSPs vs outside in a regular investment account, TFSAs, rental properties, paying off debt, and retaining earnings in a corporation
- guide to investing - learn about the main investing options: mutual funds, a full-service broker, a discount broker and robo-advisors; calculate how much you'll pay in fees
- the "Tax Turbo-Charged RRSP" strategy - work through a spreadsheet to compare the traditional advice to invest in RRSPs early, to waiting until later in life, when all debt is gone
- deposit insurance – find out who insures your investments and what the limits are

Seminar Material Format

Paperless materials only.

Special Notes

This is a hands-on workshop. Though not mandatory, you are encouraged to bring a laptop to work along during the program on the spreadsheets including the "S&P TSX TR GIC RoR Calculator," "Investment Option Cost Analyzer," "RRSP vs OS vs TFSA," "RRSP vs Retaining Profits in Corporation," "Tax Turbo Charged RRSP Calculator" and the "Money Maximizer" to see if you are saving enough for retirement.

Seminar Leader

David Trahair, CPA, CA

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

Money, Love and the Law

LEVEL Introductory

Prerequisite

None.

Overview

In a new social reality our clients are not just divorcing but re-partnering again – often with the same disastrous financial (and emotional) results! The first line of defense in any scenario where the downside risk is a 50% reduction in wealth is to manage that risk. And yet, few couples will engage in the discussion and legal options available to avoid potentially disastrous outcomes. As aging couples re-partner, common misunderstandings are compounded by unequal net worth, children, step children, and estate planning considerations. Assumptions that today's couples are going to stay together forever is simply not supported in reality. Spousal relationships, co-habitation and marriage need to be examined in light of their financial and legal implications and not just within the romantic models we idealize and hope for.

Applicable for

Anyone who has clients who have changed marital status, or are contemplating partnering, or are in the midst of a change themselves.

Content

- new legal constructs under the Family Law Act (taught by a family lawyer)
- psychological factors influencing partnering behaviour
- structures for communication
- conflict resolution continuum and options available
- concepts of romantic relationships, social assumptions and misunderstandings
- the role of the financial professional in overseeing and supporting healthy and protective behaviours with their re-partnering clients

Seminar Material Format

Paperless materials only.

Seminar Leader

Tracy Theemes, MA, CFP, FCSI, FDS

Fee $225 **PD Passport Valid – 1/2 Passport Day** **3.5 Eligible CPD Hours**

Smoke and Mirrors: Financial Myths that will Ruin Your Retirement Dreams

LEVEL Introductory

Prerequisite

None.

Overview

There is a lot of confusion when it comes to retirement planning. How much will a family need to retire comfortably? Are RRSPs the best answer? Can the stock market be trusted? The standard answers from the "experts" include: start an RRSP early and maximize your contributions, use the stock market and mutual funds for the best returns, put faith in a financial adviser. But what if those answers are wrong? The problem is that much of the common advice is from people with a conflict of interest. Many are simply trying to sell financial products that make them money - at the client's expense. This course is designed to cut through the sales pitches and get to the simple truths.

Applicable for

Anyone who is interested in what they need to do to retire well, as well as practitioners who need a refresher on advising clients on retirement planning.

Content

- if I had $1,000,000 I could retire - why less than a million might be sufficient
- RRSPs are the holy grail of retirement - explore an alternate strategy that is guaranteed, has no-risk, and eliminates fees
- don't worry about your investments, you'll be fine in the long run - why you may not be making the eight to ten per cent a year they often talk about; what your adviser doesn't want you to know
- we have met the enemy, and he is the tax collector - why tax shelters may be sabotaging your personal finances when you think they are helping you reduce your taxes
- secure your financial future, buy life insurance - who really needs it, who doesn't, the perils of whole and universal life, how to get term life cheap; critical illness and long-term care insurance
- other subjects – mortgages; behavioural economics; car strategy

Seminar Material Format

Paperless materials only.

Special Notes

This is a hands-on workshop. Though not mandatory, you are encouraged to bring a laptop to work along during the program on spreadsheets including the "Retirement Optimizer" to calculate how much you'll need to retire, the "Personal Rate of Return Calculator" to see how well your investments have been doing and the "Car Lease vs Buy Analyzer" to help you optimize your car strategy. All spreadsheets are free with the course.

Seminar Leader

David Trahair, CPA, CA

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

For dates, times and venues – see page 18

The Procrastinator's Guide to Retirement

LEVEL Introductory

Prerequisite

None.

Overview

Let's face it, planning and saving for retirement is not easy. We are told that the earlier we start the better, and that the "magic of compounding" will make our dreams come true. But for most people it's simply not possible. In our twenties through our forties, we are busy paying for our housing, our cars, our kids and all the other costs of living. Out of necessity many of us become procrastinators when it comes to saving for retirement. But there is hope. This course will take you step-by-step though planning and saving for retirement starting in your 50s and the best way to fund your retirement years. It is an easy-to-follow plan for retirement in ten years or less.

Applicable for

Anyone approaching retirement who are starting late and wants to ensure it is comfortable and stress-free.

Content

- tracking your spending - the key step to retirement planning that most people don't do; learn how to do it easily, automatically and for free.
- optimize your retirement savings and drawdown strategy - work with a free easy-to-use Excel spreadsheet to optimize the use of excess cash and maximize your retirement income; your pre- and post-retirement investment strategy; why is exposure to equities during the drawdown phase so dangerous?
- retirement funding options - your CPP and OAS; how to calculate how much you'll get; your home as a source of funds
- RRIF versus annuity - how they work and the advantages and disadvantages of each; a suggested strategy and current annuity rates
- old age healthcare planning - what the government covers and what it doesn't; long-term care facility options
- other – death, taxes, and inheritance; your credit card strategy; divorce

Seminar Material Format

Paperless materials only.

Special Notes

This is a hands-on workshop. Although not mandatory, you are encouraged to bring a laptop to work along during the program on spreadsheets including the "The Procrastinator's Number Cruncher," "Estate Planning Record Keeper," "RRSP Needed for Mortgage," and the "RRSP vs Pay Down Debt" calculators.

Seminar Leader

David Trahair, CPA, CA

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

The Psychology of Investing

LEVEL Introductory

Prerequisite

None.

Overview

For decades controversy has raged in the world of behaviour and finance. Historically it was assumed that we approach our investing decisions with rationality but recent research has proven that emotions and behavioural biases, both conscious and unconscious are more at work than ever imagined. In this engaging and dynamic workshop we will address the empirical findings on investor behaviour and dig deeper into the thought processes at work in our own investing and financial lives.

Applicable for

Those who are managing their own investment behaviour and/or that of others.

Content

- history and background of theoretical models
- two system theory of decision making
- our obstacles to rational decision making
- choice architecture
- cognitive and emotional biases in behavioural finance
- defining risk
- steps to overcoming bias to improve investment outcome and irrationality

Seminar Material Format

Paperless materials only.

Seminar Leader

Tracy Theemes, MA, CFP, FCSI, FDS

Fee $225 | **PD Passport Valid – 1/2 Passport Day** | **3.5 Eligible CPD Hours**

The Simplest Personal Finance Strategy Ever

LEVEL Introductory

Prerequisite

None.

Overview

The previously accepted method of building wealth doesn't work anymore. The truth when it comes to personal finances is simple: People's quest to secure a comfortable retirement often ends up making them poor and others rich. The old way to get wealthy was to acquire assets like real estate, stocks and mutual funds using debt and then sit back and let time grow the net worth. But that strategy is deeply flawed and is going to send many people to the poor house. That's because it ignores the one basic principle that overrides any wealth-building strategy that anyone who is truly rich knows: What we should really be focused on is not getting rich, but plain old cash flow.

Applicable for

Anyone interested in helping their clients focus on what really matters – not building wealth, but ensuring cash flow.

Content

- the Cash Cow strategy - how to employ this simple strategy; identify your greatest source(s) of cash and make sure they keep on giving
- does money buy happiness - delve into the relationship; does a higher income make you happier; how changing your spending habits can improve your satisfaction level
- owning vs. renting - use the "House Rent versus Buy Analyzer" spreadsheet; the condominium conundrum, a primer on buying a condo as a first home or rental property and the extreme risks that exist
- mutual funds - how the sellers of mutual funds employ the Cash Cow Strategy to make themselves rich – at your expense
- CPP - how to calculate how much CPP pension you will receive, when to elect to start and what rate of return it provides using spreadsheets; history of CPPIB; enhancements to the CPP
- inflation – how the CPI index is measured; inflation, deflation, stagflation

Seminar Material Format

Paperless materials only.

Special Notes

This is a hands-on workshop. Although not mandatory, you are encouraged to bring a laptop to work along during the program on spreadsheets including the "House Rent versus Buy Analyzer," the "RRIF vs Annuity Calculator," the "CPP Retirement Pension Calculator," the "CPP Return Calculator," and the "CPP Elect Age Calculator."

Seminar Leader

David Trahair, CPA, CA

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

Unveiling the Retirement Myth

LEVEL Intermediate

Prerequisite

None.

Overview

As baby boomers approach retirement, we need to separate the myths from the facts. This interactive full-day seminar will provide a review of how to plan for retirement based on market history since 1900. Retirement issues such as risks of investing, sustainability of life-long income, optimum asset mix, inflation protection and potential conflict of interest with your financial adviser will be covered.

Applicable for

Members in industry and practitioners who are close to retirement, or those who advise on retirement planning.

Content

- basics of financial planning
- review and description of the pitfalls of current retirement planning methods
- market history and retirement, how luck effects your retirement, time value of fluctuations
- four warning signals of diminishing luck
- optimum asset allocation and rebalancing, different asset allocation strategies
- common myths and pitfalls perpetuated by the financial industry
- how much income is enough, how do you determine if savings are insufficient, sufficient or abundant
- how to use the market-history-based retirement calculator
- design your own case study: are you in the Green or Red Zone?

Seminar Material Format

Paperless materials only.

Seminar Leader

Jim Otar

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

For dates, times and venues – see page 18

CPABC
Nexus Days

PD NEXUS
Spring-Summer 2020 Conference Days

Conference-format seminars with multiple short sessions.

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.

Information Technology Insights 2020
June 18-19, 2020
Vancouver Convention Centre West
Live Stream option available

Business & Leadership Insights Vancouver
July 9, 2020
Vancouver Convention Centre West

Business Insights Victoria
July 14, 2020
Victoria Conference Centre

PD Nexus: Business Insights Victoria

LEVEL General

Prerequisite

None.

Overview

Don't miss this great opportunity to keep up with new developments in the ever-changing business environment. This fast paced conference style day will bring you technical updates in tax, insights into local business issues, and opportunities to develop new or deeper skills in leadership. In a combination of plenary and breakout sessions, you'll hear from subject matter experts and industry leaders who will help you learn, grow and develop as a business leader.

PD Nexus - bringing together knowledge, skills and business professionals. Don't miss this chance to network with your peers and return to your work inspired and with new knowledge and skills.

Applicable for

Professional accountants and other business professionals on Vancouver Island and beyond.

Content

The conference format day will include keynote presentations at the beginning and end of the day, with a choice of breakout sessions in between.

For detailed information on sessions and speakers, please watch for future flyers, emails, or check our website at pd.bccpca.ca.

Seminar Material Format

Paperless materials only.

Conference Speakers

Our speakers are experts in their fields, and are highly regarded professionals in the business and academic community. A complete list of conference speakers and their biographies will be available on our website at pd.bccpa.ca.

Fee $475 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

PD Nexus: Business & Leadership Insights Vancouver

LEVEL General

Prerequisite

None.

Overview

Our semi-annual PD Nexus: Business Insights Day in Vancouver is a great opportunity to keep up with new developments in the ever-changing business environment. Come obtain new skills and knowledge from a wide variety of presentations, including the ever-popular economic update and technical topics such as tax, data analytics and Anti-Money Laundering awareness, as well as sessions focusing on the challenges and opportunities of innovation and how to embrace change. This fast paced day will introduce you to new ideas, expand your knowledge and provide opportunities to network with your peers and develop as a business leader.

PD Nexus days bring together knowledge, skills and business professionals for a day of inspiring presentations, new tools and ideas and networking connections. PD Nexus days are passport eligible, and are a great opportunity to obtain CPD hours on timely and relevant topics for business leaders.

Applicable for

Professional accountants interested in business issues and other financial professionals in business and industry.

Content

The conference format day will include keynote presentations at the beginning and end of the day, with a choice of breakout sessions in between.

For detailed information on sessions and speakers, please watch for future flyers, emails, or check our website at pd.bccpca.ca.

Seminar Material Format

Paperless materials only.

Conference Speakers

Our speakers are experts in their fields, and are highly regarded professionals in the business and academic community. A complete list of conference speakers and their biographies will be available on our website at pd.bccpa.ca.

Fee $475 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

For dates, times and venues – see page 18

NOTABLE FORMAT — CONFERENCE DAY
SEMINAR MATERIAL — PAPERLESS
OPTIONAL — LAPTOP
AVAILABLE OPTION — LIVE STREAM

PD Nexus: Information Technology Insights 2020

LEVEL Introductory to Intermediate

Prerequisite

None.

Overview

This conference will benefit accounting professionals who need to keep current with the latest technologies, as well as determine what applications are worth implementing. It will offer practical technology topics designed to help alleviate heavy workloads of today's busy professionals.

Applicable for

Accounting professionals who need to keep current with the latest technologies, as well as determine what applications are worth implementing. It will offer practical technology topics designed to help alleviate heavy workloads of today's busy professionals.

Content

Day 1

General Session – Tech Update: A 2020 Vision

- AM Concurrent Sessions (choice of one)
  - Transforming Your CPA Firm
  - Mastering Advanced Excel Functions and Formulas
  - Integrating and Sharing Data
- PM Concurrent Sessions (choice of one)
  - Envisioning Your Midmarket Accounting Solution
  - Technoethics
  - Improving Productivity with Office 365 Cloud Applications

General Session – Current Tech Crimes - Ripped from the Headlines

Day 2

General Session – The Very Real Risk of Ransomware

- AM Concurrent Sessions (choice of one)
  - Profiting from Client Advisory Services
  - Advanced Topics in Power BI
  - Understanding Workflow and Automation Essentials
- PM1 Concurrent Sessions (choice of one)
  - Choosing Small Business Accounting Solutions
  - The Perfect Storm - Data Governance and Data Privacy Regulations
  - Emerging Technologies - 2020 and Beyond
- PM2 Concurrent Sessions (choice of one)
  - Enhancing Small Business Accounting with Add-ons
  - How's and Why's of Creating User Defined Functions in Excel
  - Implementing Security and Privacy Policies

General Session – Next Generation Excel Reporting

Seminar Material Format

Paperless materials only.

Conference Speakers

K2E Canada Inc

Fee $875 **PD Passport Valid - 2 Passport Days** **14 Eligible CPD Hours**

Upcoming PD Nexus Days

Upcoming PD Nexus Days for Fall/Winter

Estate Planning Insights

Nov 13, Vancouver Convention Centre West

Accounting, Assurance, and Taxation Insights

Nov 23, Vancouver Convention Centre West

Public Practice Insights and Tradeshow

Nov 24, Vancouver Convention Centre West

Business & Innovation Insights

Dec 4, Vancouver Convention Centre West

Moving You Forward

Discover how you can move yourself and your organization forward

Executive programs are multi-day, interactive, in-depth, and in-residence programs. The format is designed to increase the scope of your learning

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.

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

ENTERPRISE RISK MANAGEMENT FUNDAMENTALS

Geared towards financial professionals seeking knowledge in risk managment.

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.

THE OPTIMAL NEGOTIATOR

Geared towards professionals seeking negotiation mastery.

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

GOVERNING WITH INTENTION™

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

Governing with Intention™ is a standalone 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.

CFO'S PROGRAM

Geared towards aspiring and new CFOs

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

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

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.

THE CEO PROGRAM

Geared towards current and aspiring leaders.

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

The Controller's Management Program

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. The Controller's Management Program is designed to provide you with the theory, best practices, tools and skills to further sharpen your leadership and management skills. The program concentrates on four key leadership areas: Self-awareness and self-management; Organizational perspective and influence; Managing and leading others; Effective communication for a variety of contexts.

Who Should Attend

This program is for you if you are

- relatively new to a Controller or Financial Manager role
- aiming to move up to the Controller role from another position
- preparing to shift from a staff position or public practice into an industry management role
- looking to sharpen interpersonal and management skills

Special Features

- leadership assessments done prior to the program
- one-on-one coaching (on-site) – an opportunity to support the self-work with a professional Executive Coach to help establish personal and professional development goals

Faculty

Linda Lucas, CPA, CMA is Principal at Linda Lucas Consulting. Linda provides CEO, COO and CFO services to small- and medium-sized companies. She specializes in helping C-level executives and business owners identify and execute their strategic objectives, build strong teams and achieve operational excellence.

Lesley-Ann Marriott, CEC, PCC is a Certified Executive Coach who holds the advanced credential of Professional Certified Coach. Lesley-Ann has over 25 years of leadership and management experience.

The Program

This is an in-residence program, and unless the program is held in Vancouver, participants are encouraged to stay on-site. The program cost includes course materials and some meals. Accommodation is extra – please contact us for more information. The regular program fee is $3,150, but register at least two months prior to the offering date for an early bird discount of $300. ***Note: Executive Programs are PD Passport Invalid.***

Upcoming Dates

June 21-23, 2020	Location TBA, Vancouver
September 20-23, 2020	Westin Whistler Resort, Whistler

The Controller's Operational Skills Program

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. The Controller's Operational Skills Program is designed to enhance your role on the management team by sharpening your skills in risk management and controls, ethical leadership, planning, budgeting and forecasting, performance measurement approaches and financial reporting. You will explore ways to maximize the effectiveness of your accounting department through staffing and structure, policies and procedures, and process and quality management. You will gain insights into performance enablers for success, with a focus on information management and human resources management, and an eye towards trends in Controllership.

Who Should Attend

Are you responsible for management and financial reporting? Do you want to build upon your operational skills and knowledge of Controllership? Do you want to gain more confidence and be more effective in your role? If you answered "yes", and if you are either an aspiring Controller or an existing Controller, then this is the program for you.

Faculty

Mia Maki, BA, MBA, FCPA, FCMA, is faculty with the University of Victoria, Gustavson School of Business and Gill Graduate School, and is a consultant through Quimper Consulting Inc. Formerly Chief Financial Officer and Chief Operating Officer for a Victoria-based technology company, Mia has assisted in raising over $40 million in funds and in international initiatives including acquisitions (United States), strategic partnerships (Japan) and joint subsidiary creation (Europe).

The Program

This is an in-residence program, and unless the program is held in Vancouver, participants are encouraged to stay on-site. The program cost includes course materials and some meals. Accommodation is extra – please contact us for more information. The regular program fee is $3,150, but register at least two months prior to the offering date for an early bird discount of $300. ***Note: Executive Programs are PD Passport Invalid.***

Ethics Content

This seminar contains 4 hours of ethics content.

Upcoming Dates

May 20-23, 2020	Westin Whistler Resort, Whistler
July 8-10, 2020	Location TBA, Vancouver
September 16-19, 2020	Westin Whistler Resort, Whistler

The CFO's Leadership Program

The role of the Chief Financial Officer (CFO) 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.

The CFO's Leadership Program is an intensive and interactive program that blends best practices, case studies, group discussions and role-play to allow participants to advance their leadership skills to move from the technical aspects of being a finance professional, to being a strategic partner. This program concentrates on areas where CFOs have told us they feel they need the most help.

Who Should Attend

This program is for you if you

- direct, or wish to direct the finance and administration areas of your organization
- provide, or are seeking to position yourself as counsel to the CEO and the Board
- wish to expand your knowledge and develop your leadership skills as they apply to strategy execution and talent management in the finance and administration area
- want a unique opportunity to go beyond focusing on what you are doing as a leader to truly understand how you are being a leader

Faculty

Tammy Towill, MBA, FCPA, FCMA is a partner in the Cordura Group providing business and financial advisory services and related education and training programs to communities and organizations seeking growth or change. For over 20 years, Tammy has worked with private and public sector companies throughout North America and Europe.

Lesley-Ann Marriott, CEC, PCC is a Certified Executive Coach who holds the advanced credential of Professional Certified Coach. Lesley-Ann has over 25 years of leadership and management experience.

The Program

This is an in-residence program, and unless the program is held in Vancouver, participants are encouraged to stay on-site. The program cost includes course materials and some meals. Accommodation is extra – please contact us for more information. The regular program fee is $3,250, but register at least two months prior to the offering date for an early bird discount of $300. ***Note: Executive Programs are PD Passport Invalid.***

Upcoming Dates

April 20-22, 2020	Sutton Place Hotel, Vancouver
June 24-27, 2020	Westin Whistler Resort, Whistler
October 21-24, 2020	Westin Whistler Resort, Whistler

The CFO's Operational Skills Program

As senior advisor to the CEO and the Board – the CFO has five distinct 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. This program delivers the core CFO competencies that organizations expect and demand. Get up to speed on corporate governance and risk management and the latest tools and application. Examine the relationship of strategy and risk-taking and help drive your organization's mission and success.

Nail down the planning, budgeting and internal control competencies that facilitate efficient and effective operations. Explore the value-added CFO competencies in business valuation, business intelligence, M&A and intellectual property. Learn how to effectively communicate the core finance and operating results for internal and external stakeholders.

Who Should Attend

Do the CEO and the Board look to you for counsel and guidance? Do you currently direct, or wish to direct the finance and administration areas of your organization? Are you trying to improve governance, accountability and the control environment? Would you like to examine the state-of-the-art developments in strategy, risk management and financial reporting? If so, then this program was created with you in mind.

Faculty

Jeffrey Sherman, MBA, CIM, FCPA, FCA, has over 20 years experience as a Chief Financial Officer, primarily in the high tech, biotech and mineral exploration areas, with a large chartered bank in various senior capacities, and as a consultant in corporate finance. His areas of expertise include corporate governance, risk management, corporate finance, restructuring and start-up enterprises.

The Program

This is an in-residence program, and participants are encouraged to stay on-site. The program cost includes course materials and some meals. Accommodation is extra – please contact us for more information. The regular program fee is $3,250, but register at least two months prior to the offering date for an early bird discount of $300. ***Note: Executive Programs are PD Passport Invalid.***

Ethics Content

This seminar contains 4 hours of ethics content.

Upcoming Dates

June 14-17, 2020	Westin Whistler Resort, Whistler
October 18-21, 2020	Westin Whistler Resort, Whistler

The CFO as Navigator Program

Steering the Enterprise towards Value Creating Growth

The 21st century CFO is hearing the new calling from the corporate boardroom - "Step out and go beyond the box". The CFO as Navigator program is designed to provide you with a highly applied and interactive experience and will cover areas such as value creating growth, value metrics, best in class management reporting platform, enterprise dashboards, performance metrics and strategy maps, information management and business intelligence, corporate planning platform design and creation, talent management and incentive design. This program is designed to make you a complete CFO.

Who Should Attend

Do you feel that a broader knowledge base may augment your considerable finance/accounting knowledge? Are you interested in learning about new tools and methods to add value to your enterprise? Do you want to go beyond the stovepipe finance function? Do you have a desire to do more and be a complete CFO and lead a best in class finance function? If so, then this program is for you. This program is geared particularly towards those CFOs/Controllers in mid-market companies who are at the zenith of their career and are ready for the next challenge in their career.

Faculty

Dr. Vijay Jog is the Founder-President of Corporate Renaissance Group, a firm dedicated to driving better business management and performance. He has led CRG's growth in areas of corporate dashboards, business intelligence, bridging 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. He is also the Chancellor Professor of Finance at the Sprott School of Business, Carleton University.

The Program

This is an in-residence program, and participants are encouraged to stay on-site. The program cost includes course materials and some meals. Accommodation is extra – please contact us for more information. The regular program fee is $3,250, but register at least two months prior to the offering date for an early bird discount of $300. ***Note: Executive Programs are PD Passport Invalid.***

Upcoming Dates

September 23-26, 2020 | Westin Whistler Resort, Whistler

Enterprise Risk Management Fundamentals Program

In our increasingly complex environment, it is critical that Finance professionals understand and embrace Risk Management as a key discipline. This three-day, seven 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.

Learning outcomes

- understand how enterprise risk management enhances corporate governance and aligns with strategy and culture
- identify and assess various risks that may have critical impact on business, and choose the optimal risk mitigation strategies
- develop successful strategies for reporting on risk for Senior Management and Boards
- learn and properly apply key risk management tools

Who Should Attend

The program will be of great benefit to financial professionals with a few years of experience, who want to learn the fundamentals and best practices of risk management in order to either further their career, or add value to their organization. It is especially valuable for those financial professionals in organizations and industries where Risk Management is gaining critical importance.

Faculty

William (Bill) Wesioly, CPA, CMA is an independent Risk Management consultant and professional Leadership coach. He is an enthusiastic and accomplished leader whose goal is to enrich the effectiveness of people and organizations, with both skill and heart. Prior to becoming an independent consultant, he worked in the financial services industry holding leadership roles of increasing responsibility, first with BMO and then with RBC. His main area of focus was in the field of Risk Management where he successfully built and led risk management programs such as Risk and Control Assessments and Operational Risk Scenarios.

The Program

The program cost includes course materials and some meals. Accommodation is extra – please contact us for more information. The regular program fee is $3,150, but register at least two months prior to the offering date for an early bird discount of $300. ***Note: Executive Programs are PD Passport Invalid.***

Ethics Content

This seminar contains 0.5 hours of ethics content.

Upcoming Dates

May 11-13, 2020 | Location TBA, Vancouver

Governing with Intention™

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. This 3-day workshop combines WATSON's flagship Governing with Intention™ course and key components of Chair with Intention™ course to equip current and future directors with the skills to navigate the modern boardroom.

Balancing practical tips with leading governance practices, participants learn how to shift the dialogue to the issues that matter, navigate the line between governance and management, elevate their personal contribution at the board table, and design a positive board culture. Participants also explore the critical role of the board chair, with practical advice on how to tackle key issues in and between meetings. Participants will walk away with a customized action plan to elevate their board's contribution and help their organization perform better.

Who Should Attend

- Current, new, or incoming directors and board chairs
- CEOs looking to better understand how to partner with the board
- Members of management who plays a role in their organization's governance
- Professionals who work with boards

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.

The Program

The program cost includes course materials and some meals. Accommodation is extra – please contact us for more information. The regular program fee is $3,150, but register at least two months prior to the offering date for an early bird discount of $300. ***Note: Executive Programs are PD Passport Invalid.***

Upcoming Dates

October 26-28, 2020 | Location TBA, Vancouver

The CEO Program

Acquiring the Edge and Leading with Purpose

The title CEO is a misnomer. Leaders no longer execute, they decide … then motivate others to execute. They confront and unlock the immense, unforeseen opportunities that arise from turbulent, often unexplainable forces impacting their marketplace. They realize yesterday's solutions aren't just insufficient, they're counter-productive. So they "go back to school" to acquire the skills, insights and confidence to seize the white spaces of growth. They are in demand and they know it. Leading with purpose requires the ability to build and apply one's strategic intelligence, prick the bubble of ignorance and anticipate career derailers, select talent and develop a cohesive executive team, respond courageously to unexpected high-impact surprises, devise workable strategies that inform and inspire, and foster a culture of resilience that competes for the future.

This practical, provocative, one-of-a-kind program is the creation of Dr. Jim Murray, who has successfully led large and small organizations in the public and private sectors over the course of five decades. He counsels executives on how to handle complexity, uncertainty and the transformative volatility that impact their enterprise.

Who Should Attend

This advanced program is designed for current and aspiring leaders who seek to excel with confidence and conviction in the upper echelons of executive responsibility. Do you possess the emotional and mental qualities, interpersonal skills, street-smart insights, decision-making competencies and executive presence to lead? Beyond requisite skills, leadership means avoiding the allure of the slippery slope, knowing how to lead people who are brighter than you, designing a smart and a healthy organization, and deciding when "the game" must be retooled. Smart leaders have also resolved the life-altering questions that can determine one's identity and thus one's destiny.

Faculty

Dr. Jim Murray is CEO of optimal solutions international, a firm dedicated to helping people and organizations achieve their full potential. Jim has created and taught courses for CPABC since 1982. He holds four degrees, is the architect of several advanced executive development programs for four provincial CPA bodies, has published three best-selling books and provided strategic counsel to over 600 organizations. He has been nationally honoured by the university community and his courses formally recognized for "excellence in innovation and design".

The Program

The program cost includes course materials and some meals. Accommodation is extra – please contact us for more information. The regular program fee is $3,150, but register at least two months prior to the offering date for an early bird discount of $300. ***Note: Executive Programs are PD Passport Invalid.***

Upcoming Dates

July 13-16, 2020 | Location TBA, Vancouver

The Optimal Negotiator

The Definitive Program for Serious Deal Makers

Arguably, the one skill leaders must possess is the ability to get others to agree with them. In any undertaking of significance, whether personal or business, knowing how to get people to accept your point of view, while seeing themselves as winners, is crucial to your success and the prosperity of your organization. Indeed, you can't ever expect to ascend the corporate ladder without a sound grasp of fundamental negotiating principles, their subtle nuances and the skills to match those who do it well.

This advanced, comprehensive program is the creation of Dr. Jim Murray who has been practising this time-honoured craft over the course of five decades. Tens of thousands of people from all walks of life and professional callings have benefited from his unique, street-savvy insights, acclaimed expertise and direct, hands-on experiences in virtually every conceivable negotiating arena. This practical, highly interactive learning experience was designed specifically for those who are dead serious about wanting to rise above mere competence. You will confront questions about negotiating you've never thought about before. Although many understand the process intellectually, precious few are entirely comfortable in their ability to "optimize" deals. If you can't answer Jim's uncanny questions, you will lose more often than you win.

Who Should Attend

Negotiating is a delicate mix of art and science, style and substance. It prizes intuition as highly as intellect, common sense as much as hard numbers. It requires emotional detachment, an understanding of the critical process elements and a high aspiration level. It is a game of power, real as well as imagined. While some play the game masterfully, others only dimly understand it. How do you (honestly) assess your capabilities? If you seek greater comfort and confidence in your resolve to get others to agree with you, or aspire to mastery, then this program was designed with YOU in mind.

Faculty

Dr. Jim Murray is CEO of optimal solutions international, a firm dedicated to helping people and organizations achieve their full potential. Jim has created and taught courses for CPABC since 1982. He holds four degrees, is the architect of several advanced executive development programs for four provincial CPA bodies, has published three best-selling books and provided strategic counsel to over 600 organizations. He has been nationally honoured by the university community and his courses formally recognized for "excellence in innovation and design".

The Program

The program cost includes course materials and some meals. Accommodation is extra – please contact us for more information. The regular program fee is $3,150, but register at least two months prior to the offering date for an early bird discount of $300. *Note: Executive Programs are PD Passport Invalid.*

Upcoming Dates

November 17-19, 2020 | Location TBA, Vancouver

Testimonials

Enterprise Risk Management Fundamentals

"By far the best program I have attended. Have acquired relevant tools to take back and implement with the management team."

The Controller's Operational Skills Program

"The program enhanced my knowledge on my role as a controller and filled gaps. It was an excellent learning experience to reflect at discussions with other controllers."

The Controller's Management Program

"I feel rejuvenated, empowered and love that I will be able to pass along my takeaways to others in my organization - up, down, and across the line."

The CFO's Operational Skills Program

"This program was very comprehensive, adding new perspective plus amending known requirements of my role. It will add value to what I bring to the table within my organization."

The CFO's Leadership Program

"Turned the sceptical 'been there, done that' attitude into 'wow, would love to do more'..."

The CFO as Navigator Program

"This course is such a wealth of knowledge. Illustrates just how much information is out there. Guides you to a point where you can dive in and get immersed."

The Optimal Negotiator

"The program is highly interactive and life changing."

The CEO Program

"So many takeaways, there are many things that I can implement right away. Good course, really glad I took it."

PD Video On-Demand

The following seminars have been video recorded from live, in-person offerings, and are 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. The dates indicated below the titles reflect when the videos were recorded – information presented was up-do-date at the time of recording. Each title qualifies for verifiable CPD hours upon successful completion of a quiz at the end of the seminar.

Audit & Assurance

Assurance - Compliance with Agreements, Statutes and Regulations
Recorded: Dec 2019
Fee $225 PD Passport Valid – 1/2 Day 3.5 Eligible CPD Hours

Assurance - Update 2019
Recorded: Nov 2019
Fee $225 PD Passport Valid – 1/2 Day 3.5 Eligible CPD Hours

Audit Engagements - Review of the Standards
Recorded: Nov 2019
Fee $785 PD Passport Valid – 2 Days 14 Eligible CPD Hours

Compilation Engagements – Review of Section 9200
Recorded: Jan 2020
Fee $225 PD Passport Valid – 1/2 Day 3.5 Eligible CPD Hours

Quality Control – Review of CSQC1
Recorded: Nov 2019
Fee $225 PD Passport Valid – 1/2 Day 3.5 Eligible CPD Hours

Review Engagements - Application of the Standard
Recorded: Jan 2020
Fee $450 PD Passport Valid – 1 Day 7 Eligible CPD Hours

Financial Reporting

ASPE - Review of the Standards
Recorded: Dec 2019
Fee $785 PD Passport Valid – 2 Days 14 Eligible CPD Hours

ASPE - Strategic Investments
Recorded: Dec 2019
Fee $450 PD Passport Valid – 1 Day 7 Eligible CPD Hours

ASPE - Update 2019
Recorded: Nov 2019
Fee $225 PD Passport Valid – 1/2 Day 3.5 Eligible CPD Hours

IFRS - Review of the Standards
Recorded: Dec 2019
Fee $785 PD Passport Valid – 2 Days 14 Eligible CPD Hours

IFRS - Update 2019
Recorded: Dec 2019
Fee $225 PD Passport Valid – 1/2 Day 3.5 Eligible CPD Hours

IFRS 9 - Financial Instruments
Recorded: Dec 2019
Fee $450 PD Passport Valid – 1 Day 7 Eligible CPD Hours

IFRS 15 – Revenue Recognition
Recorded: Nov 2019
Fee $450 PD Passport Valid – 1 Day 7 Eligible CPD Hours

IFRS 16 - Leases
Recorded: Dec 2019
Fee $450 PD Passport Valid – 1 Day 7 Eligible CPD Hours

NFPO - Review of the Standards
Recorded: Dec 2019
Fee $450 PD Passport Valid – 1 Day 7 Eligible CPD Hours

Taxation

Corporate Tax - Review of Tax Planning
Recorded: Nov 2019
Fee $785 PD Passport Valid – 2 Days 14 Eligible CPD Hours

Corporate Tax - Scientific Research & Experimental Development (SR&ED): Fundamentals
Recorded: Nov 2019
Fee $225 PD Passport Valid – 1/2 Day 3.5 Eligible CPD Hours

GST/HST – CRA Audit
Recorded: Nov 2019
Fee $450 PD Passport Valid – 1 Day 7 Eligible CPD Hours

Personal Tax - Review of Tax Planning
Recorded: Nov 2019
Fee $785 PD Passport Valid – 2 Days 14 Eligible CPD Hours

PD AudioWeb On-Demand

PD AudioWeb are direct audio recordings from live PD seminars.

The audio recordings and corresponding PowerPoint visuals are available as MP4 files, along with any available handout materials in PDF files. These titles 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.

How to get started

After you purchase your AudioWeb title(s), you can log into CPABC Online Services and go to your Professional Development History tab. The MP4 file, along with any available PDF handouts, will be downloadable in a zipped folder, and will be accessible right away if the AudioWeb title is already available. If the audio title is not yet available, you will receive a notification when it has been uploaded.

After you have finished listening to the audio file, you can return to the same online services tab and complete the quiz.

Special Note

- all new and updated AudioWeb titles will be available two weeks after the classroom seminar date – please take this into consideration before placing your order.
- most titles are recorded from Executive Brief and Nexus Day sessions, and are eligible from 1 to 2 Verifiable CPD hours each – half-day sessions are eligible for 3.5 Verifiable CPD hours each – these hours are noted in brackets next to each title.
- PD AudioWebs are eligible under the Personal and Flexi PD Passport programs.

Because these audio recordings are made from live seminars, the information presented is up-to-date at the time of recording. While we make an effort to keep the our inventory updated and seasonally remove outdated titles, changes in accounting, tax and other acts and legislations can happen at any time.

It is up to the purchaser to take note of the recording date, and to determine for themselves whether the recorded audio is still relevant to their needs.

PD AudioWeb Titles Available

Eligible CPD hours are indicated in brackets next to each title.

Accounting, Assurance, Financial Reporting & Management Accounting Titles

Lenders, Banking, and Your Client Jun 2019 (3.5)

Presenter: Kristi Miller

This session will help you better understand what your lender wants, and in turn, how you can help your client or company better negotiate its borrowing facilities.

1/3 Passport Day **$110**

Review Engagements: Overview of CSRE 2400 Sep 2018 (1.5)

Presenter: Bridget Noonan

This session is designed to provide an in-depth review of the application of the new Canadian Standard on Review Engagements (CSRE) 2400, Engagements to Review Historical Financial Statements, which is effective for periods ending on or after December 14, 2017. Each stage of the review engagement will be considered, from planning to issuance of the practitioner's report, including a detailed examination of changes relative to the former standards.

1/3 Passport Day **$75**

Rising Expectations of Corporate Reporting: The Landscape of Non-Financial Disclosure Dec 2017 (1.5)

Presenter: Christie Stephenson

This session will introduce you to ESG frameworks and standards, to enable you to better understand the information reported by organizations and how to use that information in making informed decisions.

1/3 Passport Day **$75**

Public Practice Titles

Considering Starting a CPA Practice Oct 2016 (2)

Presenter: Bridget Noonan

The purpose of this webinar is to provide general information at the contemplation stage of starting a public practice. Prior to undertaking this rewarding, yet demanding career and initiating the registration and/or licensing process, it is important to understand the general time and cost commitments. This webinar will address a number of pre-registration considerations with a focus on the high-level business, professional and regulatory requirements of running a public practice.

Free

More than Bean Counters – Branding and Marketing Your CPA Firm Oct 2017 (1.25)

Presenters: Grant Smith, Corinne Impey

This session, co-presented by a communications specialist and a public practitioner, will explore branding considerations for small firms, as well as online marketing strategies including website design, email marketing and the use of social media to reach and engage both prospective and current clients.

1/3 Passport Day **$75**

General Management Titles

7 Vital Strategies to Optimize Personal Productivity — Oct 2019 (1)

Presenter: Greg Campeau

Feeling caught between a clock and a hard place? The 21st Century workplace "Time Management" presents new challenges and old solutions that don't work anymore! In this leading-edge presentation, participants will learn practical strategies that will help them produce greater results in less time. Participants learn how to gain and keep control of competing priorities resulting in greater peace of mind Anyone who thinks they don't have enough time to attend this workshop should sign up immediately!

Code: U0546MA_OD 1/4 Passport Day $45

A Practical Tool to Help You Deliver Polished Presentations — Dec 2018 (1)

Presenter: Daphne Grey-Grant

Do you become anxious every time you are faced with making a presentation to your executive group, or, worse to a big crowd? Calm your nerves with an easy-to-use 7-step process that will make presentations a breeze. Even better, learn the skill of Mind Mapping to help generate new ideas and inspire you to prepare your presentation in record time.

1/4 Passport Day $45

Accommodating Disability in the Workplace — Jul 2018 (1.5)

Presenter: Geoffrey Howard

This session will help participants understand employer obligations and rights when managing disabled employees in the workforce.

1/4 Passport Day $45

Anti-Money Laundering : An Interactive Overview — Dec 2019 (1)

Presenter: Daniel Speirs

This title was recorded from a session at the PD Nexus: Business & Innovation Insights. This session will provide an interactive overview of money laundering and appropriate responses, including the importance of anti-money laundering (AML) in modern society, stages and common indicators of money laundering, minimum elements of an AML compliance program and penalties for non-compliance.

1/4 Passport Day $45

PD Nexus: Beyond Financial Reporting — Oct 2019 (6)

Presenters: David Dunne, Christian Codrington, Carson McKee, Corinne Impey, Greg Campeau, Ken Puls

Designed to enhance your skills beyond the traditional accounting role, this series will include the best of the best in HR practices, Excel updates, new skills in communication and presentation, personal productivity, and problem solving. It includes the following sessions:

- Icebergs, Waterfalls and Wicked Problems: The Promise of Design Thinking (1 hour)
- Essential HR Processes and Systems (1 hour)
- Presentation Skills for Introvert Accountants (1 hour)
- Clear, Concise, Consistent - The Three C's of Effective Communication (1 hour)
- 7 Vital Strategies to Optimize Personal Productivity (1 hour)
- What's New in Excel (1 hour)

These sessions are also available for purchase separately

1 Passport Day $220

Bring Innovation to Life in Your Business — Dec 2019 (1)

Presenter: Jeffrey Kearney

This title was recorded from a session at the PD Nexus: Business & Innovation Insights.

Every organization needs to be on its toes, innovating to deliver value right now while simultaneously designing and creating for a profitable future. In this session, we will reach a shared understanding of what it means to be innovative, consider how to create a sustainable innovation culture and look at several tools and processes for assessing and acting on innovation in your teams and organization.

1/4 Passport Day $45

Clear, Concise, Consistent - The Three C's of Effective Communication — Oct 2019 (1)

Presenter: Corinne Impey

Learn how to clearly convey your ideas, connect with your audience and communicate with confidence. Explore strategies for becoming a more effective, influential communicator both internally and externally in the workplace.

1/4 Passport Day $45

Cloud Computing — Dec 2016 (1.5)

Presenter: Regan McGrath

The session will discuss essentials of cloud-based computing for accounting in industry: when to move your organization to the cloud; responsible transition from a paper-based to a cloud-based platform; security in the digital environment; best practices in digital file management; and cloud-based financial technology and integrations on the market.

1/3 Passport Day $75

Dispelling the Myth of "Effective Meetings" — Jul 2018 (1)

Presenter: Tammy Towill

Assist your team in building meetings that are relevant, productive, engaging and yes, even welcomed by others in your organization. The session will explore the value and benefit of meetings, while challenging the structure of how these meetings are undertaken. You will better understand the impacts of individual communication styles and organizational culture on meetings.

1/4 Passport Day $45

Employment Standards Overview — Jul 2020 (3.5)

Presenter: Geoffrey Howard

The purpose of this seminar is to review compliance with key provisions of the Employment Standards Act, including any recent updates, as well as commonly misunderstood and overlooked employment standards rules.

1/3 Passport Day $110

Essential HR Processes and Systems — Oct 2019 (1)

Presenter: Christian Codrington

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

1/4 Passport Day $45

Fostering Innovation & Entrepreneurial Thinking — Dec 2017 (1.5)

Presenter: Sarah Morton

This session will focus on how to foster that culture, while leveraging data and information to create a modern and adaptive business environment that leads to organizational success.

1/3 Passport Day **$75**

Handling Termination of Employment — Dec 2019 (2)

Presenter: Geoffrey Howard

This session provides an overview of issues surrounding the termination of employment, and includes recent updates in the area.

1/3 Passport Day **$75**

How to Tackle the Difficult Conversation — Nov 2018 (1.5)

Presenter: Lesley-Ann Marriott

Difficult conversations are an art and it is possible to embrace the challenge and overcome the anxiety a difficult conversation presents. This session will outline the simple process to prepare and approach all challenging conversations and provide brain science tips for creating positive interactions that transform even the most difficult conversations into stronger relationships.

1/4 Passport Day **$45**

Icebergs, Waterfalls and Wicked Problems: The Promise of Design Thinking — Oct 2019 (1)

Presenter: David Dunne

"Wicked problems" in society and business are critical and notoriously difficult to define; traditional, linear problem-solving methods are inadequate for such problems. Design thinking is an iterative cycle of action and reflection, in which design thinkers understand users, frame and reframe problems, and prototype solutions. Participants will learn the process and mindset of design thinking and practice specific methods.

1/4 Passport Day **$45**

Influencing Without Authority — Jul 2018 (1)

Presenter: Rob Gilfoyle

Leaders are recognizing that if they want to achieve results in this environment, they must be good at influencing others. This session will provide you with valuable influencing tools and techniques. Learn why being able to influence has become one of the most important leadership skills in the modern workplace, and how to influence in a professional and effective way.

1/4 Passport Day **$45**

Leadership in an Environment of Rapid Technology Change — Jul 2018 (1)

Presenter: Carson McKee

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

1/4 Passport Day **$45**

Leading Unique Individuals — Jul 2018 (1.5)

Presenter: Barry Christiansen

Does your leadership style recognize and encourage diversity of thinking and approach from your team? Are you maximizing the benefits of a diverse team to deal with complex issues and create value-added solutions? How can you inspire innovation and spark creativity in teams? Experience a fun yet relevant session as you learn about the Insights Discovery framework and how your psychological preferences contribute to leadership and diversity in unique ways.

1/3 Passport Day **$75**

Mastering Leadership: What Type of Leadership is Needed to Drive Business Performance Today? — Dec 2018 (1.25)

Presenter: Alex Wray

In an age of unprecedented change, leadership matters more than ever; but what does it actually look like? What rules still apply? This presentation offers a fresh lens through which to view leadership, based on compelling and conclusive research. Learn how to apply a more agile mindset when leading, 5 leadership competencies proven to be the greatest drivers of business performance and 3 behavioral patterns to avoid that most frequently erode a leader's impact.

1/3 Passport Day **$75**

Maximize Your Workforce: Bridging the Generational Divide — Dec 2016 (1.5)

Presenter: Robert Murray

This session dives into what you need to know to best enable today's workforce: understand the drivers for different generations interacting in today's workforce; build a culture that can accommodate each demographic group; and harness the strengths of each group to benefit the business, employees and customers.

1/3 Passport Day **$75**

Negotiating: Challenges & Pitfalls — Mar 2003 (2)

Presenter: Tom Knight

This session will look at some of the sharpest challenges faced by negotiators and mistakes we commonly make in response to them. It will provide some key learnings from negotiations research and experience to help you conduct more effective negotiations in challenging circumstances.

1/3 Passport Day **$75**

Own Your Own Projects: Task Management for Powerful Results — Jul 2018 (1)

Presenter: Scott Friesen

Do you have too much on your plate right now? Learn efficient ways to manage all of your commitments and work at your productive best. You'll learn how to break down overwhelming projects into manageable tasks and why prioritizing your work actually hurts productivity. Find out how to develop a daily routine to focus on your most important tasks and how to prevent procrastinations and achieve greater focus.

1/4 Passport Day **$45**

Planning for a Business — Nov 2016 (2)

Presenter: Rieghardt van Enter

Learn how to consider and challenge the drivers behind financial forecasts, explore how to quantify the non-financial aspects of the business; breakdown the linkages between strategy, mission and vision; and enhance your knowledge and skills in both developing and formatting powerful business plans.

1/3 Passport Day **$75**

Presentation Skills for Introvert Accountants Oct 2019 (1)

Presenter: Carson McKee

Public speaking is often rated as peoples' #1 fear but it doesn't have to be this way. Have you ever wanted to be more confident in giving presentations? This session will help build confidence in delivering effective and engaging presentations. Learn how to structure a presentation for maximum effect, methods for building effective presentations, how to build confidence in public speaking.

1/4 Passport Day **$45**

Reframing Gender Equality Jul 2018 (1)

Presenter: Monica Murray

Gender equality, equal pay for equal work, and the Time's Up movement have been in the spotlight. This session is for everyone who is interested in the future of work and will explore why gender equality is good for business and how to improve it. You'll also learn the latest Canadian data on gender equality and pay equity.

1/4 Passport Day **$45**

Securing Your Organization's Future: Managing the Revolving Door of Succession Planning and Employee Retention Dec 2018 (1.25)

Presenter: Tammy Towill

This session will examine succession planning at every level, not just at retirement, and how to attract and retain employees, especially the millennial generation. We will explore tools and strategies for how best to mitigate these risks to ensure your organization's future stability and success.

1/3 Passport Day **$75**

Strategies for Leading in a VUCA World Dec 2019 (1)

Presenter: Tammy Dewar

This title was recorded from a session at the PD Nexus: Business & Innovation Insights. Gain insights into how you can manage our increasingly VUCA world (Volatile, Uncertain, Complex, and Ambiguous). Learn strategies that will help you improve your vision, courage, and character and enable you to make the leadership impact you want.

Code: U0550MA_OD **1/4 Passport Day** **$45**

Supercharge Your Business with IT Jun 2017 (1.5)

Presenter: Mike Knapp

This session will lead you through the process of transforming IT from disruptor to value creator. We will review some of the top applications and tools in areas such as communications and collaboration, task management, and personal productivity.

1/3 Passport Day **$75**

The Robots are Here: How Automation is Demanding that Soft Skills be our Competitive Advantage Dec 2018 (1)

Presenter: Casey Miller

AI, machine-learning, and robotics are automating everything from manufacturing to biotechnology. Accounting is not immune. With disruption impacting the future of work, what skills will be key to keeping our profession relevant? This session will highlight changes expected for our industry, and give insights into the human skills that will be most imperative now that the robots are here.

1/4 Passport Day **$45**

Thinking for a Change - Preparing Your Mind and Brain for Disruption Dec 2019 (1)

Presenter: Terry Small

This title was recorded from a session at the PD Nexus: Business & Innovation Insights. If there is one certainty in business today, it's this: change is coming your way. With vast amounts of information pouring in from hundreds of sources, thinking clearly and acquiring knowledge has become a major challenge. This session will give you clear and practical ideas to help you think flexibly, and learn anything better, easier, and faster.

1/3 Passport Day **$75**

Top Employment Issues Affecting Your Bottom Line Dec 2019 (3.5)

Presenter: Geoffrey Howard

This session will provide an overview of the top employment issues including recent developments in workplace law, focusing on those issues that materially impact the bottom line.

1/3 Passport Day **$110**

What is Your Happiness Practice Jul 2015 (2)

Presenter: Tammy Robertson

Is it possible to develop strategies that help you sustain positive energy, deep engagement, and a sense of humour and lightness? If you have been on achievement autopilot driven by goals that keep you pressing forward, but not feeling excited and alive, this session will show you how to get more of the satisfaction you are craving.

1/3 Passport Day **$75**

What Leaders Know About Communication Nov 2014 (2)

Presenter: Sharon Edwards

Leaders know that without effective communication skills, it is impossible to share a vision that will create a strategy that can support a team to a successful outcome. Learn more about improving your skill set as a master communicator. Stop wasting time and energy talking in circles – communicate like a leader instead.

1/3 Passport Day **$75**

What's New in Excel Oct 2019 (1)

Presenter: Ken Puls

How familiar are you with what's changed in Excel in the last few versions? Do you know about Power Query and Power Pivot, and how they've eliminated data processing during the process of reporting your KPI's? How about spreadsheet Co-Authoring, Rich Data Types, Insights, Map Charts, and Dynamic Arrays? Learn about the amazing features that may already be living on your desktop!

1/4 Passport Day **$45**

Your People Strategy–Time for a Tune Up? Oct 2016 (1.5)

Presenter: Marlene Delanghe

Learn the latest strategies and tips for how to attract, hire, engage and retain the most critical resource, your people. Gain tips for assessing and planning for people resources; strategies for recruiting in a social and modern world; orienting your new staff to increase engagement at the outset; growing and developing your staff in alignment with business needs; and more.

1/3 Passport Day **$75**

Taxation & Wealth Management Titles

An Introduction to FAPI **Nov 2019 (2)**

Presenters: Paul Dhesi, Kevin Too

The FAPI rules introduce a number of tax risks and reporting obligations. This seminar will help practitioners identify FAPI risks and learn ways to mitigate such risks. The session will use extensive examples to illustrate the concepts and tips and traps to be aware of in structuring foreign operations.

1/3 Passport Day **$75**

Basic Tax Compliance in Self-Employment and Home-Based Business **Feb 2018 (2)**

Presenter: Mark Ostry

You're your own boss, but you're stuck with all the paperwork too. What do you need to know to make sure you're compliant with your tax obligations? This session will cover the fundamental tax compliance issues of setting up and running a self-employed small home business.

1/3 Passport Day **$75**

BC PST Refresher & Comparison with GST/HST **Mar 2019 (2)**

Presenter: Zaheer Jamal

This session is designed to provide a high level overview of basic BC PST rules and to address differences between BC PST and GST/HST. It will help you recognize your (or your clients') PST responsibilities and entitlements. It is designed to be broad in scope and will not focus on any particular industry.

1/3 Passport Day **$75**

BC Speculation and Vacancy Tax **Mar 2019 (2)**

Presenter: Zheting Su

This session will cover the general structure, scheme, and application of BC's new Speculation and Vacancy Tax. The seminar leader will discuss major segments of the legislation, including the imposition of tax, various exemptions, key interpretive rules, and administration and enforcement. In addition, the seminar will provide guidance on how to navigate through the complex web of rules in the legislation.

1/3 Passport Day **$75**

Breaking Up is Hard to Do **May 2018 (3.5)**

Presenters: Shane Onufrechuk, Lisa Slater

When a marriage or common-law relationship ends, dividing the family assets can be stressful and complicated. Learn how business and family assets are classified in family law and the role you can play in effectively advising both lawyers and clients.

1/3 Passport Day **$110**

Canadian Capital Additions and the CCA: The Latest Rules **Dec 2019 (1)**

Presenter: Mark Ostry

This title was recorded from a session at the PD Nexus: Business & Innovation Insights. This session will include a review of current and relevant developments in the area of Capital Cost Allowance (CCA) rules, rates and classes. It will discuss accelerated/enhanced CCA on capital additions, general capital cost allowance classes, including the distinction between class 10 and 10.1 re: automobiles and passenger vehicles and the importance thereof, and the relatively new Class 14.1 – Eligible Capital Expenditure.

1/4 Passport Day **$45**

Cash Savings Opportunities in a Fast-Paced World **Oct 2018 (2)**

Presenters: Kevin Eck, Rod Hynes

This session will review incentives and tax credits that are available, some of which you may have heard of and a few you may not have. Knowledge of what incentives/credits are out there is important and timing is key.

1/3 Passport Day **$75**

Corporate Tax – Shutting Down the Corporation **Nov 2019 (3.5)**

Presenter: Mike Stubbing

This session will focus on the many tax issues that arise – both compliance and planning related – when shutting down a corporation, and will primarily focus on private companies. It will deal with taxable and non-taxable amalgamations and windups, as well as corporate dissolutions. Common traps and planning opportunities will be discussed.

1/3 Passport Day **$110**

Creative Use of Partnerships in Tax Planning **Jun 2020 (3.5)**

Presenter: John Gregory

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

1/3 Passport Day **$110**

Employing Contractors and Contracting Employees: Sorting Out Tax and Legal Issues **Jun 2020 (2)**

Presenters: Shane Onufrechuk, Richard Press

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

1/3 Passport Day **$75**

Essential Documents of any Successful Estate Plan **Feb 2019 (2)**

Presenters: Andrea Frisby, Christine Muckle

Learn the "building block" legal documents that are crucial for every estate plan. While many understand a Will is needed, a well-thought-out and comprehensive estate plan may also consider trusts, marriage/cohabitation agreements, co-ownership agreements, shareholder agreements, and beneficiary designations, to name a few. We will explore these documents (and more), and just how they can be used to create a successful estate plan.

1/3 Passport Day **$75**

Ethical Tax **Oct 2016 (1.5)**

Presenter: Mike Coburn

Tax is seldom black or white. In this session, case studies will be used to provoke discussion on ethical dilemmas confronting accountants related to tax matters. You will be challenged to consider how you would handle a variety of ethical tax scenarios and will develop your ability to recognize ethical tax issues as well as your confidence in handling ethical tax dilemmas. This session contains 1.5 hours of ethics content.

1/3 Passport Day **$75**

Executive Compensation Jul 2018 (2)

Presenter: Ian Gamble

This session will discuss the design and taxation of deferred executive compensation plans that avoid the salary deferral arrangement rules. The plans canvassed will include stock option plans, share purchase plans, deferred bonus plans, deferred share unit plans, share appreciation right plans, and supplemental executive retirement plans. Several tax issues for each of these will be canvassed.

1/3 Passport Day $75

GST/HST: Tips and Traps Nov 2018 (2)

Presenter: Ken Ghag

This session will discuss the design and taxation of deferred executive compensation plans that avoid the salary deferral arrangement rules. The plans canvassed will include stock option plans, share purchase plans, deferred bonus plans, deferred share unit plans, share appreciation right plans, and supplemental executive retirement plans. Several tax issues for each of these will be canvassed.

1/3 Passport Day $75

Income Tax: BC Real Estate Tax Jul 2019 (2)

Presenters: Roque Hsieh, Henry Liao

This seminar will provide update on various real estate related tax measures announced at the Federal (Federal Budget), Provincial (BC Budget), and Municipal levels (Vancouver – Empty Homes Tax).

1/3 Passport Day $75

Income Tax - Starting Up a Business Dec 2018 (3.5)

Presenter: Mike Stubbing

This session focuses on the many tax issues that arise – both compliance and planning related – when starting a business. The session is primarily focused on private companies. It does not touch on provincial-specific regulations or non-tax issues that are relevant to private companies. Common traps and planning opportunities will be discussed.

1/3 Passport Day $110

Introduction to Portfolio & Investment Management Techniques Dec 2015 (1.75)

Presenter: Tanner Philp

This session will provide an understanding of basic portfolio and investment management techniques. Learn the building blocks of portfolio and investment management used by professional advisors, and come away with a greater understanding of how to manage your own portfolio, and/or develop a better benchmark against which to gauge your personal financial advisor.

1/3 Passport Day $75

Legal Considerations for Death and Incapacity Feb 2018 (2)

Presenters: Christine Muckle, Genevieve Taylor

Learn what comprises a comprehensive plan for death and incapacity in the context of the Wills, Estates and Succession Act (WESA) and other recent legislative amendments. The Will is the foundation but other building blocks such as joint tenancy, beneficiary designation, and trusts can be used to achieve various goals. Incapacity planning is also a key element of any personal plan.

1/3 Passport Day $75

PD Nexus: Estate Planning Insights Oct 2018 (9.25)

Presenters: Stephanie Daniels, Sally Dennis, Kiu Ghanavizchian, Lisa Hamilton, Michelle Isaak, Kirsten Jenkins, Roger Lee, Sharon MacMillan, Florence Marino, Kate Marples, Sheryne Mecklai, Jason Moon, Cheyenne Reese, Richard Weiland, Janice Wells, Geoff White, Hugh Woolley

PD Nexus: Estate Planning Insights was a joint conference presented by CPABC and The Society of Trust and Estate Practitioners (STEP) Vancouver branch. It was designed for estate-planning practitioners. The series includes the following sessions

- The New Landscape: Recent Tax Changes Affecting Real Estate (1.5 hours)
- Tax and Accounting Implications of Probate Planning, Including Alter Ego and Joint Spousal Trusts (1 hour)
- U.S. Tax Cuts & Job Acts: The Impact on Estate Planning for Clients Who are U.S. Persons or Who Hold U.S.-Site Assets (1 hour)
- Estate Planning for First Nations Clients (1 hour)
- Life Insurance Update (1 hour)
- But What Does it All Mean? Practical Implications of the New Tax Rules (1.25 hours)
- How Vulnerable is the Discretionary Trust? (1.25 hours)
- The Shareholders' Agreement as a Tool to Facilitate Business Succession (1.25 hours

1 Passport Day $220

PD Nexus: Financial Planning Insights Dec 2017 (7.5)

Presenters: Jamie Bonham, Andrea Frisby, Christine Muckle, Trevor O'Reilly, Shane Onufrechuk, Dominique Ramirez, Ian Robertson, Tracy Theemes, Chadwick Walker

Designed for professional accountants and other financial professionals who want to obtain insights into the topic area of financial planning, the series includes the following sessions:

- The Psychology of Investing (1.5 hours)
- Corporate Tax Planning for Private Enterprises (1.5 hours)
- The Essential Legal Documents of any Successful Financial Plan (1.5 hours)
- Ethical Based Investing - Panel Discussion (1.5 hours; this session contains 1.5 hours of ethics content)
- Planning Priorities at Different Life Stages & Financial Analysis for Retirement Planning (1.5 hours)

1 Passport Day $220

Probate Fee Avoidance Planning Nov 2019 (2)

Presenter: Genevieve Taylor

The session will review the fundamentals of when and why probate is required and what property is subject to the process. It will also examine the various strategies that can be employed to avoid probate fees. Each probate fee avoidance strategy will be discussed in the context of achieving other common estate planning goals.

1/3 Passport Day $75

Retirement Planning for Financial ProfessionalsJul 2017 (1.5)

Presenter: Tracy Theemes

This session will discuss the changing conditions of older adulthood and new ways to approach financial planning. It will also address common mistakes in personal strategies and areas to be particularly mindful about.

1/3 Passport Day $75

Sleeper Tax Issues **Nov 2019 (1)**

Presenters: Richard Myers, Sheryne Mecklai

Tax rules are complex, and transactions that are look straight forward can have unintended consequences. This session outlines some common scenarios that can have hidden tax risks, and will provide advice on how to avoid the risks and when you should consult with a tax specialist. You owe it to yourself and your clients to make sure that you avoid these tax traps and pitfalls.

1/4 Passport Day **$45**

Specified Corporate Income: The Long Reach of the New Rules **Nov 2018 (1)**

Presenters: Hayley Brown, Shane Onufrechuk

The 2016 Federal Budget put in place complicated new rules to prevent the multiplication of the small business deduction by owners of a business. This session will provide a high level overview of the rules and unexpected traps to watch out for, including common structures that are impacted by these rules and potential restructuring opportunities. Note that this title has overlapping content with *SBD Multiplication – Closing the Loopholes & the Impact on CCPCs.*

1/4 Passport Day **$45**

The Return of Foreign Exchange Volatility and How to Mitigate the Risks to Your Business **Dec 2018 (1)**

Presenter: Yoel Tewelde

This session will cover certain key fundamental Canadian and US tax principles applicable to cross-border financing, the impact of US Tax Reform, and tips and traps of cross-border inbound and outbound financing arrangements to/from Canada and the US.

1/4 Passport Day **$45**

To Be or Not To Be: The Executor – Powers, Obligations & Liabilities **Nov 2019 (2)**

Presenters: Christine Muckle, Genevieve Taylor

Acting as an Executor can be financially rewarding for the member or the member's client who agrees to act. The goal of this session is to provide you with sufficient knowledge so that you can make an informed decision or assist your clients in making informed decisions as to whether you or your clients should take on the Executor's role. You will learn and examine the stages of estate administration from date of death through to distribution, final accounting and release.

1/3 Passport Day **$75**

U.S. Tax: Cross Border Financing and U.S. Tax Reform: Tips & Traps **Nov 2018 (2)**

Presenters: Jodi Moss, Wynn Vo

This session will cover certain key fundamental Canadian and US tax principles applicable to cross-border financing, the impact of US Tax Reform, and tips and traps of cross-border inbound and outbound financing arrangements to/from Canada and the US.

1/2 Passport Day **$75**

US Tax Reform – Implications for Canadian Businesses **Dec 2019 (2.5)**

Presenters: Jodi Moss, Wynn Vo

This session discusses the general impact of US tax reform on Canadian companies operating in the US, with a focus on practical examples for how to optimize cross-border structures in a post-tax reform world.

1/3 Passport Day **$75**

On-Demand Archived Broadcasts

The following titles are archived video recordings of a live streamed seminar. Each title qualifies for verifiable CPD hours upon successful completion of the quiz.

PD Nexus: Work Life Balance Insights **Jul 2019 (7)**

Presenters: Michelle Cederberg, Tammy Robertson, Paul Krismer

Learn how to develop personal strategies to increase productivity and achieve better life balance. The series includes the following sessions:

- Exposing the Myth of Life Balance (1.5 hours)
- The Time of Your Life – Lessons for Getting it Right (1.15 hours)
- Stress Defence: Combat Tips (1.15 hours)
- The Time is NOW – Make this Moment Matter (1.15 hours)
- The Serious Business of Positive Emotions (1.5 hours)

1 PD Passport Day **$475**

The Time of Your Life, Stress Defence, and The Time is NOW are also available for purchase individually – check our website for details.

PD Nexus: Public Practice Insights **Nov 2019 (5)**

Presenters: Dr. Albert Erisman, Shawna Hansen, Eric Byres, Kristin Hazzard

PD Nexus: Public Practice Insights focused on practice management and improving profitability. The day was designed to bring members inspiring sessions on ways to maximize often-missed practice opportunities, identify risk areas where a specialist's help is needed and how to build on the value your professional designation and underlying ethics bring to your clients. This package includes the following sessions:

- Ethics: Mission Control, Not Damage Control (1.25 hours, contains 1.25 hours of ethics)
- Strategies for Responding to Commodity Tax Issues (1.25 hours)
- Keeping You (and Your Clients) Safe from Cyber Crime (1.25 hours)
- Your Oxygen Mask First (1.25 hours)

1 Passport Day **$285**

"Ethics: Mission Control, Not Damage Control", "Strategies for Responding to Commodity Tax Issues", and "Keeping You (and Your Clients) Safe from Cyber Crime" are available for purchase separately.

K2E Canada Inc
Technology-Focused Webinars

CPABC in partnership with K2E Canada Inc are pleased to present the following technology-focused webinars to our members. Participants who take these webinars will have the opportunity to learn from an award-winning team of instructors.

How to Get Started

1. Upon registration and payment, the participant will receive an email from K2 confirming their registration along with instructions on how to join the session.
2. To connect to the online training session, simply click on the designated link in the email message.
3. Audio options – you can either listen in through your computer's audio system, or dial-in to the online training event using your phone. Please note these will not be toll-free calls.
4. Platform – K2 will use the GoToTraining solution from Citrix as the training platform. This solution works with virtually all computers.

Verifiable CPD Hours

Testing is required to complete a K2 online training course and earn CPD credits. However, at intervals during the presentation, you will need to respond to polling questions to confirm your attendance and active participation in the event. A minimum of four polling questions will be presented for each recommended CPD credit hour. You must answer at least 75% of these questions in order to receive full CPD credit for the program.

Registration Note

Please note that as login instructions and course reminders will be emailed to the registrant from K2E, it is necessary for CPABC to provide your name and email to K2E Canada Inc – these will be used solely for confirmations and reminders for the registration(s) only.

Upcoming Webinars

The following are a selection of titles offered. You will find course descriptions, dates, pricing, and the most updated list of available titles on our website, **pd.bccpa.ca**. These webinars are also PD Passport valid.

Advanced Topics in Power BI
Array Formulas - Exceptional Power at Your Finger Tips
Automating Client Accounting Services
Best Practices for Selecting and Implementing Business Management Software
Blockchain and Other Emerging Technologies
Create Stunning Dashboards with Power BI Desktop
Current Tech Crimes – Ripped from the Headlines
Custom Apps and Workflows
Data Consolidation and Combination in Excel
Data Governance and Data Privacy Regulation Basics
DAX – The Secret to Better Data Models
Detecting and Preventing Spreadsheet Errors
Do It Yourself Business Intelligence
Emerging Technologies
Excel 2013-2019 - Best New Features for Accountants
Excel Advanced Technologies
Excel Budgeting Techniques
Excel Guru - Tips to Make Your Head Spin
Excel PivotTables for Accountants - Part I
Excel PivotTables for Accountants - Part II
Excel Tables - Database Technology Comes to Spreadsheets
Excel Techniques for Detecting and Preventing Fraud
Implementing Security and Privacy Policies
Improving Collaboration with Microsoft Teams
Improving Productivity with Office 365
Integrating and Sharing Data
Integrating Excel with Word and PowerPoint
Introduction to Power Query
Introduction to the Excel Data Model
Mastering Advanced Excel Functions and Formulas
Mastering Excel Charts
Mastering PivotTable Calculations and Data Summaries
Mastering PowerPoint for Effective Presentations
Mastering the Excel Macro Recorder
Microsoft Outlook - Contacts, Calendars, and Meetings
Microsoft Outlook - Inbox Organization and Optimization
Microsoft Outlook - Tips, Tricks and Advanced Techniques
Next Generation Excel Reporting
Office 2019 or Office 365 - Make the Right Decision
Power Query Tips, Tricks, and Advanced Techniques
Powerful Data Analysis with PowerPivot
Powerful Features You May Have Missed in Excel
Powerful Reporting with Cube Formulas
Tech Update 2020
The How's and Why's of User-Defined Functions in Excel
The Perfect Storm - Data Governance
The Very Real Risk of Ransomware
Top Excel Tips and Tricks
Understanding Workflow and Automation Essentials
Windows 10 Productivity Tips and Tricks
Word Advanced Tips, Tricks and Techniques

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 & analysis (FP&A), corporate development, treasury, investor relations, and capital markets. The following archived webinars are available to CPABC members at a special price and are also PD Passport valid. Visit our website at pd.bccpa.ca for more details on the courses

Available Titles

Excel Modeling Fundamentals (previously Financial Modeling Fundamentals) — **Level 1**

Learn tips and tricks for Excel model builders, how to audit your financial models, how to use better formulas, and how to monitor and handle uncertainty using scenario planning.

$180 — 2/3 Passport Day — 4 CPD Hours

Financial Analysis Fundamentals — **Level 1**

Learn how you can perform a financial analysis on any organization using a wide variety ratios derived from its financial statements.

$120 — 1/2 Passport Day — 4 CPD Hours

Math for Corporate Finance — **Level 1**

Learn how a number of mathematical formulas can be used to conduct detailed analysis on a set of data and/or variables.

$60 — 1/3 Passport Day — 2 CPD Hours

Behavioural Finance Fundamentals — **Level 2**

Learn about the wide range of decision making biases and information processing errors that influence our financial decision making.

$90 — 1/3 Passport Day — 2 CPD Hours

Budgeting and Forecasting — **Level 2**

Learn to adopt a disciplined approach to developing budgets; forecast results with quantitative and qualitative methods; effective use variance analysis to track performance; and present results with charts and graphs.

$250 — 1 Passport Day — 4 CPD Hours

Building a Financial Model in Excel — **Level 2**

Learn the many hallmarks that make financial models robust; best practice techniques in planning model structure; and how to forecast the income statement from operating revenues down to operating profit.

$250 — 1 Passport Day — 4 CPD Hours

Business Valuation Modeling — **Level 2**

Learn to perform detailed business valuation modeling using three main methods: Comps, Precedents and DCF Analysis.

$180 — 2/3 Passport Day — 4 CPD Hours

Excel Dashboards & Data Visualization — **Level 2**

Learn how to build a custom Excel dashboard using professional data visualization techniques, and obtain a solid understanding of how to tell a story by combining data, charts, graphs, and other visuals.

$90 — 1/3 Passport Day — 2 CPD Hours

PowerPoint & Pitchbooks — **Level 2**

Learn the most advanced functions, tips and best practices for presentation design to be a distinguished PowerPoint user.

$180 — 2/3 Passport Day — 4 CPD Hours

Rolling 12-Month Cash Flow Forecast — **Level 2**

Learn to build a cash flow model from scratch complete with assumptions, financials, supporting schedules and charts.

$180 — 2/3 Passport Day — 4 CPD Hours

Advanced Excel Formulas — **Level 3**

Learn the most advanced formulas, functions and types of financial analysis to be an Excel power user.

$60 — 1/3 Passport Day — 2 CPD Hours

Corporate & Business Strategy — **Level 3**

Learn the most important terminologies, theories, concepts, and frameworks on strategy and be guided through a comprehensive strategic analysis process.

$60 — 1/3 Passport Day — 2 CPD Hours

Financial Modeling Using VBA — **Level 3**

This course provides participants with the skills needed to incorporate Visual Basic for Applications (VBA) into financial models.

$180 — 2/3 Passport Day — 2 CPD Hours

Leveraged Buyout Modeling — **Level 3**

Learn how to set up and build an LBO model step-by-step.

$250 — 1 Passport Day — 6 CPD Hours

Mergers & Acquisitions: Advanced Modeling — **Level 3**

This advanced course is designed for professionals working in investment banking, corporate development, private equity, and other areas of corporate finance that deal with analyzing M&A transactions.

$250 — 1 Passport Day — 4 CPD Hours

Mining Financial Model & Valuation — **Level 3**

Work through a case study of a real mining asset by pulling information from the Feasibility Study, inputting it into Excel, building a forecast, and valuing the asset.

$250 — 1 Passport Day — 4 CPD Hours

Real Estate Financial Modeling — **Level 3**

Learn step-by-step, how to build a dynamic financial model that incorporates sensitivity analysis of development costs, sales prices, and other aspects of development.

$250 — 1 Passport Day — 4 CPD Hours

Sensitivity Analysis for Financial Modeling — **Level 3**

This advanced course takes a deep dive into sensitivity analysis. By the end of this course you will have a through grasp of how to build a robust sensitivity analysis system into your financial model.

$90 — 1/3 Passport Day — 2 CPD Hours

Startup/eCommerce Financial Model & Valuation — **Level 3**

Learn to build a startup financial model from scratch complete with assumptions, financials, valuation, and output charts.

$250 — 1 Passport Day — 4 CPD Hours

ProDio Audio Learning Inc

CPABC is pleased to continue the innovative project with ProDio Audio Learning Inc. (ProDio), a Canadian Company based in BC. ProDio 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, fully produced audio-only courses that are engaging, concise and easy to listen to, testing your learning along the way. Course content includes expert interviews, interesting stories, sounds, 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. When purchasing ProDio courses through CPABC, you will be provided with a link to access your course via mobile app or web. Accessing your ProDio course on your smartphone will require you to download and install the ProDio mobile app which is available for free through the App Store and Google Play.

Available Titles

A Risky Business: Risk Management Tools

Presenter: Jordan Wilson LEVEL Intermediate-Advanced

If identifying, assessing, and managing risk plays a crucial role in your daily life, then this course is for you. It aims to strengthen your business and investment risk knowledge, so that you can successfully identify, assess, and manage those risks in your career and personal affairs.

$110 1/2 Passport Day 2 CPD Hours

Acing Your Strategy: A Leader's Guide to Successful Planning

Presenter: Russell Cullingworth LEVEL Intermediate

Using real-world examples, case studies and discussion with experts, this 2-part course will provide an engaging and thought provoking look at why planning is so important and why most managers and leaders fail to plan effectively.

$110 1/2 Passport Day 2 CPD Hours

Avoiding Identity Theft, Fraud and Cyber-Crime

Presenter: Kelley Keehn LEVEL General

This course teaches professionals how to protect themselves and their clients by recognizing and identifying the latest scams, threats and trends. Learn the red flags through real stories and examples, so you and your clients can better spot current and future scams.

$110 1/2 Passport Day 2 CPD Hours

Avoiding Investment Fraud

Presenter: Kelley Keehn LEVEL Introductory

Award winning and best-selling author, Kelley Keehn, will guide listeners through the often-devastating world of investment scams. Learn the trends of investment frauds, hear from government officials and experts that are at the front lines.

$60 1/4 Passport Day 1 CPD Hours

Client Acquisition: Ethical Strategies for Attracting and Retaining Great Clients

Presenter: Bruce Fern LEVEL Intermediate

This course is for accounting professionals who want to improve their skills in engaging with clients or customers. Learn effective client acquisition techniques and how to apply proven client acquisition practices in a way that is consistent with the International Code of Ethics for Professional Accountants.

$110 1/2 Passport Day 2.5 CPD Hours

Conflicts of Interest Unpacked

Presenters: Brian Friedrich & Laura Friedrich

LEVEL Intermediate-Advanced

Learn about some of your key professional obligations regarding conflicts of interest, and determine how to recognize situations that might pose conflicts of interest so that you can avoid them or deal with them effectively. **This seminar contains 1.25 hours of ethics content.**

$70 1/3 Passport Day 1.25 CPD Hours

Conversations in the Boardroom, in the Hallway

Presenters: Brian Friedrich & Laura Friedrich

LEVEL General

Explore decision-making in the boardroom and in the hallway, and look at ways to enhance an ethics-based culture no matter what your role is. We'll also explore the International Ethics Standards Board for Accountants' proposed broadening of professional skepticism and judgment guidance for professional accountants. **This seminar contains 2.5 hours of ethics content.**

$110 1/2 Passport Day 2.5 CPD Hours

Focus on Change: Change Management Essentials

Presenter: Dr. Hillary Curry, Ph.D.

LEVEL Intermediate

This course packed full of expert knowledge on the "real-world" of change management. From your approach to types of change, behavior and history to how to integrate various practices such as design thinking, systems thinking and graphic recording into your change toolkit - you'll gain practical insight that will help with your next change project.

$110 1/2 Passport Day 2.5 CPD Hours

Leading Digital Transformation

Presenter: Robert Gilfoyle

LEVEL Intermediate-Advanced

Digital technology (DT) is driving massive change in the workplace. This course covers the most critical knowledge and skills needed to become an effective 'digital leader' – someone who can thrive in a leadership role in this new and challenging environment.

$110 1/2 Passport Day 2 CPD Hours

Leading Through Influence

Presenter: Russell Cullingworth

LEVEL Introductory-Intermediate

Content includes: What is influence and why is it important; emotional intelligence and influence; social management and the permission to influence; 5 influencing styles; push vs. pull leadership; and a practical model for influencing.

$110 1/2 Passport Day 2 CPD Hours

Lies, Alternative Facts and Professional Skepticism

Presenters: Brian Friedrich & Laura Friedrich

LEVEL Intermediate

Examine and de-bunk common examples of ways to present questionable or misleading messages, and learn how to spot deceptions and out-of-context illustrations, and how to apply critical thinking to ask probing questions and sharpen our responses. **This seminar contains 2 hours of ethics content.**

$110 1/2 Passport Day 2 CPD Hours

Promoting Employee Engagement

Presenter: Monica Affleck

LEVEL Intermediate-Advanced

Having committed and high-performing employees who freely give their discretionary effort is of critical importance; it is a competitive advantage that can set your organization apart from the competition. Learn about employee engagement best practices that you can apply directly in the workplace to help raise engagement levels in your organization.

$110 1/2 Passport Day 2 CPD Hours

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Tina Varughese
PROFESSIONAL SPEAKER & TRAINER
President, tWorks

Tina will share impactful takeaways on how to use differences and diversity in your workplace to create a successful future.

Paul Krismer
CHIEF HAPPINESS OFFICER
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Paul will show you how to embrace and achieve gender equity, a key business success factor.

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Seminar Leaders

We are proud to introduce our instructors for the Spring/Summer 2020 PD Program. We thank these committed professionals for the time and talent they contribute to our seminars. If you, or someone you know, would be interested in developing or teaching a seminar, please contact:

Simone Leonard, CPA, CGA
Vice President, Education and Professional Development
Email: sleonard@bccpa.ca

ASIF N. ABDULLA, JD is a partner at the Vancouver office of Thorsteinssons LLP, Tax Lawyers, practicing primarily in the area of domestic and international tax planning for individuals, trusts, corporations, partnerships and other private enterprises. Asif's practice is focused on advising individuals and businesses in respect of succession and estate planning, tax-driven corporate reorganizations, immigration/emigration tax planning, business structuring and cross-border tax planning. Asif acts for a number of clients who are in dispute with the CRA and provides advice in respect of the Voluntary Disclosure Program.

BRUCE ACTON B.Sc., M.B.A., F.C.M.C. (retired), was educated at the University of British Columbia where he received a Bachelor of Science degree. He then completed a Masters Business Administration degree at the University of Alberta. He teaches a number of professional development course for CPA's organizations Canada and internationally. He has worked with a number of organizations in both the private and public sector from small manufacturers to large service firms. His consulting work has been recognized with four Alberta Premiers Awards for Excellence and nationally with an award from the Institute of Public Administration of Canada.

TEJINDER BASI is currently the founder and CEO of Cyberium Consulting, and has over 30 years of experience in Business Leadership, IT Consulting, Audit & Cybersecurity across Europe and North America. Tejinder was a partner at Deloitte Canada for 16 years, leading their Cybersecurity, Risk Management and Data Analytics divisions. He also worked at PwC UK, leading business and IT controls audit innovation. He has advised both public and private sector organizations on the effective and secure use of leading technology.

KARINE BENZACAR, MBA, FCPA, FCMA, CFA is a seasoned industry professional with over 20 years of industry experience. After beginning her career in the finance departments of Avon Products and Kraft Foods, she held Senior Management positions at three major Canadian Banks – Royal Bank of Canada, Bank of Nova Scotia, and Bank of Montreal. Her career has spanned many functional areas including accounting, finance, capital markets, project management, re-engineering, and strategic management. She has performed consulting work, developed financial courses, and trained thousands of professionals from a wide variety of industries.

YOGESH BHATHELLA, CPA, CGA, CFP, TEP is a Partner with KPMG's Enterprise Tax practice based in the Langley office. He has more than 20 years of experience providing tax and estate planning advice to private clients in a variety of industries. Yogesh has extensive experience advising private corporations and high net worth families on a broad range of taxation and business matters including business reorganizations; wealth, gift and inheritance tax planning; trust and estate services; succession planning; and buying and selling a business.

WARD BLATCH, CPA, CA provides consulting and training services as a partner with K2E Canada throughout the United States and Canada. The professional development courses presented by Ward include cloud computing, business intelligence, security, technology updates, internal controls, paperless office, mobile office, Adobe Acrobat, Excel, Word, PowerPoint and Outlook. Ward obtained his CPA, CA designation while working at a Nova Scotia regional accounting firm before starting his own consulting and accounting practice. His practice provides accounting, tax, training, support, and network evaluations for small businesses and not-for-profit organizations.

JIM BROSSEAU is passionate about rethinking traditional team practices for today's diverse world - to be practical, situationally relevant, and adaptable. He sees the leadership role as one that intentionally cultivates an environment that brings out the strengths of everyone in the team. Jim brings a technology background and wide experience with government, non-profits, manufacturing and service-based teams. His primary focus is collaborative project leadership, and the power of aligning diverse perspectives into strong, cohesive teams. Jim has written two books, focused on technical teams and developing personal resilience.

GREGORY BUCK, CPA, CA, BCOMM, has been in public practice for 39 years specializing in owner managed and professional business. He has extensive experience in small to medium businesses from a practical standpoint. Greg has lectured extensively at UFV in the Business Computing and Business Administration departments and for accounting and work flow software companies. Greg has authored three textbooks in the business computing area and several articles and blog.

RHONDA CALDWELL is the founder of Caldwell Communications Inc., a Vancouver based management consulting and professional development company. As a business owner with over 20 years of corporate and entrepreneurial experience, Rhonda offers real world solutions that are immediately applicable. She has provided services to organizations across North America as a consultant, training designer, classroom facilitator and coach. She focuses on giving people the skills they need to enhance their personal and team performance, and strengthen their business relationships with colleagues and clients.

GREG CAMPEAU, B.COMM, is a learner and teacher of timeless truths that govern both personal and organizational effectiveness. Greg has delivered over 2900 presentations and workshops throughout North America, and for 15 years has instructed courses in the School of Business at BCIT. Greg's broad and riveting appeal is rooted in his relevant, meaningful, thought-provoking and practical content that is always delivered in an interactive, humorous and inspirational style.

MIKE COBURN, BA(HON), LL.B., is a partner with Fasken Martineau DuMoulin LLP and a member of the firm's tax group. He has considerable experience in structuring and implementing tax-efficient corporate reorganizations for both private and public companies. Mike also frequently advises clients on inbound and outbound cross-border investments, acquisitions and disposition of assets and disputes with various taxing authorities.

CHRISTIAN CODRINGTON, CHRP has an extensive background contributing to organizations of all sizes. These include being a Director at the Human Resources Management Association, managing HR groups at Starbucks Coffee Canada and Best Buy Canada, and HR and operations roles with government. His business education at Simon Fraser University is complemented by Mediation and Conflict Resolution certifications from the Justice Institute of BC

ROBIN DIEHL, CPA, CA, CBV is a business valuator and a business analyst. Robin has vast experience presenting internal and external courses, including courses for undergraduates, professional designations and private firms. She has helped author various accounting courses and composed professional examination questions. Her areas of focus include financial accounting, financial reporting and assurance topics.

DAN EISNER, CPA, CA is an Employee Benefits Advisor at ZLC Financial. Dan's passion is working with human resource and finance professionals that 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. Dan partners with organizations to develop proactive, creative and relevant solutions that are better than the same old solutions used for the past 20 years.

LAURA FRIEDRICH, MSc, CIA, FCPA, FCGA is a principal of friedrich & friedrich corp, a professional research, standards, and education consultancy firm. The firm has over 20 years experience conducting projects throughout North and South America, Asia, and Eastern Europe. Major projects focus on organizational structure, program construction, and evaluating, designing and advising on best practices in competency-based education and experience assessments. Laura has led hundreds of professional development sessions in a wide range of topic areas including governance, leadership, ethics, project management, curriculum and exam development, and IFRS and ISAs.

ROB GILFOYLE is an expert on what leaders in organizations have to do differently and more of, to leverage the opportunities that new technology provides. Rob has substantial practical experience of leading change initiatives in North America, Europe, and Africa, including Fortune 500 companies. He regularly provides highly-rated PD seminars on leadership to CPAs in BC, Alberta, and Saskatchewan. All of Rob's presentations are highly interactive and feature very usable leadership tools and techniques.

TOM GILLESPIE, CPA, CA is a partner with Clearline Consulting CPA and Clearline Consulting. Tom provides audit, review, compilation and other advisory services to companies throughout British Columbia in numerous industries as well as to various not-for-profit organizations. In his role at Clearline Consulting, Tom provides file compliance, monitoring, in-house training, audit planning and on-going consulting services to CPA firms and practitioners, helping them succeed and build thriving practices. Tom also acts as a consultant and volunteer with CPA Canada and CPABC.

KAREN GRANVILLE, Hons. BMath, is a senior associate with K2E Canada Inc and has conducted over a hundred seminars for the CPA Associations across Canada. Karen has run her own training and consulting company for over 20 years. Karen specializes in teaching all the Microsoft Office products at an Advanced level.She has also developed and delivered for over 10 years customized productivity workshops using Outlook.

JOHN N. GREGORY, LL.B. is a partner in Thorsteinssons LLP, Tax Lawyers, and a member of the Bars of BC and Ontario. Mr. Gregory has practiced tax law for over 30 years, including a secondment as a senior rulings officer with the CRA. Mr. Gregory practices primarily in the areas of real estate taxation, corporate reorganizations, estate planning, and international tax planning.

TERRY GUNDERSON, CPA, CA, is a quality assurance consultant assisting CPA firms to meet assurance and accounting standards. He retired as a partner with Manning Elliott LLP after many years serving auditing, financial accounting and tax clients. He was a member of the firm's quality control and accounting standards committees during 15 years with Manning Elliott LLP. He acted as leader for the firm's quality monitoring program for 10 years. Terry has given seminars on auditing and assurance standards (including CSRE 2400, ASPE and ASNPO) for over 25 years.

MARGARET HOPE, M.ED., has been providing education programs for accounting professionals since 1988. She has a Masters Degree in Education, is an Internationally Accredited Professional Speaker – one of fewer than 85 speakers ever accredited worldwide, and the author of You're Speaking – But Are You Connecting? Margaret trains groups and provides speech coaching for a wide range of Business, Association and University clients. In addition to public speaking and presentation Margaret has expertise in virtual meetings and virtual training.

GEOFFREY HOWARD, LL.B. is Associate Counsel at MEP Business Counsel, where he provides strategic and practical advice on employment and labour law and represents clients in employment-related litigation. Geoff has extensive experience representing both employers and employees in all aspects of the employment relationship, including employment agreements, employment policies, compliance with employment legislation, termination of employment and human rights issues. He also advises and represents clients in disputes over post-employment competition. He is currently a Lead Partner, board member and active member of the Opportunities Committee for Social Venture Partners.

CHRIS IRELAND, B.COMM, CPA, CA, TEP, is Senior Vice-President, Planning Services with responsibility for PPI Advisory's national planning services team which provides advanced professional expertise and support in financial, estate and succession planning. He joined PPI in 2003 with over 20 years of experience in tax, estate and trust planning including several years as a Tax Partner in the Vancouver office of an international accounting firm. Chris has taught CPA Canada's specialized tax course, "Advanced Tax Issues for the Owner Managed Business" and has written extensively in the area of tax planning and wealth preservation.

SHAWN IRELAND, PhD is a founding partner and managing director of HRCgroup, Inc. He works extensively with Fortune 500 companies, foreign governments and international aid agencies. His expertise includes fostering critical thinking, strategic change, virtual teamwork, and managing human behaviour. He's Program Director and Chair of the Master of Arts in Organizational Psychology programs at Adler University in Vancouver.

RICHARD JANG, BCom, DipIT, MCP, CPA, CGA, is a member of the Sage Software Product Design team working on accounting and business management software. His focus includes reporting, business analytics and intelligence, helping companies in North America and internationally become more productive with information technology. He has presented multiple technical sessions at corporate conferences in the U.S. and overseas.

CHELSEA JIANG is a Vice President at Deloitte Corporate Finance practice in Vancouver. Chelsea advises mid-market companies across a variety of sectors on divestitures, acquisitions, and financing. Over the past 6 years, Chelsea led several notable transactions in B.C. including the recapitalization of Organika Health Products to a New York based private equity firm, and the recapitalization of Custom Air Conditioning to CAI Capital Partners. Chelsea holds a Bachelor of Business Administration from Simon Fraser University.

ED KROFT, Q.C., CPA (Hon.), is a partner of Bennett Jones LLP. Ed resolves tax disputes and conducts tax litigation. He is recognized as a top tax advisor in international guides and directories. Ed was the recipient of Canadian Tax Foundation's first annual Lifetime Contribution Award and was also awarded the Queen Elizabeth II Diamond Jubilee Medal to recognize contributions to the Canadian Tax Foundation. He is also the recipient of the 2006 CICA Award for Excellence in Income Tax Practice and Education for outstanding contribution to the profession and the Canadian tax community.

SIMON LINDLEY is an international trainer, speaker and consultant in business transformation through analytics, working across Asia, Europe and North America. He brings expertise in Visual Analytics and Dashboard design to transform traditional reporting ('Descriptive Analytics') and works with technical teams implementing 'Predictive' and advanced analytics solutions. Simon is a Chartered Accountant, Chartered Engineer (IT) and MBA with a Masters diploma in corporate governance. He also has training and qualifications in statistics and data science.

ALVIN LUN, J.D. practices tax law at Thorsteinssons LLP in Vancouver. His practice focuses on domestic and international tax planning for individuals, trusts, and corporations, as well as representing taxpayers in their disputes with the Canada Revenue Agency. Alvin is fluent in Cantonese and Mandarin Chinese. Prior to joining Thorsteinssons, Alvin completed a judicial clerkship at the Tax Court of Canada and articled at a national law firm.

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. 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. She has worked for both private and public companies, has participated in raising over $50M in funds, and has experience in international initiatives.

THE MARQUEE GROUP is the leading Canadian provider of financial modeling training programs at financial institutions, corporations, universities and professional societies. Since 2002, The Marquee Group has provided financial professionals with the tools they need to understand and master critical areas of financial modeling, valuation and analysis. The firm's partners are Ian Schnoor, Tim Benson, Dave Thomas and Jon Zelman. They have led courses in Canada, the United States, the United Kingdom, Australia and Mexico. They each have significant experience working in capital markets and a passion for teaching.

LESLEY-ANN MARRIOTT, PCC, CEC holds the advanced credential of Professional Executive Coach. As a former executive, she developed her skills in the competitive world of the big box retail business at the senior leadership table. She has invested thousands of hours coaching senior leaders and teams, many of whom are professional accountants. Described as "edgy and fun", her sessions are highly interactive and entertaining. Lesley-Ann is Principal at Marriott Management Group, Associate Faculty at Royal Roads University – Executive Coaching Program, Faculty for CPA's Executive Leadership Program and Senior Associate of Personal Strengths Canada – Core Strengths.

GAVIN MARSHALL, BA (Hons), LL.B, is a partner at Roper Greyell LLP focused on providing strategic human resources and employment advice. He has a broad range of knowledge in employment and labour law, wrongful dismissal and contract disputes, enforcement of restrictive covenants, labour relations law, picketing issues, crisis management and Occupational Health and Safety law. Gavin is an active member of CPHR (BC and Yukon) and a frequent speaker in legal education. He is the author of the BC Employment Standards Act: Quick Reference, and has been recognized as a leading employment and labour lawyer in Who's Who Legal, Carswell.

KEITH MARTIN, CPA, CA, MBA obtained his professional designation in 1990 and practiced in the area of Recovery and Insolvency Services until 1998. Keith moved to industry as Chief Financial Officer of a growing contracting firm, where his time and efforts were equally applied to all aspects of the business, including HR, strategic planning and operations. In January 2011, Keith established H•M Advisors, a business advisory practice focusing on providing critical business planning and system development for entrepreneurs and their growing companies. Keith's style of presentation is well received by all participants.

DIANE E. McDONALD, CPA, CA is a sole practitioner and has been in public practice for over 30 years, providing consulting, monitoring and professional practice services throughout B.C. Diane assists companies and practitioners with Canadian and SEC financial reporting obligations and provides accounting and financial reporting consultation services on the application of IFRS, ASPE, ASNFPO and U.S. GAAP. She develops and provides professional development training for preparers of financial statements, their auditors or accountants and provides monitoring, EQCR and other services to practitioners.

ROGER MERKOSKY, CPA, CA, is an independent consultant. He recently served as Director, Regulation, for CPABC, and currently serves as secretariat to the CPA Canada Other Regulated Services Task Force. His previous experience includes ten years with a Big 4 accounting firm, including four years in the national office specializing in professional development and practice advisory services. Roger also has significant experience in industry, spending ten years with AB InBev, holding senior financial roles based in Belgium, Croatia, and most recently in Toronto where he served as CFO of Labatt. Roger serves on the Board of Directors and is Chair of the Finance & Audit Committee of Vantage Point.

DAVID MILLETTE, CPA, CA, combines his people skills and expertise in business, accounting, and technology to design meaningful and practical client solutions that improve automation and workflow. David obtained his CPA, CA designation, and founded his firm in 2011. As a sole practitioner, he quickly realized the importance of utilizing technology when performing traditional accounting services and internal functions. As time went on, this became his passion. Nowadays, he designs business tools in VBA, integrates and maximizes new and existing software, and has a unique ability to find solutions using in-house resources.

MARK MORAN, CPA, CA, is a Director with Cyberium Consulting and has over 25 years of public accounting, assurance and advisory experience, leading and coordinating projects of all sizes with many leading organizations in Western Canada and North America. Since 1996, Mark has predominantly focused on internal control, risk management, IT audit and security, and assurance with respect to complex business processes and information systems. Mark is passionate about sharing his knowledge with others and is an accomplished educational speaker on a variety of topics related to IT audit, risk management, internal control, internal audit, and IT security.

DR. JIM MURRAY is CEO of optimal solutions international, a firm dedicated to helping people and organizations achieve their full potential. Jim has created and taught courses for CPABC since 1982. He holds four degrees, is the architect of several advanced executive development programs for four provincial CPA bodies, has published three best-selling books and provided strategic counsel to over 600 organizations. He has been nationally honoured by the university community and his courses formally recognized for "excellence in innovation and design".

SHANE ONUFRECHUK, FCPA, FCA, is a Partner, Tax at KPMG LLP. Shane's focus in the firm is in the area of Canadian Corporate Tax with an emphasis on PPP project finance structuring, corporate reorganizations, acquisitions and providing tax advisory services to other professionals. Shane speaks at CPABC PD events, plays an active role in CPABC professional development, and had been involved in teaching and course development for the CPA Western School of Business as well as the Sauder School of Business.

JIM C. OTAR, is a retired financial advisor and a retired engineer. He is the author of several books, the latest one is "Unveiling the Retirement Myth - Advanced Retirement Planning based on Market History". His articles are published in various magazines in Canada, U.S. and Australia. He won the prestigious CFP-Board Award in 2001 and 2002 for his articles, the first Canadian to win such a prestigious award. He is the founder of www.retirementoptimizer.com.

DAVE PARADI has been recognized by the media and his clients as a data presentation expert. He has authored ten books on effective presentations with PowerPoint and Excel. He is one of fewer than ten people in North America currently recognized by Microsoft with the Most Valuable Professional Award for his contributions to the PowerPoint & Excel communities. His ideas have been published globally. His workshop participants leave with practical steps that can be utilized immediately.

PAM PENNER has extensive experience working in the field of conflict resolution as a mediator, facilitator, coach and trainer. In private practice since 1998, and as a member of the instructional team at the Justice Institute of B.C., she specializes in helping individuals develop their communication and conflict resolution skills. As a coach, she works with individuals to manage the conflict within, tap into their resourcefulness, and achieve personal goals.

SCOTT POWELL, CPA, CA is a Chartered Professional Accountant and a UK Chartered Accountant. Scott is a managing director at Corporate Finance Institute and an adjunct professor with SFU Beedie School of Business. He has designed and delivered finance and management development workshops around the world for numerous corporate and banking clients. Scott holds an honours degree in Politics/Economics from Trent University and a master's degree in Economics from Cambridge University.

RICHARD PRESS, LL.B., is a member of the DLA Piper (Canada) LLP employment and labour law group. His practice focuses both on advocacy and strategic planning with respect to employment and labour matters, as well as related administrative tribunal work, such as human rights, workers' compensation and employment standards. As an advocate, Mr. Press has appeared before provincially and federally appointed arbitrators, the British Columbia courts, the provincial and federal labour boards, and various tribunals.

JEFF PRICE, CPA, CGA is an Associate with Learning Strategies Group. He brings over 30 years of customer service, leadership, financial, and training expertise to the LSG team. Having worked in senior management in the private sector; director in a senior government, as well as in several director roles for Chambers of Commerce and soccer organizations, Jeff's expertise ranges from managing and leading change, to financial statement, pro forma and business case development and includes delivery of governance, ethics, sustainability, financial and procurement training.

STEPHEN PRIDDLE, CPA, CA, CMA is Vice-President, Finance and CFO of SureWx Inc. Stephen worked with KPMG, before working for several different companies prior to joining SureWx. He has gained a wide range of financial reporting, treasury management, mergers & acquisition and other experience. Stephen has created and delivers several seminars for controllers and CFOs, has taught in professional and university programs and is a prolific author of published case studies. He advises a number of businesses and not-for-profit organizations, and sits on the Board of SureWx.

KEN PULS, FCPA, FCMA, is a world respected speaker, trainer, author, blogger and community leader when it comes to self-service business intelligence using Microsoft tools. With over 20 years of corporate accounting and IT experience behind him, Ken founded Excelguru Consulting Inc (www.excelguru.ca) and the Power Query Academy (www.powerquery.academy) whose goals are to help users get the most out of Microsoft Excel and Power BI. An expert in his field, Ken has received many accolades including the prestigious Microsoft MVP award, which he has been re-awarded each year since 2006.

JONATHAN ROBINSON, MA, MFT is a psychotherapist, author, and professional speaker. He has reached over 100 million people around the world. Jonathan has appeared on the Oprah Winfrey and other TV talk shows, CNN, and CNBC. Among his books are: *Shortcuts to Success, Instant Insight, Find Happiness Now* and *Communication Miracles for Couples*. His specialty is teaching simple techniques that have a profound impact on the quality of one's life, and providing audiences with immediately useful information in an entertaining manner.

KELSEY ROSTE, CBV, BA, is a workshop leader and facilitator with Learning Strategies Group. She has 15 years of experience in deal identification and execution, business valuation, commercial integration and negotiations, economic modelling, financial budgeting, and joint venture relationship management. Prior to joining Learnings Strategies Group, she was responsible for the economic modeling and commercial contract integration for the project financing of a $20 billion LNG development project in BC.

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. His research centres around the strategic management of technology and innovation, with a particular focus on how blockchain and other new technologies impact how firms organize, create and capture value, and compete. He teaches blockchain topics at undergraduate, graduate (MBA) and executive levels. Chris received his Doctorate in Science, in the field of Technology Strategy and Venturing, from Aalto University in Helsinki.

SHANE SCHEPENS, CPA, CA, is a tax partner with Clearline CPA. Shane provides income tax planning, reorganizations, and succession planning services for Canadian owner-managed businesses in various industries. Shane graduated from the University of Northern BC and obtained his accounting designation in 2003. Shane previously worked for a large international and a local mid-sized accounting firm before opening his own accounting and tax practice in Surrey, which operated for four years before merging with Clearline CPA. Shane performs a significant amount of consulting work with other public practitioners assisting them with their client's tax compliance, planning and corporate restructuring needs.

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).

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 has presented on the brain for over 33 years to organizations around the world. His knowledge, warmth, humour and dynamic presentation style have made him a much sought-after speaker at workshops and conferences. Terry often appears on TV, radio, and in the press. He recently appeared on BCTV, Global, CKNW and Student Success. His presentations are practical and based on the latest brain science.

A.G. (SANDY) STEDMAN, FCPA, FCA, has been a partner with Schibli Stedman King in Victoria since 1996. Prior to joining SSK Sandy's career included, internal audit, controllership, and a range of public practice experience. He has been a course author and instructor for the ICABC/CPABC and other provincial professional accounting bodies since 2002. His practice includes accounting and tax advice for professionals, owner managed business, high net worth individuals, and groups of privately held companies.

MIKE STUBBING, FCPA, FCA, CFP, TEP is a tax partner with Grant Thornton LLP in Victoria. His practice focuses on providing tax advice to owner-managed businesses. Mike is Grant Thornton's former national leader for Succession and Estate Planning.

SANDRA SUH, CPA, CA, CBV, is currently leading the due diligence practice at Deloitte's Financial Advisory group in Vancouver. Sandra's focus is working with clients to provide merger and acquisition services as well as business valuation services in various industries, with a more specific focus in cross border transactions. She started her career at Deloitte in the audit group in Montreal and has experience in providing M&A services to both financial and strategic investors throughout Canada and in Korea. Sandra is also a CPA in the state of Illinois and a Chartered Business Valuator.

FRED TANG, CPA, CA, CBV, is an experienced valuation and financial advisory professional providing services in the practice areas of business and securities valuations, M&A and divestitures, transaction support, financial reporting, due diligence services and litigation support. He is qualified as an expert witness and has provided expert testimony in the Supreme Court of British Columbia. Fred provides his valuation and advisory services to clients in his role as a Principal, Valuation and Advisory Services at Davidson & Company LLP and is based in Vancouver, Canada.

SEBASTIAN TAYLOR, a consultant for the Corporate Finance Institute and associate for Learning Strategies Group, has a degree in Economics and Finance, and has spent the last 12 years working across Energy, Finance and Retail delivering complex analytical and automation solutions. Seb is a passionate believer in automation, and has used Power Query, Power Pivot, Excel, VBA and Power BI extensively to automate repetitive data transformations and analyze complex data sets.

TRACY THEEMES, MA, CFP, FCSI, FDS, is Financial Advisor and co-founder of Sophia Financial Group, Raymond James. Prior to that, Tracy worked as a financial consultant with Smith Barney, a US brokerage firm and after returning to Canada was an advisor with a large bank owned investment firm. She has an M.A. in Counselling Psychology and is a Certified Financial Planner, insurance licensed and a Fellow of the Canadian Securities Institute. Tracy was recently awarded the International Alliance of Women Global 100 Award for her work in empowering women through education.

DAVID G. THOMPSON, B.COMM., LL.B., TEP, is a partner with Thorsteinssons LLP, Tax Lawyers. He has practiced exclusively in taxation matters since 1985, and is a registered trust and estate practitioner certified by the Society of Trust and Estate Practitioners. He was a governor of the Canadian Tax Foundation. Dave is noted as a leading Canadian tax lawyer based on peer-review ratings in Lexpert and in Martindale-Hubell. He is noted as a leading Canadian tax lawyer and a leading Canadian trust and estate lawyer based on peer-review ratings in The Best Lawyers in Canada.

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

DAVID TRAHAIR, CPA, CA, is a personal finance writer, trainer, and eLearning content developer. He is also a national best-selling author. His books include Smoke and Mirrors, Enough Bull, Crushing Debt, Cash Cows, Pigs and Jackpots and his latest The Procrastinator's Guide to Retirement. Canadians appreciate the fact that his views are totally independent because he does not sell any financial products. He currently operates his own personal finance training and eLearning development firm and offers seminars on his books to organizations including CPA provincial bodies across Canada.

SHAWN TRYON, LL.B. practices tax law at Thorsteinssons LLP in Vancouver. Shawn's practice focuses on tax planning for individuals, trusts and corporations in both domestic and international matters, including: estate planning, corporate reorganizations and business structuring. Shawn also deals extensively with tax litigation matters from the audit stage through to the appeal stage. Shawn received a BA in 2000 from SFU, an LLB in 2004 from UBC and was called to the British Columbia Bar in 2005. Shawn is a member of the Canadian Tax Foundation and the Canadian Bar Association.

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.

BARBARA VANDERLINDEN, FCPA, FCMA is the principal at View Consulting specializing in strategic planning, financial management, program reviews and evaluations. She has been an instructor at Camosun College, Royal Roads University and UVIC focusing on managerial accounting and has been involved in facilitation and teaching with CPABC for almost 20 years.

HELEN WALE, MA, CPHR, CEC, PCC is an Associate with Learning Strategies Group. She holds the Professional Certified Coach designation and is a trainer facilitating workshops primarily in leadership development, employee engagement and coaching. Prior to joining LSG, Helen spent over 26 years in generalist and leadership roles within human resources and organizational development in several organizations in both the UK and Canada. With a Bachelor of Arts degree in History, Helen is also Chartered Professional in Human Resources (CPHR), holds a Masters degree in Human Resource Management, a Graduate Certificate in Executive Coaching and is certified to deliver MBTI workshops.

ROSANNE WALTERS, CPA, CA, CBV, CFE is the President of Walters Financial Forensics Ltd. She has over 25 years experience in fraud investigations for various purposes including insurance recovery, civil claims and criminal prosecutions. She also has experience assisting clients with fraud prevention including fraud risk assessments and implementation of controls to deter and detect fraud. Rosanne has qualified as an expert witness and given testimony in the Supreme Court of British Columbia on fraud-related matters.

IAN WANKE, CPA, CA, CFA, CBV works within the Private Equity team at British Columbia Investment Management Corporation (BCI), where he and his colleagues invest in privately held, global companies. BCI is a Victoria based asset management firm with more than $140 billion of assets under management. Previously, Ian was a Vice President at Deloitte's Mid-Market Corporate Finance practice in Vancouver where he advised mid-market companies across a variety of sectors on acquisitions, divestitures, and financing. Ian has led several notable transactions in B.C. Prior to Deloitte, Ian was at a boutique private equity firm.

GARRETT WASNY, MA, CMC, CITP/FITP, is an award-winning Internet speaker, author, professional development technologist and former management consultant for Price Waterhouse. He's published three books, written hundreds of articles and columns on Internet strategy, and delivered more than 1,000 seminars and webinars to CPAs and accounting organizations worldwide on how to thrive online using the latest search, productivity, mobile and social tools.

MARION WILLIAMS, FLMI, has over 20 years of experience in business management solutions. She is a senior associate with K2E Canada Inc. and has conducted over a hundred seminars for CPA bodies across Canada. As the owner of a computer consulting company, Marion provides software training and develops databases. Marion teaches the Microsoft Office suite, Word, PowerPoint and Outlook, specializing in Access and Excel. In addition, Marion designs, develops, tests and implements custom Access databases using VBA where necessary.

TERENCE WONG, CPA, CA, CPA (Illinois), is the Director of U.S. and Internal Tax at Kingston Ross Pasnak LLP. Terence is a successful tax advisor with almost 30 years of experience dealing with multi-national taxation issues faced by individuals and corporations. Being both a designated Canadian CPA and U.S. Certified Public Accountant allows Terence to provide advice and instruction on accounting and taxation related matters arising from both countries. He has been an instructor for more than a decade for various CPA bodies, allowing him to gain invaluable experience in contributing to the growth of young professionals.

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

ALEX WRAY has over 25 years of experience as a trusted advisor, coach and facilitator of top teams and leaders throughout North America, and globally from Singapore to Switzerland. Alex has a passion to connect the science of habit change with the real-world context of performance. Central to his approach is the work of ground-breaking Harvard University Professors Bob Kegan and Lisa Lahey, and the phenomenon they describe as the Immunity to Change™. Alex has completed their highest level of certification.

KEVIN ZHAO is Senior Associate, M&A Advisory, Financial Advisory at Deloitte LLP. Kevin is an experienced M&A specialist providing divestiture advisory services for private mid-market businesses and buy-side and sell-side transaction due diligence for financial sponsors and strategic companies both public and private. He has ongoing and past transactional experience in the food & beverage, computer software technology, consumer products and services, manufacturing, real estate, aerospace and mining industries.

Phone 604 872.7222 **Toll free** 1 800 663.2677 **Fax** 604 684.1267 **E-mail** pdreg@bccpa.ca
Website pd.bccpa.ca **Address** 800-555 West Hastings Street, Vancouver, BC V6B 4N6

REGISTRANT INFORMATION

❑ CPABC MEMBER ❑ CPABC STUDENT ❑ OTHER

NAME COMPANY

ADDRESS ❑ HOME ADDRESS OR ❑ COMPANY ADDRESS

CITY PROVINCE POSTAL CODE

PHONE FAX E-MAIL

Special Dietary Requirements: If you have allergies or need other special meal considerations, please let us know at the time you register, so we can make the necessary arrangements with the hotel catering staff. Allergies only, not preferences.

SEMINAR INFORMATION

CODE	DATE	SEMINAR TITLE	FEE

Confirmations will be emailed within 1 business day upon receipt of registration. It is the attendee's responsibiltiy to confirm their registration in the event they do not receive a confirmation. Refunds cannot be provided for failure to receive a confirmation. All PD seminars are subject to the Terms and Conditions as outlined on the next page.

PD Passport Holders:

❑ Flexi PD Passport
❑ Personal PD Passport

PD Passport No.

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SUB-TOTAL

5% GST (GST No. 107508541)

TOTAL

PD PASSPORT

TO ORDER A PD PASSPORT **(A savings program for people who take multiple PD Seminars - for more information see page 6 or pd.bccpa.ca)**

Personal PD Passport: Qty ________ x $1,650 = _______________

Flexi PD Passport: Qty ________ x $2,050 = _______________

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TOTAL

PD PASSPORT ORDERS: All PD Passport Orders, (for both members and non-members), MUST be accompanied by payment to be processed. Please fill out the "METHOD OF PAYMENT" section below.

The undersigned has read, understood and agrees to be bound by the Terms and Conditions of the PD Passport as outlined on page 133.

NAME SIGNATURE DATE

PAYMENT

❑ Cheque Enclosed (payable to CPABC) Payment must accompany all registrations/orders.

PLEASE NOTE: Credit card Information can now only be accepted by phone. Ensure you enter a valid phone number on the form and we will contact you. Alternatively, you can register online at pd.bccpa.ca or call CPABC PD at 604 872.7222

PD SEMINAR TERMS & CONDITIONS

REGISTRATION AND FEES: To register, complete and return the registration form with payment to the CPABC PD Department. Payment of seminar fees are due at the time of registration, as we do not invoice for seminar registrations. Cheques should be made payable to CPABC. We also accept Visa and Mastercard, but please DO NOT include your credit card information in any email correspondence. All registrations are subject to GST regardless of employer or employment status.

CONFIRMATION NOTICES: A confirmation notice will be emailed to the registrant within 1 business day upon receipt of registration. Online registrations should generate a confirmation immediately if the transaction was processed successfully. If you do not receive your confirmation prior to the course date, please contact the PD Department. The confirmation notice is provided as a courtesy – all assessments apply whether or not a registrant receives a confirmation notice.

SEMINAR LOCATIONS AND DATES: Seminar locations and dates are subject to change. Every effort is made to ensure that current information is available. Please check the PD website at pd.bccpa.ca for the latest information on the status of seminars.

SEMINAR REGISTRATION CANCELLATIONS, TRANSFERS & REFUNDS: All cancellations and/or transfers must be received in writing. Telephone notifications will not be accepted. Cancellations/transfers received at least 10 calendar days prior to the seminar date will result in a full refund. Cancellations/transfers received less than 10 calendar days but more than 2 full business days prior to the seminar date are subject to an administration fee of $50 for full and half-day seminars, or $25 for 2-hour seminars. CPABC incurs overhead costs that cannot be avoided unless cancellations are received in advance of the deadlines.

Registrants who do not show up for a seminar, and/or who do not notify CPABC PD in writing at least 2 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. For free PD seminars a “no-show” fee will apply. 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. Please refer to respective program policies on our website.

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 a last minute scheduling problem, we reserve the right to substitute a fully qualified speaker who is not listed in the course description.

MEALS: 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 at free PD sessions. If you have allergies or special meal considerations, please let us know at the time of registration.

CLASS LIST

CPABC distributes classlists with your name and organization name at the seminar.

VIDEO/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 an concerns, please email the PD Department at pdreg@bccpa.ca.

WEB-BASED SEMINAR TERMS & CONDITIONS

The registration fees for web-based 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 web-based seminar, no refunds or substitutions will be granted.

PD PASSPORT TERMS & CONDITIONS

GENERAL CONDITIONS APPLYING TO ALL PD PASSPORTS

All 2019-2020 PD Passports are valid on CPABC PD passport valid seminars taking place between September 1, 2019 to August 31, 2020. They cannot be used to register for seminars or order products beyond the expiry date. Any unused portions of the PD Passports cannot be refunded, credited, or carried-forward.

PD Passports may not be used until payment is received in full, and may not be used retroactively for courses (or products) taken (or ordered) prior to their purchase. No other discount program may be used in conjunction with the PD Passports.

The PD Passport program is valid for CPABC PD sponsored seminars only. Some CPABC PD programs (e.g. CPABC Executive Programs) are passport invalid. The PD Passport is also invalid towards CPABC conferences that are not organized under the PD Program.

TRANSFERABILITY

Personal PD Passport – not transferable; only the holder can attend seminars using their Personal Passport.
Flexi PD Passport – this is the only type of PD passport that is fully transferable.

FLEXI PD PASSPORT – OFFICIAL CONTACT PERSON

For Flexi Passports, you must designate an individual as your official passport contact person. This individual, and no other, will be authorized to receive information on the passport usage, including registration details made under that passport. Individuals who register for seminars using the Flexi PD Passport are providing consent to share that registration information with the official passport contact person of that Flexi PD Passport.

SEMINAR CANCELLATIONS

(Applies to all PD Passports)
All cancellations or transfers of registration under PD Passports must be received in writing. Telephone notifications will not be accepted. Cancellations/transfers received at least 10 calendar days prior to the seminar date will not result in a penalty. Cancellations/transfers received less than 10 calendar days but more than 2 full business days prior to the seminar date are subject to an administration fee of $50 for full and half-day seminars, or $25 for 2-hour seminars, but the portion of the PD Passport used to register for the seminar will be restored. If the cancellation fee is not paid, the PD Passport portion will be forfeited instead.

Registrants who do not show up for a seminar, and/or who do not notify CPABC PD in writing at least 2 full business days prior to the seminar date (statutory holidays are not considered business days) will be assessed the full PD Passport portion of the seminar. There will be no transfers, credits, or carry-forwards – the portion of the PD Passport used to register for the seminar will be forfeited.

PD PASSPORT REFUNDS

There will be no refunds issued for PD Passports once your order has been processed. Please ensure that you evaluate and understand the type and terms of the PD Passport you are purchasing. Refunds will not be provided for unused passport days.

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800-555 West Hastings Street Vancouver BC CANADA V6B 4N6
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