CPA CHARTERED PROFESSIONAL ACCOUNTANTS BRITISH COLUMBIA

FALL | WINTER 2023-24

Professional Development

FINDING THE RIGHT SOLUTIONS

Fall/Winter 2023-2024

LIFELONG LEARNING:
Finding the right solutions

Welcome to your fall/winter PD Program! This year has seen many developments that will likely re-shape the business and finance landscape for years to come. The proliferation of AI and digital transformation being used in more everyday settings, a seeming permanence towards hybrid working, shifting trends in human resources and leadership models, and renewed focus on ESG regulations are all important factors that CPAs and other business professionals must be cognizant of.

Changes like these often create unforeseen problems, and possessing the means to deliver the best solution to any challenge can mean the difference between advancing - or stagnating or losing ground. This is why CPABC's Professional Development Program aims to provide you with key pieces to solving puzzles: knowledge, skills, and resources.

This fall, we continue to provide seminars and programs that focus on core technical skills for CPAs such as accounting, finance, tax, and wealth management, but we also recognize the importance for our members to be well-rounded leaders, skilled in areas like negotiation, teamwork, and strategy.

To ensure our program inventory continues to be current and relevant, we have added new titles in technology and innovation, ESG, leadership, management accounting, and of course financial reporting. Check out some of our new curated series and certificate programs as well.

Between January and August, your PD Program offered six free live webinars totaling 8 CPD hours and attended by approximately 4,500 members. These were also made available on demand. We will continue to offer free seminars to ensure that learning opportunities are accessible to all our members.

As the appettite for virtual seminars continues to be strong, the majority of live courses will be held through our online learning platforms. However, we will provide in-person options whenever practical.

We'd like to thank once again our talented pool of instructors, facilitators, and presenters - meet some of them on page 12. And of course, we extend our gratitude to you for continuing to participate in your PD Program.

Your CPABC Professional Development Team

Your Fall/Winter 2023-24 PD Program

YOU CAN SELECT FROM

470+
LIVE SEMINARS

400+
Online Virtual

70+
In-Person

410+
On-Demand Seminars

450+
Seminar Titles

QUALITY LEARNING OPPORTUNITIES

4.32/5
Average Course Rating
May 2022-June 2023

5/5
Highest Course Rating
May 2022-June 2023

FEEDBACK BASED ON

820
seminar offerings

27,000
registrations

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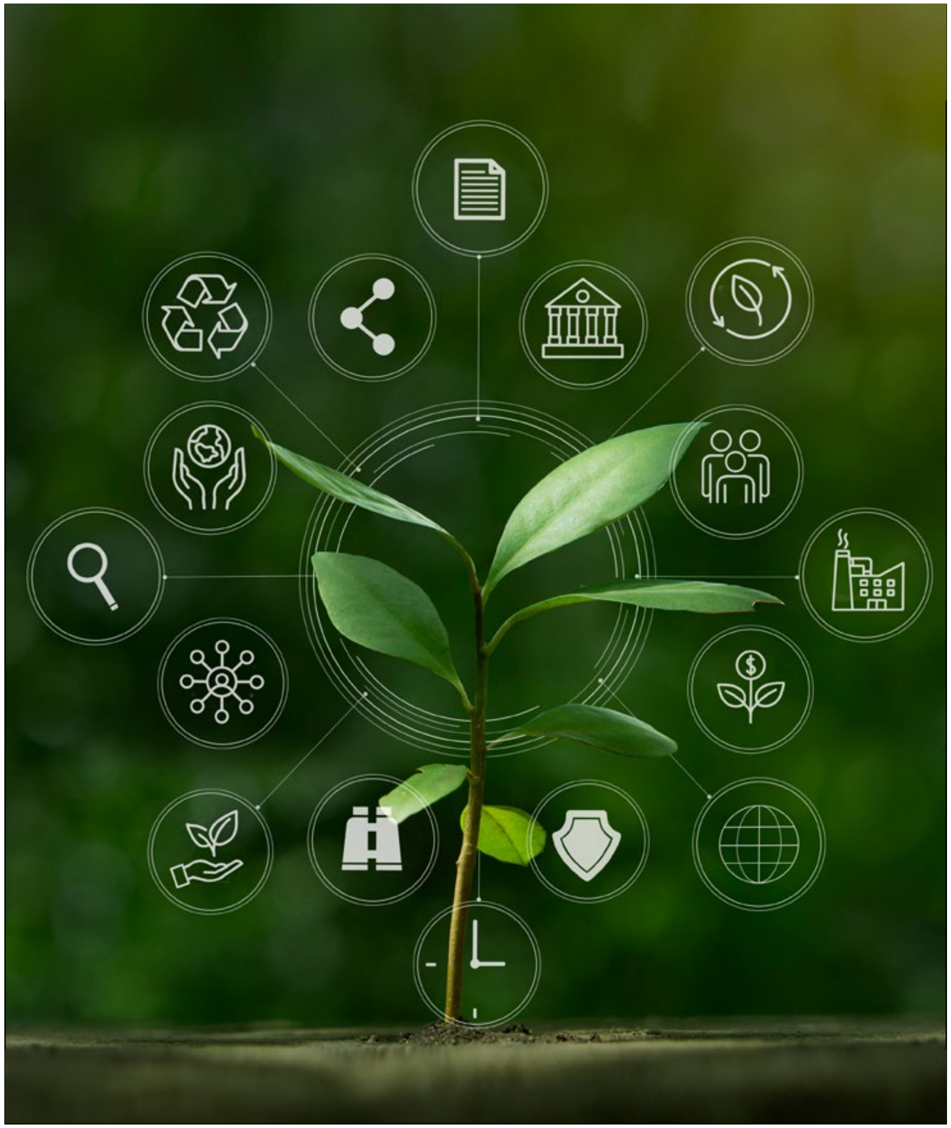

Environmental, Social, and Governance

In this podcast episode of Coffee Chats with CPABC, Lori Mathison, CPABC's president and CEO speaks to Rahul Arora, partner with ERM (a multi-national sustainability consultancy firm) on the benefits companies are experiencing from adopting ESG, as well as the latest international developments in disclosures and reporting frameworks. Acknowledging the growing importance of ESG, CPABC PD presents the following programs this fall and winter.

Explore the landscape of sustainability and ESG and how they relate to risks and opportunities through these new on-demand courses from CPA Canada. They provide in-depth analysis into ESG topics that are impacting various organizations across most sectors and industries.

- Introduction to Sustainability – A Multi-Year Retrospective
- Deep Dive into Sustainability – Understanding E, S, and G

ESG Series: Introduction to ESG Reporting
We are excited to present this new four-part series which will draw on local and other best-in-class examples of excellence in ESG reporting to keep you ahead of the curve with the latest reporting regulations.

- Introduction to ESG Reporting
- "E"nvironmental Factors
- "S"ocial Factors
- "G"overnance Factors

For those only interested in a brief introduction, the first segment, Introduction to ESG Reporting, is available as a standalone seminar.

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

Introducing your new Public Practice Series

This fall, CPABC PD is pleased to present a series of live webinars designed specifically for our members in public practice.

Our Public Practice Series is designed especially for our public practitioners to update their technical knowledge and address some key changes and challenges in professional practice in BC today.

Now is the time to connect with peers and explore new ideas with sessions on AMT, ethics, and technology.

Each session will cover relevant and practical topics to provide practitioners with reference materials and techniques to implement.

Women in Leadership now available as a mini-series or certificate program

Members enrolling in Women in Leadership can now choose the format that fits them best: certificate program or mini-series.

The certificate program will comprise live webinars followed by reflection and connection sessions. The mini-series will include live webinars only without the connection sessions, and can be completed over a shorter duration.

Both formats are designed with a focus on developing the skills, knowledge, and connection you need as a woman in the accounting profession to move forward in your career and leadership journey.

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

NEW Titles for Fall/Winter 2023-2024

Accounting, Assurance & Management Accounting

- A Practical and Risk-Based Roadmap to ESG Compliance
- Advanced Budgeting Techniques
- ASPE and ASNFPO - Financial Instruments (3856)
- Audits - Group Audit Considerations (Revised CAS 600)
- Audits - Risk Assessment (Using the PEG)
- Beyond Traditional Budgeting
- Compilations - Specific Topics
- Introduction to Strategic Budgeting and Forecasting

Ethics

- Contemporary Ethics for CPAs
- How to Build an Ethical Culture
- Professional and Applied Ethics for Canadian CPAs
- Survival Skills for a New Era of Ethics and ESG

Technology & Innovation

- CPA Strategic Alignment: Align your Accounting System with your Strategic and Operating Plans

People Management & Personal Development

- Building and Fostering Trust
- CPA Skills That AI Can't Beat
- Managing a Multi-generational Workforce
- Path to Promotion: The Succession Planning Playbook
- Rethinking Impostor Syndrome™ - Understanding and Addressing Impostor Syndrome in the Workplace
- The Emotionally Strong Leader Book Club
- The Power of the Pen

Strategy, Governance & HR

- A Concise Understanding of Governance, Risk and Compliance Programs - A Critical Success Factor
- Introduction to ESG Reporting Series
- The Essentials of Project Management

NEW Negotiating Mastery Certificate Program

Don't miss this new certificate program designed for deal makers who are seeking to take their negotiation skills to the next level.

Attend only those seminars that are of interest, or complete all seven to obtain the Negotiating Mastery certificate.

- Essential Communication Skills
- Human Behaviour and Cultural Differences
- Power, Creativity, and Timing
- Tactic Recognition and Response
- Team Bargaining and Mediation
- The Framework for Negotiating Mastery
- The Negotiating Process Simplified

» **READ MORE** Learn more, save more. See page 117-118 for how you can save money by purchasing a PD Passport.

cpa PRO

Designed by the CPA profession for CPAs, these courses help you adapt to industry changes and advance your career with the latest industry content delivered in a way that works around you.

Level up with CPA PRO.

As a CPA, you work in an ever-changing environment and are continually adapting to updated standards. You need to keep learning, unlearning, and relearning in order to maintain competency, and this lifelong learning ensures that you have the knowledge, skills, and ability to serve and protect the public at the highest level.

CPABC's PD Program offers numerous learning opportunities, including courses designed specifically for CPAs by the CPA profession. These courses—now branded with the "CPA PRO" wordmark—help you adapt to industry changes and advance your career with the latest industry content delivered in a way that works for you. They cover a wide variety of business and leadership topics and provide annual updates related to standards, legislation, and regulation. For regulatory content, in particular, courses are designed to ensure members get vital updates with the right amount of depth.

Look for the CPA PRO wordmark—only courses developed by the CPA profession will carry it.

WHAT'S **NEW**	WHAT'S **BEST**	WHAT'S **RIGHT**	WHAT'S **DIFFERENT**
Rules. Regulations. Best practices. Our courses help you stay up to date.	No fluff. Just high-quality, relevant information to serve you best.	On demand. In person. Virtual. Learn the way that's right for you.	By the CPA profession for CPAs. Be supported by your professional community.

» **LOOK** for the CPA PRO wordmark and be supported by your professional community.

COMING THIS FALL: Three value-packed, in-person PD Nexus Days!

HYATT REGENCY VANCOUVER | OCT 12

Estate Planning INSIGHTS

In conjunction with the Society of Trust and Estate Practitioners Canada (STEP), Vancouver Branch, we are excited to announce the return of Estate Planning Insights, in-person this October. Join your fellow estate planning peers in a day featuring relevant and recent developments in tax and estate planning.

COAST COAL HARBOUR | NOV 23 & 24

Local Government Accounting & Auditing WORKSHOP

Are you a local government finance professional? Get ready for this forum and workshop to discuss timely issues facing local government entities. This biennial event is presented in partnership with the Government Finance Officers Association of BC (GFOABC).

VANCOUVER CONVENTON CENTRE | DEC 13

Business & Innovation INSIGHTS

Our 2023 Nexus season will close out with the popular Business and Innovation Insights. Featuring keynotes from Terry Small on preparing your mind for the future and Rosanne Horner on an economic update, this value-packed day will also offer three breakout streams to choose from.

CPABC Nexus Days

» **READ MORE** About our Fall/Winter Nexus Days offerings on page 119-122.

Fall 2023 Professional Development Series

Specially curated programming that meet's your specific interests and needs

Introduction to ESG Reporting Series

This introduction to ESG reporting will highlight its importance and how it is increasingly becoming integrated with financial reporting. Its aim is to demystify ESG reporting and provide an update on recent regulatory developments related to ESG reporting.

- Four two-hour seminars in December
- First seminar will also be available as a standalone
- Series registrants will have access to recorded sessions for a limited time

Women's Leadership Mini-Series

Any journey is best shared. Women and men both need to develop skills to be successful in their careers. However, the manner in which many women experience their career journey is different from their male counterparts. Join in for this revamped mini-series which includes:

- Four two-hour seminars from October to December
- Series registrants will have access to recorded sessions for a limited time
- For an extended program, refer to the Women in Leadership Certificate Program

Income Tax Series

The world of tax is constantly changing. This series is designed to highlight emerging tax changes as they are announced, and provide a monthly update on a current tax area of tax of importance to CPAs in both industry and public practice.

- Monthly 1.5-hour seminars from October to February
- Topics based on new and noteworthy developments
- Each session available as a standalone, but only series registrants will have access to recorded sessions
- Receive a discount when you register for the entire series

Public Practice Series

Our new Public Practice Series is designed especially for our public practitioners to update their technical knowledge and address some key changes and challeng-es in professional practice in BC today.

Connect with peers and explore new ideas with relevant sessions and practical topics.

- Monthly 1.5-hour seminars from September to January
- Each session available as a standalone, but only series registrants will have access to recorded sessions
- Receive a discount when you register for the entire series

Lifelong learning – finding the right solutions

Ready to develop your knowledge and skills to resolve obstacles or clear up pathways? Find the courses that are most relevant to your challenges.

Negotiating – getting to your desired outcome

Negotiating can't be avoided, regardless of the nature of our work or the industry we're in. "Arguably the one skill every accounting professional must master is the ability to get others to agree with them," says Dr. Jim Murray, author of *The Optimal Negotiator*. In your personal dealings, you have probably also had to negotiate with family, friends, and other businesses and came out wishing you were better at it. So here's a skill that's definitely worth enhancing. Take a deeper dive into negotiating skills by signing up for the new **Negotiating Mastery Certificate Program**, or enroll in the half-day seminar, **Negotiation Skills**.

Teamwork in leadership – building trust in a new era of work

An important component in the successful creation of a well-functioning team is trust. Where trust is lacking, valuable time is wasted on the blame-game, correcting misunderstandings, and dealing with low morale due to uneven delegation of work. An added challenge is the hybrid work model where team members are often in different spaces and connect mainly through online meetings. Discover how to **build and foster trust** in order to create a healthier work environment and decrease turnover.

Digital transformation in business – what you need to know

Digital transformation is shaping the future of accounting and the pace of digital change is faster than ever. No accountant can ignore the onslaught of AI, automation, and big data and these technologies present huge opportunities for finance teams. Explore **three ways digital transformation is reinventing accounting** and learn **how to adopt finance technology without the usual headaches and drama**. Or get an overview of how **artificial intelligence will impact accounting and finance professionals**. On the flip side, you may be interested to discover the **CPA skills that AI can't beat**.

ESG – exploring the questions to make informed decisions

ESG reporting is becoming increasingly integrated with financial reporting, and CPAs are expected to be up to date on sustainability and non-financial reporting. Get caught up or receive an introduction to ESG reporting in our new series that will cover each of the environmental, social, and governance factors. Or check out our new seminars, **A Practical and Risk-Based Roadmap to ESG Compliance** and **Survival Skills for a New Era of Ethics and ESG**.

Ethically speaking – discovering new points of view in ethics

For members looking for new points of view in professional and business ethics, we have **new titles** lined up for you. One key obstacle to establishing a unified ethical framework is often company culture. Explore strategies to overcome this barrier and cultivate an ethical culture within the organization in **How to Build an Ethical Culture**. Or for a look at recent developments in economic, social, and governance trends and how these changes may affect their role and the profession from an ethical standpoint, plan on attending **Contemporary Ethics for CPAs**.

Personal well-being – keeping your wellness within sight

Don't forget that maintaining wellness and a good life balance is essential to being a successful professional. **Time management and productivity, balanced thinking, self reflection**, and **resiliency** are all highly useful skills that often get overlooked. New titles in this category include **Rethinking Impostor Syndrome™ - Understanding and Addressing Impostor Syndrome in the Workplace**; and **The Emotionally Strong Leader Book Club**.

Hot topics in tax – keeping up to date in the world of tax

The world of tax is constantly changing, and keeping current on updates and announcements is of utmost importance. Make sure you check out our Income Tax Series of curated 1.5-hour sessions that run monthly from October to February. Or for more in-depth tax courses, browse the **many titles** we offer.

Accounting for new standards – staying aware of new requirements

For those looking to brush up on accounting standards, browse all **live** accounting and assurance seminars or their **on-demand** versions. Some new titles include **Audits - Group Audit Considerations (Revised CAS 600)**, **Audits - Risk Assessment (Using the PEG)**, and **Compilations – Specific Topics**. ■

Meet some of *your* great instructors!

KEN LEWCHUK, CPA, is also a Certified Public Accountant (Texas). He graduated with an MBA from the Edinburgh Business School and with an MA in Applied and Professional Ethics from the University of Leeds, where his dissertation focused on Enron and corporate responsibility. His career in the energy sector has spanned technical accounting, corporate finance, internal audit, and corporate compliance.

Ken will instruct Business Ethics: From Enron to Lehman Brothers, and Professional and Applied Ethics for Canadian CPAs.

TANIS FRAME, MSc, is a long-time facilitator and sought after leadership coach who helps passionate people create the impact they are called to make in the world while thriving in all aspects of their lives.

Tanis is curious about what cultivates thriving and what gets in the way. She is known for creating powerful spaces for learning, and for making growth and connection fun.

Tanis will facilitate the new seminar, The Power of the Pen. Also catch her at the Women's Leadership Series or Certificate Program.

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.

Shawn will present a number of leadership and personal development seminars this fall.

Hear from Shawn directly at one of his upcoming seminars.

ZHETING SU, BA, JD, is a partner at Thorsteinssons' Vancouver office. Her practice focuses on all aspects of transactional/commodity taxes, including GST/HST, provincial sales taxes, and realty taxes. She advises on tax implications of transactions for individuals, non-profits, charities, and businesses. Zheting also assists clients with tax planning and represents clients in audits, administrative appeals, litigation, and voluntary disclosures.

Zheting will instruct seminars on commodity tax in October, November, and January.

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

HELEN SCHNEIDERMAN is a partner at Kwela Leadership and Talent Management and has over 20 years of experience as an organizational development and human resources professional. Helen's expertise includes training and facilitation, people and leadership development, diversity, equity and inclusion, strategic planning, employee engagement, and performance management.

Hear from Helen at the seminar High Performing Team Member.

Listen to our podcast with Helen's colleague, Glen Sollors on how to reduce stress.

DORIS GOOD, CPA, CMA, is an associate with Gratitude Learning Associates. She was a controller for a large retailer, a manager at one of the big four accounting firms, and a training manager for the provincial government. During her tenure with the Ministry of Finance, she was awarded the Apex Award in Leadership for her work in professional ethics training.

Doris also earned an MBA from Royals Roads University, winning the Founders Award for Leadership and Sustainability.

Doris will present our new ethics seminar, Contemporary Ethics for CPAs with Jeff Price.

ARUN MATHUR, FCPA, FCA, is the owner and lead instructor at UltimQuest Knowledge Inc., which offers corporate training on improving governance, ethics, internal controls, fraud prevention, KPIs, and related topics.

He provides live and online training through CPA bodies across Canada and Bermuda.

Arun will instruct the seminar Ethics in Professional Practice – What Canadian CPAs Need to Know.

Check out our video on-demand titles from UltimQuest Knowledge.

ROSANNE HORNER, MBA, is the vice president, South Fraser Region at BDC. She is passionate about the development and success of Canadian entrepreneurs. With over 17 years of experience at BDC, she has helped grow companies of all sizes and in a variety of industries. Rosanne holds a BA from UBC, an MBA from the University of Hertfordshire and a Management Certificate from BCIT in Human Resources.

Connect with Rosanne at PD Nexus: Business and Innovation Insights (Dec 13) where she will present the plenary, Economic Update.

Seminar **Formats**

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

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

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

CPABC Nexus Days

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

CPABC Executive Programs

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

Seminar **Levels**

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

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

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

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

ACCOUNTING & ASSURANCE

AUDIT & ASSURANCE

Audits - Application of CAS 315 Revised Standard — Nov-24 — 8:30am-4:30pm — Live Webinar

Available Online On-demand

This course reviews the revisions to CAS 315, Identifying and Assessing the Risks of Material Misstatement. The revisions require a more robust risk identification and assessment process to promote improved responses to identified risks. This course provides participants with guidance on the practical application of some of the key revisions in the standard.

CPA PRO

Audits - Auditing Accounting Estimates (CAS 540) Revised Standard — Dec-07 — 8:30am-12pm — Live Webinar

Available Online On-demand

This course will provide an overview of Revised CAS 540 Auditing Accounting Estimates and Related Disclosures. Required risk assessment procedures, guidance on the three possible testing approaches in performing further audit procedures on accounting estimates, assessing inherent and control risk, performing stand-back procedures, incorporating professional skepticism, and meeting documentation will all be addressed. Participants will be able to identify the auditor's responsibilities and apply the standards when designing and performing procedures for audit engagements.

CPA PRO

NEW **Audits - Group Audit Considerations (Revised CAS 600)** — Nov-21 — 8:30am-12pm — Live Webinar

Available Online On-demand

This course provides an overview of the key requirements of the revised CAS 600 standard, highlights changes, and provides guidance on scalability for the less complex entity with few or no external component auditors.

CPA PRO

Audits - Review of the Standards This seminar provides a foundation in the practical application of the Canadian Auditing Standards (CAS) to audit engagements. Using a case study approach, the course reviews key CAS 540 – Accounting Estimates and Related Disclosures and examines areas identified as common pitfalls by CPA national practice inspection findings. CPA PRO	Four Segments Nov-16, Nov-17, Nov-20 & Nov-21 *Available Online On-demand*	9am-12:30pm	Live Webinar
Audits - Risk Assessment (Using the PEG) This seminar provides a practical approach to applying the requirements of CAS when performing procedures in the risk assessment phase in an audit engagement. Participants will apply the CAS requirements to a moderately complex for-profit private company using a case study that incorporates the use of the Professional Engagement Guide (PEG) forms and checklists. CPA PRO	Dec-08 *Available Online On-demand*	8:30am-4:30pm	Live Webinar
Audits - Risk Related to Fraud (CAS 240) The requirements of CAS 240 are designed to assist the auditor in identifying and assessing the risk of material misstatement due to fraud and in designing procedures to detect and respond to such misstatements. Through the use of discussion, case studies, and examples, participants will be able to identify the auditor's responsibilities relate to fraud and apply the standards when designing and performing procedures for audit engagements. CPA PRO	Nov-09 *Available Online On-demand*	8:30am-12pm	Live Webinar

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ETHICS
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Financial Modelling
PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT
Communication & Negotiation
Creative Thinking & Decision Making
Self-Management & Wellness
Teamwork & Leadership
PUBLIC PRACTICE MANAGEMENT
STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE
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TAXATION
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Corporate & Personal Tax
Not-For-Profit Organizations
Trusts & Estates
US & International Taxation
TECHNOLOGY & INNOVATION
Business Transformation & Emerging Issues
Software & Tools
WEALTH MANAGEMENT
PD NEXUS DAYS

Audits - Simple Entity

It can be challenging to understand how to apply certain Canadian Auditing Standards (CAS) to a simple entity in an efficient and effective manner. This seminar will help auditors to better understand and apply CAS requirements in this context. Key concepts of CAS and their application will be reviewed, taking into consideration unique characteristics of a simple entity.

CPA PRO

Nov-17	8:30am-4:30pm	Live Webinar

Available Online On-demand

Audits - Update 2023

This seminar reviews recent revisions to the CPA Canada Handbook – Assurance and other practice matters that have occurred over the last year. In addition to comparing new and revised assurance and other related service standards, this seminar provides an overview of projects in progress and other developments of interest to practitioners, including national issues that have been identified by practice advisory and/or practice inspection.

CPA PRO

Oct-20	9am-12:30pm	**In-Person, Vancouver**
Oct-23	9am-12:30pm	Live Webinar
Nov-27	9am-12:30pm	Live Webinar
Dec-11	9am-12:30pm	Live Webinar

Available Online On-demand

Compilations - Application of CSRS 4200

This course will update practitioners on the standards for compilation engagements (CSRS 4200) to allow them to have a working knowledge of the standard for application in their practices. This seminar will include hands-on opportunities to review application of the standard in different scenarios and comparison to the previous standard to other non-assurance standards.

CPA PRO

Nov-14	9am-12:30pm	**In-Person, Vancouver**
Dec-14	9am-12:30pm	Live Webinar
Jan-25	9am-12:30pm	Live Webinar

Available Online On-demand

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Compilations - Specific Topics This course will review the areas of CSRS 4200 where practitioners are facing challenges in applying the standard. Practical examples will be used to illustrate areas where practitioners are having difficulty implementing the new standards from the scope of the standard, to engagement acceptance/continuance, performance of the engagement, and reporting. CPA PRO	Nov-23	9am-12:30pm	**In-Person, Vancouver**
	Nov-30	9am-12:30pm	Live Webinar
	Feb-09	9am-12:30pm	Live Webinar
	Available Online On-demand		
Other Engagements – Agreed-upon Procedures (CSRS 4400) This course provides an overview of the requirements of the new Canadian Standard for Related Services (CSRS) 4400, and its impact on the planning, implementation, and documentation of an Agreed-Upon Procedures engagement. Participants will be able to identify what is covered in the standard such as the use of professional judgment in an agreed-upon procedures engagement, using the work of a practitioner's expert, and undertaking an agreed-upon procedures engagement together with another engagement. CPA PRO	*Available Online On-demand Only*	2 hours	On-demand
Other Engagements – Non-assurance An overview of the CPA Canada Other Canadian Standards for Related Services Engagements (non-assurance standards). This course will provide an understanding of what types of engagements are covered by each standard, an outline of the work to be done under each from client acceptance to reporting, and compare between the standards to clearly show when each would or would not be applicable. CPA PRO	*Available Online On-demand Only*	2 hours	On-demand

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

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PD Nexus: Local Government Accounting & Auditing Workshop Are you a local government finance professional? Get ready for a forum and workshop to discuss timely issues facing local government entities. The Local Government Accounting and Auditing Workshop is a biennial event presented in partnership with the Government Finance Officers Association of BC (GFOABC).	Nov-23 & Nov-24	8:30am-4:30pm 8:30am-2:30pm	**Coast Coal Harbour, Vancouver**
Quality Management - Application for Assurance Providers The Canadian Standards for Quality Control (CSQC1) have been replaced by the Canadian Standard for Quality Management (CSQM1 and CSQM2) and related amendments to relevant assurance standards. This session will provide participants with a brief overview of the new requirement along with examples of common quality control objectives, risks and responses for small to mid-size firms, and the opportunity to tailor these to their firm's specific circumstances. cpa PRO	Nov-17 *Available Online On-demand*	9am-12:30pm	Live Webinar
Quality Management - Overview for Assurance Providers This course reviews the requirements of the new Canadian Standard for Quality Management (CSQM1 and CSQM2) and related amendments to Canadian Auditing Standards (CAS 220) and its impact on the quality control processes for assurance practitioners. The course provides a map of the decisions that will need to be made and the changes, if any, required to ensure current quality control processes and procedures are compliant with the new standards. cpa PRO	Nov-03 *Available Online On-demand*	9am-12:30pm	Live Webinar

Course	Date	Time	Format
Quality Management - Overview for Non-Assurance Providers This course provides participants with an overview of the requirements of the newly issued Canadian Standard for Quality Management (CSQM1 and CSQM2) and its impact on the quality control processes for non-assurance practitioners. The course provides a map of the decisions that will need to be made and the changes, if any, required to ensure current quality control processes and procedures are compliant with the new standards. CPA PRO	Nov-24	9am-12:30pm	Live Webinar
	Available Online On-demand		
Quality Management - Workshop for Non-Assurance Providers This course will assist firms that practice exclusively in the non-assurance area to understand, apply, and document its System of Quality Management (SOQM) in accordance with the new standard CSQM 1. Participants will identify quality objectives, risks, and responses for a few of the quality objective components during the workshop, by completing various workshop-developed forms that have been, in some instances, adapted from the Quality Management Guide (QMG). CPA PRO	Nov-29	9am-12:30pm	Live Webinar
	Available Online On-demand		
Reviews - Application of the Standard (CSRE 2400) This session uses extracts of a review engagement file as a fictitious entity, which is aimed at an experienced clientele, allowing participants to deepen their knowledge of the CSRE 2400 requirements. The session will also provide participants practical advice to allow proper application. CPA PRO	Nov-06	9am-5pm	**In-Person, Vancouver**
	Dec-18	9am-5pm	Live Webinar
	Two Segments Feb-21 & Feb-22	9am-12:30pm	Live Webinar
	Available Online On-demand		

ACCOUNTING & ASSURANCE
Audit & Assurance
Financial Reporting
Management Accounting
ETHICS
FINANCE & ECONOMICS
Business Valuations
Corporate Finance
Financial Modelling
PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT
Communication & Negotiation
Creative Thinking & Decision Making
Self-Management & Wellness
Teamwork & Leadership
PUBLIC PRACTICE MANAGEMENT
STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE
Risk Management & Fraud
Strategy, Governance & Human Resource
TAXATION
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Reviews - Overview of the Standard (CSRE 2400) From planning to issuing the practitioner's report, each stage of the review engagement is considered in this course. The current standard, CSRE 2400, is covered and practical tools are used to illustrate examples of documentation, including insight into the updated Canadian Professional Engagement Manual for review engagements. CPA PRO	*Available Online On-demand Only*	1.5 hours	On-demand
Reviews - Specific Topics This course builds upon fundamental knowledge of the CSRE 2400 – Review Engagements Standards and addresses areas that commonly prove more challenging for practitioners. Participants will gain a deeper understanding of how to quickly identify incomplete review engagement documentation and apply the necessary changes to resolve outstanding issues. CPA PRO	Dec-12 *Available Online On-demand*	9am-5pm	**In-Person, Vancouver**

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

Seminar Schedule
PD Passports
Nexus Days
Executive Programs
Certificate Programs

FINANCIAL REPORTING

ASNFPO - Disclosure and Presentation

Two Segments Nov-07 & Nov-08 | 9am-12:30pm | Live Webinar

Available Online On-demand

This seminar will serve as a review and refresher of the disclosure and presentation requirements of Accounting Standards for Not-for-Profit Organizations (ASNFPO) as well as the most common Accounting Standards for Private Enterprises (ASPE) applicable to not-for-profit organizations. Participants will learn the options available when setting accounting policies and the impacts on disclosure.

CPA PRO

ASNFPO - Review of the Standards

Two Segments Dec-11 & Dec-12 | 9am-12:30pm | Live Webinar

Available Online On-demand

This seminar discusses the application of NFPO accounting standards, with an emphasis on areas where choice exists in Part III – Accounting Standards for Not-for-Profit Organizations (ASNFPO) and relevant sections of Part II – Accounting Standards for Private Enterprises (ASPE). Participants will learn the options available when selecting policies and their impacts on disclosure, and how to determine the appropriate accounting treatment given different facts and scenarios.

CPA PRO

ASNFPO - Update 2023

Nov-06	9am-12:30pm	Live Webinar
Jan-30	9am-12:30pm	Live Webinar

Available Online On-demand

This seminar will provide an information update on recent revisions to the CPA Canada Handbook – Part III, Accounting Standards for Not-for-Profit Organizations (ASNFPO). In addition, revisions will be discussed to Part II, Accounting Standards for Private Enterprises (ASPE) where they are applicable to NFPOs. Participants will be able to utilize this information on proposed changes to the standards to provide guidance to NFPOs and board members.

CPA PRO

Seminar	Date	Time	Format
ASPE - Disclosure and Presentation This seminar reviews the realities and best practices for disclosure and presentation requirements of Part II – Accounting Standards for Private Enterprises (ASPE). Each disclosure and presentation requirement of ASPE will be reviewed and examples will be provided. cpa PRO	Nov-20	8:30am-4:30pm	Live Webinar
	Two Segments Dec-14 & Dec-15	9am-12:30pm	Live Webinar
	Available Online On-demand		
ASPE - Real Estate Industry Real estate entities have unique financial reporting issues under Accounting Standards for Private Enterprises (ASPE). This seminar reviews ASPE standards relevant to developers and those with income-producing properties using industry guidance available from the Real Property Association of Canada (REALPAC). cpa PRO	Two Segments Oct-26 & Oct-27	9am-12:30pm	Live Webinar
	Feb-27 & Feb-28	9am-12:30pm	Live Webinar
	Available Online On-demand		
ASPE - Related Party Transactions Applying Accounting Standards for Private Enterprises (ASPE) for related party transactions is complicated and is an area regularly cited for deficiencies by practice inspection. Using case studies, exercises, and examples, this course addresses 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. cpa PRO	Two Segments Nov-06 & Nov-07	9am-12:30pm	Live Webinar
	Mar-06 & Mar-07	9am-12:30pm	Live Webinar
	Available Online On-demand		

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

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

ETHICS

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

PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT
- Communication & Negotiation
- Creative Thinking & Decision Making
- Self-Management & Wellness
- Teamwork & Leadership

PUBLIC PRACTICE MANAGEMENT

STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE
- Risk Management & Fraud
- Strategy, Governance & Human Resource

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

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

WEALTH MANAGEMENT

PD NEXUS DAYS

ASPE - Revenue Recognition 3400

Two Segments
Dec-04 & Dec-05 | 9am-12:30pm | Live Webinar

Available Online On-demand

This course addresses challenges faced by preparers of ASPE financial statements and practitioners with respect to the recognition, measurement, presentation, and disclosure of revenue transactions as a result of recent revisions to ASPE 3400. This course offers a comprehensive review of the principles of revenue recognition under ASPE with illustrations and examples on common revenue arrangements including sale of goods vs. services in a variety of industries.

CPA PRO

ASPE - Review of the Standards

Two Segments
Nov-27 & Nov-29 | 8:30am-4:30pm | Live Webinar

Available Online On-demand

This two-day seminar reviews the standards in commonly used sections of Part II – Accounting Standards for Private Enterprises (ASPE), and discusses other aspects of the standards. In addition, this seminar identifies and outlines the accounting policy choices available to management for applying ASPE.

CPA PRO

ASPE – Statement of Cash Flows

Available Online On-demand Only | 2 hours | On-demand

This seminar provides participants with an overview of the preparation of the statement of cash flow, including discussion of the standard and exercises involving the preparation of a statement of cash flow under the direct and indirect method. This seminar covers basic cash flow statements and additional complexities, including non-cash transactions, foreign exchange, definition of cash and cash equivalents, and determination of adjustments to operating activities.

CPA PRO

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ASPE – Stock-based Compensation This seminar focuses on the areas of financial reporting of stock-based compensation that are widely experienced in private enterprises. The seminar starts with a discussion on how to determine and account for stock-based compensation, based on illustrative examples and a comprehensive exercise. Participants will better understand the requirements of the ASPE standards through discussion, exercises that introduce complexities, and a comprehensive exercise to illustrate the concepts discussed. cpa PRO	*Available Online On-demand Only*	2 hours	On-demand
ASPE - Update 2023 This seminar reviews recent revisions to Part II – Accounting Standards for Private Enterprises (ASPE) for participants who want to keep up with accounting standard changes and projects. In addition to an overview of the changes, specific examples detailing implementation will be provided and awareness of potential future changes in the standards will be included. cpa PRO	Oct-20	8:30am-12pm	Live Webinar
	Oct-30	9am-12:30pm	**In-Person, Vancouver**
	Nov-15	8:30am-12pm	Live Webinar
	Dec-11	8:30am-12pm	Live Webinar
	Dec-18	9am-12:30pm	Live Webinar
	Jan-30	9am-12:30pm	Live Webinar
	Available Online On-demand		
ASPE and ASNFPO - Financial Instruments (3856) This seminar provides an in-depth review of Section 3856, Financial Instruments for both private enterprises and not-for-profit organizations. Participants will have the opportunity to review illustrative examples and exercises to help address application issues and identify current issues related to financial instruments from the Private Enterprise Advisory Committee and the Not-for-Profit Advisory Committee. cpa PRO	Two Segments Oct-31 & Nov-01	9am-12:30pm	Live Webinar
	Available Online On-demand		

IFRS - Disclosure and Presentation

This seminar provides a review of Part I – International Financial Reporting Standards (IFRS) pertaining to the disclosure and financial statement presentation standards. The work of standards setters to streamline presentation and disclosure and the use of non-GAAP disclosures will be highlighted. The seminar covers areas of disclosure that users and security commissions have found deficient and provides insight to assist participants in writing clear, concise disclosure notes and preparing financial statements that are consistent with IFRS requirements.

CPA PRO

Three Segments
Oct-24, Oct-25 & Oct-26 | 9am-12:30pm | Live Webinar

Available Online On-demand

IFRS - Essentials

This seminar provides participants who want to know about IFRS, but do not have to implement the standards and understand the technical details, with an understanding of the essentials of Part I - International Financial Reporting Standards (IFRS). The course delivers an examination on the types of entities using IFRS, impact on development of ASPE, key concepts, conceptual frameworks, descriptions of IFRS terminology, and basics of IFRS financial statements.

CPA PRO

Oct-23 | 9am-12:30pm | Live Webinar

Available Online On-demand

IFRS - Financial Instruments

This course reviews the main provisions of the Part I – International Financial Reporting Standards 9, Financial Instruments and provide participants with the necessary knowledge to apply it to their own financial instrument fact situation.

CPA PRO

Two Segments
Nov-22 & Nov 23 | 8:30am-12:30pm | Live Webinar

Available Online On-demand

IFRS - Review of the Standards

The objective of this seminar is to provide participants with a solid introduction to Part I – International Financial Reporting Standards (IFRS). The focus will be on the IFRS standards that apply to most profit-oriented entities.

CPA PRO

Four Segments Nov-20, Nov-21, Nov-22 & Nov-23	9am-12:30pm	Live Webinar

Available Online On-demand

IFRS - Update 2023

This seminar provides participants with a review of new and revised IFRS between July 2022 and June 2023 and an up-to-date snapshot of other projects being considered by the IASB. Topics addressed by the IFRS Discussion Group and the IFRS Interpretations Committee during the year will be identified with in-depth coverage of specific items.

CPA PRO

Oct-23	8:30am-12pm	Live Webinar
Nov-09	9am-12:30pm	**In-Person, Vancouver**
Nov-29	9am-12:30pm	Live Webinar
Jan-25	9am-12:30pm	Live Webinar

Available Online On-demand

IFRS 15 - Revenue Recognition

Accurate revenue recognition reporting is necessary for internal and external reporting for all revenue producing companies to maintain investor and creditor confidence. The objective of this seminar is to provide participants with a practical understanding of the five-step revenue recognition framework under Part I – International Financial Reporting Standards 15, Revenue from Contracts with Customers, and how to apply it.

CPA PRO

Two Segments Dec-07 & Dec-08	8:30am-12:30pm	Live Webinar

Available Online On-demand

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WEALTH MANAGEMENT

PD NEXUS DAYS

IFRS 16 - Leases

IFRS 16 – Leases is now in effect and has significant impact for all companies with leases, particularly operating leases. This seminar provides an in-depth review of the new standard, including the objective and scope of the standard, defined terms, exemptions, and transitional requirements.

CPA PRO

Two Segments
Nov-27 & Nov-28 | 9am-12:30pm | Live Webinar

Available Online On-demand

PSAS - Review of the Standards

This session provides participants with an introduction to PSAS focusing on general concepts, the structure of the PSAS Handbook, and differences between PSAS and those of ASPE or IFRS. The session uses collaborative learning, industry examples, small case studies, and comparison of PSAS concepts with those in ASPE or IFRS to link relevant concepts to enhance participants' knowledge.

CPA PRO

Two Segments
Nov-27 & Nov-28 | 9am-12:30pm | Live Webinar

Available Online On-demand

PSAS - Specific Topics

This session examines the application of complex areas in the PSAS, starting with an overview of the more recent standards and changes to come, including Asset Retirement Obligations. The session explores common areas of complexity that appear frequently in practice that raise discussions between finance professionals and auditors using mini-case studies, shorter collaborative discussion exercises, and real-world examples.

CPA PRO

Two Segments
Dec-11 & Dec-12 | 9am-12:30pm | Live Webinar

Available Online On-demand

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PSAS - Update 2023 This seminar provides a review of sections in the PSA Handbook that have recently undergone addition, including pending sections, along with ongoing key projects and activities of the PSA Board. Background information and examples will be provided to allow participants to better position themselves to plan for the changes and to advise others. CPA PRO	Nov-09 *Available Online On-demand*	9am-12:30pm	Live Webinar

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

MANAGEMENT ACCOUNTING

NEW **A Practical and Risk-Based Roadmap to ESG Compliance** This course will discuss how ESG (environmental, social, and governance) and GRC (governance, risk, and compliance) are related concepts but have distinct focuses and scopes.	Two Segments Feb-08 & Feb-09	9am-12:30pm	Live Webinar
Accelerate & Optimize Financial Close & Spreadsheet Controls Gain a practical understanding of best practices in financial close processes and learn how to accelerate the financial close process and controls. You will focus on spreadsheet controls, which make the whole process of using spreadsheets more effective and efficient. You will also learn how to redesign and enhance spreadsheets to reduce the likelihood of error and facilitate the use of spreadsheets as analytical tools.	Two Segments Nov-20 & Nov-21	9am-12:30pm	Live Webinar
NEW **Advanced Budgeting Techniques** This dynamic course will provide you with the knowledge and skills necessary to elevate your budgeting practices to a new level of effectiveness and strategic alignment. Explore advanced methodologies and innovative approaches so that you will be more effective in your budgeting role.	Two Segments Dec-11 & Dec-12 Mar-19 & Mar-20	8:30am-12pm 8:30am-12pm	Live Webinar Live Webinar
Advanced Financial Statement Analysis Enhance your analyzing skills for financial statements with this full-day course. Discover essential techniques to compare International Financial Reporting Standards (IFRS) and Accounting Standards for Private Enterprises (ASPE) reporting documents and highlight measures that must be taken into account to arrive at a detailed assessment.	Nov-08 Nov-21	9am-5pm 9am-5pm	Live Webinar **In-Person, Vancouver**

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

NEW Beyond Traditional Budgeting

This workshop is based on the principles of "Beyond Budgeting" – the innovative management approach that offers significant value to organizations by revolutionizing traditional budgeting practices and fostering a more agile and adaptive environment.

Two Segments

Nov-07 & Nov-08	8:30am-12pm	Live Webinar
Mar-11 & Mar-12	8:30am-12pm	Live Webinar

Building Enterprise Performance Dashboards

The multi-dimensional view of enterprises with both leading and lagging key performance indices (KPIs) has led many leading organizations to design holistic performance measurement and management frameworks to run their business. These frameworks are often referred to as "balanced scorecards." Through real examples and hands-on work, you will understand how these scorecards can improve performance and help your company exceed expectations.

Two Segments

Nov-23 & Nov-24	9am-12:30pm	Live Webinar

Controllership - Operational Management

In order to add value to their organizations, controllers serve distinct roles and this seminar focuses on two: steward and operator. In the operator role, the controller plays a part in human resource management as well as performing their steward role through financial performance and performance measurement, information/risk management, and relationship management skills. Participants will gain insights, skills, practical tips, and a broader view of the controller's role to add value to their organization.

CPA PRO

Two Segments

Oct-25 & Oct-26	1pm-4:30pm	Live Webinar
Mar-06 & Mar-07	12:30pm-4pm	Live Webinar

Available Online On-demand

Seminar Schedule | PD Passports | Nexus Days | Executive Programs | Certificate Programs

Controllership - Strategic Leadership

This seminar clarifies the controllers' responsibilities and provides an in-depth examination of the catalyst and strategist roles. This session provides strategies for working with people of all ages and on the importance of emotional intelligence. Participants will be able to identify ways in which they can add value as strategic leaders in their organization and can incorporate practical tips to enhance their leadership skills into their role.

CPA PRO

Two Segments Nov-08 & Nov-09	8:30am-12pm	Live Webinar
Mar-20 & Mar-21	12:30pm-4pm	Live Webinar

Available Online On-demand

Costing and Profitability

Learn how to contribute directly to your organization's bottom line by analyzing profitability by product, customer, segment, or geographical region. You will also learn how to identify the main drivers of profitability and the parts of the business that need to be changed.

Date	Time	Format
Nov-15	9am-5pm	Live Webinar

Internal Controls Refresher for Financial Managers

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 controls through videos, case studies, and discussion. Content includes what business life would be like without controls, the COSO Internal Control Framework, and case studies of controls gone wrong. Leave with a deeper understanding of internal controls and innovative approaches to internal controls.

Date	Time	Format
Nov-28	9am-5pm	Live Webinar

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Internal Controls - Business Process Improvements This seminar will provide an overview of the main concepts of internal control and its components, focusing on the COSO framework. It will outline common internal control deficiencies in a small to medium sized company and look at potential solutions through examples and discussions. Participants will identify key controls to address some of the main risks as well as the importance of addressing segregation of duties. CPA PRO	Nov-23 *Available Online On-demand*	8:30am-4:30pm	Live Webinar
Internal Controls - Implementation for SMEs Leadership and expectations of the finance function are evolving rapidly, resulting in diverse definitions of good governance, management responsibility, and appropriate internal controls. This hands-on seminar will give new and experienced financial leaders an opportunity to explore and discuss implementation of internal controls in the SME context, using the COSO Enterprise Risk Management Methodology. CPA PRO	Nov-30 *Available Online On-demand*	8:30am-4:30pm	Live Webinar
NEW **Introduction to Strategic Budgeting and Forecasting** Supercharge your financial management skills with this interactive workshop. Discover the secrets to creating effective budgets and variance reporting frameworks that drive success. Learn to analyze revenue and cost drivers, improve forecasting accuracy, and track performance with powerful variance reporting. Elevate your organization's financial decision-making and build a robust budgeting process.	Two Segments Oct-30 & Oct-31 Feb-12 & Feb-13	 8:30am-12pm 8:30am-12pm	 Live Webinar Live Webinar

Seminar Schedule | PD Passports | Nexus Days | Executive Programs | Certificate Programs

NEW **LEAN for Finance Manager** Sophisticated ERP software is often implemented without a solid understanding and documentation of the organization's value chain and the processes that underlie the organization's activities. This hands-on seminar will give both new and experienced financial leaders an opportunity to discover and discuss the implementation of LEAN concepts and tools.	Nov-16	8:30am-4:30pm	Live Webinar
Powerful Financial Analysis Acquire key skills that financial analysts need to perform their role effectively within an accounting department. Obtain tools that will assist analysts in furthering their careers, including the abilities to provide meaningful information and influence those around them.	Nov-20 Feb-21	9am-5pm 9am-5pm	**In-Person, Vancouver** Live Webinar
Practical Tips for Controllers and CFOs Discover a wide range of useful tips that you can employ at work – tips that are not normally found in seminars or textbooks, illustrated with interesting anecdotes and examples.	Oct-25 Dec-08	9am-5pm 9am-5pm	Live Webinar Live Webinar
Taking Financial Statement and Ratio Analysis to the Next Level Explore analyzing financial statements using a few different methods, focusing on ratio analysis and comparisons to industry standards sourced from various software tools such as Bloomberg. Identify what to look for on financial statements, and discuss other indicators of health for an organization.	Nov-22 Feb-22	9am-5pm 9am-5pm	**In-Person, Vancouver** Live Webinar

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

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ETHICS

A Threats and Safeguards Approach to Ethical Decision Making Explore situations in your professional roles that involve ethical challenges and examine how these can pose threats to compliance with the Fundamental Principles. Determine how these threats can be mitigated, through examining the CPA Code and relevant safeguards.	Sep-19	8:30am-12:30pm	Live Webinar
	Sep-27	8:30am-12:30pm	Live Webinar
	Oct-07	8:30am-12:30pm	Live Webinar
	Oct-13	8:30am-12:30pm	Live Webinar
	Nov-27	1pm-5pm	Live Webinar
	Dec-04	1pm-5pm	Live Webinar
	Dec-09	8:30am-12:30pm	Live Webinar
	Dec-15	1pm-5pm	Live Webinar
	Jan-29	8:30am-12:30pm	Live Webinar
Business Ethics: From Enron to Lehman Brothers Explore personal and cultural factors which influence ethical behavior through the lens of two iconic business ethics case studies: the 2001 collapse of Enron Corporation and the 2008 bankruptcy of Lehman Brothers. In comparing the two cases, research from moral psychology and the role accountants played will be discussed.	Oct-19	8:30am-12:30pm	Live Webinar
	Feb-15	8:30am-12:30pm	Live Webinar
Business Ethics: It Starts with You Understand and manage ethical issues in your everyday business setting. Explore how both personal and business values influence business decisions through dynamic group discussions.	Oct-18	8:30am-12:30pm	Live Webinar
	Nov-08	8:30am-12:30pm	**In-Person, Vancouver**
	Nov-28	8:30am-12:30pm	Live Webinar
	Dec-19	1pm-5pm	Live Webinar
	Dec-19	8:30am-12:30pm	Live Webinar
	Mar-05	8:30am-12:30pm	Live Webinar

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Contemporary Ethics for CPAs Integrity is the overarching principle of the CPA Code of Professional Conduct and goes beyond adherence to the rules. This seminar helps participants understand recent industrial developments in economic, social, and governance trends. Government resources, reports, statistics, and case studies will be used to help navigate participants to a general understanding of relevant current trends, and how they may affect the accounting profession and their work as CPAs. CPA PRO	Nov-25 Dec-18 Mar-21 *Available Online On-demand*	8:30am-12:30pm 8:30am-12:30pm 8:30am-12:30pm	Live Webinar Live Webinar Live Webinar
Ethical Decision Making: Exploring the Hidden Influence of Unconscious Bias in the Conscious Mind How can we better understand the hidden biases that underlie our decisions, shape our perspectives, and influence our personal interactions? In this session we will consider the drivers of unconscious bias and the impact on organizational decision making. We will explore how best to identify and mitigate the risks of unconscious bias in the workplace, to build more innovative, inclusive, and ultimately successful organizations.	Nov-14 Dec-06	8:30am-12:30pm 8:30am-12:30pm	**In-Person, Vancouver** Live Webinar
Ethical Dilemmas Our expectations of how organizations should behave are no longer based purely on shareholder value or service, but include an array of social, environmental, and governance issues. In order to resolve ethical dilemmas, it is necessary to both understand the issues at hand, and have a rigorous analytical and critical thinking framework with which to examine these from an ethical perspective. This seminar will provide you with the skills to do both.	Dec-06	8:30am-12:30pm	Live Webinar

Ethical Leadership in an Age of AI	Oct-25	8:30am-12:30pm	Live Webinar
CPAs have a leadership role to play in this era of disruptive technology. Advancements in artificial intelligence create strategic opportunities for organizations and raise unique ethics challenges for business leaders. Explore recent advancements in AI and how they can be expected to change CPA roles.	Nov-29	1pm-5pm	Live Webinar
» **READ** instructor Laura Friedrich's article on CPAs and AI.			
Ethical Reasoning in a World of Differing Perspectives	Jan-24	8:30am-12:30pm	Live Webinar
Our lens is incredibly powerful, but often it leads to strongly biased perspectives due to its unique nature. This session will leverage neuroscience findings as we seek to understand the impact of our conscious and unconscious mind on the decisions we make every day. Please note that this is designed as a workshop and will be highly integrative with many resources used through the session.			
Ethics and Technology	Nov-01	8:30am-12:30pm	Live Webinar
Uncover ethical considerations and outcomes related to technology. Explore "technoethics" and the implications it has for individuals and organizations, pertaining to issues such as copyrights, cybercrimes, and geo-tracking technologies.	Feb-06	8:30am-12:30pm	Live Webinar

NEW **Ethics and the Changing Role of Corporations in Society** With the spotlight on topics such as sustainability, diversity and inclusion, employee engagement, and corporate social responsibility, organizations are now forced to respond and operate differently than in the past. Gain an in-depth understanding of why ethical practices are fundamental to the success and longevity of any organization today – no matter the industry, type, or size. Discover how individual employees, teams, and corporations can navigate complex and challenging situations using an ethical mindset.	Sep-26	8:30am-12:30pm	**In-Person, Vancouver**
Ethics at Our Core Refresh your knowledge of the CPA Code of Professional Conduct and apply the Code to resolve several interactive case studies and realistic situations. This seminar helps participants to develop skills for dealing with ethical dilemmas and using appropriate decision making in their workplaces. cpa PRO	Nov-07 Dec-16 *Available Online On-demand*	8:30am-12:30pm 8:30am-12:30pm	Live Webinar Live Webinar
Ethics in Professional Practice – What Canadian CPAs Need to Know In order for a professional practice to grow and succeed, you must be proactive about ethics. Learn to deal with actual ethical dilemmas they face, regardless of the size of your practice or the role you play within the practice. Explore a step-by-step approach that will help you navigate through complex and sensitive issues that arise in any practice.	Nov-20 Dec-05	8:30am-12:30pm 8:30am-12:30pm	Live Webinar Live Webinar

NEW How to Build an Ethical Culture

Nov-28	1pm-5pm	**In-Person, Victoria**
Feb-08	1pm-5pm	Live Webinar

In every organization, fostering an ethical environment is crucial, and individuals generally strive to uphold proper conduct. This course centers around addressing a key obstacle to establishing a unified ethical framework: company culture. It explores strategies to overcome this barrier and cultivate an ethical culture within the organization. Learn techniques to evaluate your organization's ethical performance by utilizing the sample tools provided.

Personal and Corporate Reputation in the Era of "Shares" and "Likes"

Nov-14	8:30am-12:30pm	Live Webinar
Nov-16	8:30am-12:30pm	**In-Person, Vancouver**
Feb-20	8:30am-12:30pm	Live Webinar

All it takes is one look at our morning news feed to see how personal and corporate reputations can be lost in an instant. The reality is that in this new era of iPhones and social media, well-meaning people can fall quickly in ways that leave personal and professional scars for years to come. Learn how key concepts from behavioural ethics can help us strengthen and protect both our personal reputations and those of our organizations.

» **READ** instructor Morgan Hamel's article on ethics and ESG.

NEW Professional and Applied Ethics for Canadian CPAs

Oct-24	8:30am-12:30pm	Live Webinar
Feb-27	8:30am-12:30pm	Live Webinar

This course focuses on developing awareness of the ethical dimensions and questions embedded in some situations faced by accountants in our current business context. Questions around whistleblowing, corporate culture influences in ethical decisions, and corporate social responsibility and environment, social and governance (ESG) reporting will be answered. Additionally, iconic ethics case studies and examples will be presented and discussed.

CPA PRO

Professional Ethics for Career and Life Success Receive guidance through several classic ethical frameworks, and practical tools to maintain high standards of ethics in your work and on your team. Learn how you can ensure you are working ethically even when you are charting new territory, especially amidst constant change.	Oct-27 Dec-12 Feb-22	8:30am-12:30pm 1pm-5pm 8:30am-12:30pm	Live Webinar Live Webinar Live Webinar
NEW **Survival Skills for a New Era of Ethics and ESG** We have entered a new and morally polarized era of ethics and ESG (environmental, social, and governance) – one in which the "old" way of managing business ethics, corporate reputation, whistleblowing and ESG is insufficient. Explore the concept of ESG 3.0 – a version of ESG characterized by moral humility as it relates to "taking a stand," respect for pluralist stakeholder viewpoints, an emphasis on focused ESG commitments, and a firm commitment to integrity in ESG communication.	Oct-04 Nov-16 Feb-07	8:30am-12:30pm 1pm-5pm 8:30am-12:30pm	Live Webinar **In-Person, Vancouver** Live Webinar
Understanding and Embracing Ethics in the Workplace Learn effective techniques for ethical thinking and how to apply these tools to relevant business-based scenarios.	Oct-24 Dec-13 Mar-13	8:30am-12:30pm 8:30am-12:30pm 8:30am-12:30pm	**In-Person, Vancouver** Live Webinar **In-Person, Vancouver**
NEW **Why Good Accountants Do Bad Audits** This session will propose that the root cause of many audit deficiencies reflect ethical rather than technical issues. The "three C's" (Conflicts of interest, competition, consulting) will be discussed using current case studies, with consideration on what changes might improve professional ethics in the future. **Note:** This seminar is included in the Public Practice Series	Dec-06	9am-10:30am	Live Webinar

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

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Seminar Schedule PD Passports Nexus Days Executive Programs Certificate Programs

FINANCE & ECONOMICS

BUSINESS VALUATIONS

Business Valuations - Advanced

Nov-07 | 9am-5pm | Live Webinar

Available Online On-demand

Building on the concepts taught in Business Valuations - Fundamentals, this seminar offers participants more detailed insight into some of the more complex issues associated with business valuations using a detailed case study. This seminar dissects the basic approaches, so that practitioners can recognize the limitations of various valuation approaches, and provides information that will allow professionals to conduct supplementary analysis for a more robust conclusion of value.

CPA PRO

Business Valuations - Fundamentals

Oct-24	9am-5pm	**In-Person, Vancouver**
Dec-15	9am-5pm	Live Webinar
Mar-27	9am-5pm	Live Webinar

Available Online On-demand

Accountants often need basic business valuation knowledge and skills to assist their clients or employers. This seminar provides participants with practical insight into business valuation and participants gain insight on how to apply various valuation tools, and the valuation process under an asset approach, income approach, and market approach.

CPA PRO

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PD NEXUS DAYS

Business Valuations – Purchase Price Allocation This seminar presents practical strategies for approaching a purchase price allocation (PPA) for financial reporting purposes following a business acquisition or combination. The seminar provides a summary of valuation techniques used for specific, identifiable intangible assets and provides a step-by-step review of sample calculations for valuing different types of intangible assets resulting from a business purchase. CPA PRO	Nov-21 *Available Online On-demand*	9am-5pm	Live Webinar

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

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CORPORATE FINANCE

Cash and Treasury Management This seminar reviews contemporary issues in cash and treasury management including improving cash forecasts, optimizing cash flows, financial risk management, and measuring value-at-risk. Explore state-of-the-art changes in the world of cash and treasury management, exchange ideas with peers, and leave with fresh insights to improve cash management.	Nov-30	9am-5pm	Live Webinar
Corporate Treasury Management Treasury is a key finance function that ensures businesses have the money they need to manage their day-to-day business obligations, while also helping develop their long-term financial strategies and policies. In this seminar for treasury professionals and financial managers, participants will work through detailed calculations, case studies, and examples to gain an understanding of the treasury function and how to apply its fundamental principles within the finance department of their organizations. CPA PRO	Feb-26 *Available Online On-demand*	9am-5pm	Live Webinar
Due Diligence for Acquisitions The due diligence process has multiple objectives: deciding whether to proceed, providing a basis for pricing the transaction, and preparing for life after the deal is consummated. In this seminar, participants will deepen their understanding of factors to consider, plan for, and watch for in mergers and acquisition transactions. CPA PRO	Dec-07 Two Segments Jan-23 & Jan-24 *Available Online On-demand*	9am-5pm 9am-12:30pm	Live Webinar Live Webinar

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Financing Strategies Many businesses require some type of financing and this seminar provides an in-depth review of the various forms of financing to fund capital projects or acquisitions and to reorganize existing capital structures. Participants will gain a deeper understanding of what capital providers are seeking, issues that can arise, and how companies should prepare themselves to execute a financing transaction to facilitate the seeking of financing and negotiating with capital providers. CPA PRO	Two Segments Dec-05 & Dec-06 *Available Online On-demand*	9am-12:30pm	Live Webinar
Treasury and Finance for Accountants Although accountants are not specifically trained in the inner workings of hedging and financial instruments, they are often called upon for advice in these areas, particularly to hedge various risks. This course reviews the business side of finance, hedging, and treasury transactions and provides accountants with a solid understanding of some of the key financial principles to obtain a better understanding of the business aspects.	Nov-14	9am-5pm	Live Webinar

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

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FINANCIAL MODELLING

Building a Model (of a Company) This hands-on course focuses on the skills required to design and create an interactive financial model of a company that adheres to the highest industry standards. The course material includes model design, logic, construction, financial concepts, and accounting treatment. During the seminar, participants will build a model that includes a forecast of a company's income statement, cash flow statement, and balance sheet.	Nov-02 Feb-27	9am-5pm 9am-5pm	Live Webinar Live Webinar
Financial Modeling in Excel This interactive workshop is designed to equip finance professionals, business owners, and entrepreneurs with the necessary skills to create effective financial models. It will provide you with practical knowledge and hands-on exercises to help you develop robust financial models that support decision-making and drive business growth.	Two Segments Dec-19 & Dec-20	8:30am-12pm	Live Webinar

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

PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT

COMMUNICATION & NEGOTIATION

Assessing and Responding to Workgroup Conflict Discover a framework for identifying and assessing workgroup conflict, a toolbox of response processes, and an approach to making reasoned, defensible decisions about which tool to use when. The focus throughout is on fostering the behaviours that drive enterprise success, and on minimizing the incidence and impact of behaviours that create a risk of harm.	Nov-16	9am-12:30pm	**In-Person, Vancouver**
Communicating Effectively Under Pressure Explore situations where you may feel pressure, and learn practical strategies to manage these situations effectively.	Two Segments Nov-14 & Nov-15	9am-12:30pm	Live Webinar
	Nov-22	9am-5pm	**In-Person, Vancouver**
	Two Segments Mar-12 & Mar-13	9am-12:30pm	Live Webinar
Communicating with Influence Ever been caught in the communication circle of, “That’s not what I said – that’s not what I meant”? Attend this seminar to learn new skills to clearly and effectively get your message across, and communicate with influence to support your success as a leader and manager.	Two Segments Nov-09 & Nov-10	9am-12:30pm	Live Webinar
	Feb-15 & Feb-16	9am-12:30pm	Live Webinar

» **READ** instructor Sharon Edwards’ article on this subject matter or listen to her podcast episode.

NEW **Conflict Resolution Skills** Workplace conflict can be defined as any situation where multiple parties have opposing needs and may range from everyday issues between people that have good relations to more serious situations involving significant interpersonal tension. Regardless of the conflict, a skilled communicator will seek to resolve it in a way that maximizes both the substantive outcome and the relationship. This seminar will focus intensively on practicing tools to build a high level of confidence.	Nov-09	9am-12:30pm	Live Webinar
Conflict: Changing Viewpoints and Influencing Behaviors In this highly practical course, learn how to turn conflict into opportunities for problem solving and how to deal effectively with confrontation and criticism. Discover your “hot buttons” and develop self-control.	Three Segments Feb-06, Feb-07 & Feb-08	9am-12pm	Live Webinar
Effective Presentation and Public Speaking Skills Workshop for Accountants Presentation skills are a great asset in developing a business career. This full-day workshop is designed to give accounting professionals increased confidence and skills in building and delivering presentations.	Nov-24 Dec-04	9am-5pm 9am-5pm	**In-Person, Vancouver** Live Webinar
NEW **Essential Communication Skills** A master negotiator is a good communicator – this session explains how you can become one at the bargaining table. Explore how negotiators communicate, how to disagree with escalating differences, the smartest thing to say that brings the greatest rewards, and other tips on building communication skills for negotiating. Note: Eligible towards completing Negotiating Mastery Certificate	Dec-07	9am-12pm	Live Webinar

Giving and Receiving Feedback in the Workgroup — Nov-23 — 9am-12:30pm — Live Webinar

This interactive workshop addresses one of the key reasons why people avoid giving or receiving feedback in the workgroup: they don't know how. Learn a practical, effective framework for giving and receiving feedback in a workgroup context. Discover specific tools and techniques 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.

NEW **Human Behaviour and Cultural Differences** — Mar-06 — 9am-12pm — Live Webinar

This session explains the predictability of human nature at the bargaining table and the skill of applying psychological influence for advantage. Explore topics such as negative and positive interaction cycles, dealing with bias, negotiating globally, insights on negotiating with different cultures, and more.

Note: Eligible towards completing Managing for High Performance Certificate

Lead Better Online and Hybrid Meetings — Nov-21 — 8:30am-12pm — Live Webinar

Who says online meetings have to be painful? By harnessing technology, best practices in online facilitation, and clear communication principles, you can run better online and hybrid meetings. Explore how to level up virtual meetings so you can better connect with your audience, have productive conversations and save time.

» **READ** instructor Corinne Impey's article on breaking down communications breakdowns.

Negotiation Skills	Oct-26	9am-12:30pm	Live Webinar

The ability to negotiate effectively both internally and externally differentiates how an individual contributes to the team. This workshop is based on the four-part model in the world-renowned book Getting to Yes: Negotiating Agreement Without Giving In by Fisher and Ury. The majority of the workshop is spent working on actual negotiations (past, current, and future) that the participants face, with a heavy emphasis on practice and coaching by peers and the facilitator.

» **READ** Laura Villacruisis' article on how to achieve the best negotiation outcomes or listen to her podcast episode.

NEW **Power, Creativity and Timing**	Feb-28	9am-12pm	Live Webinar

Some regard these three elements – power, creativity, and timing – as the most important in the master negotiator's arsenal of skills. Explore the myths and fallacies about power, how to deal with overwhelming power, your predominant negotiating style, creative negotiating, and other topics.

Note: Eligible towards completing Negotiating Mastery Certificate

NEW **Tactic Recognition and Response**	Dec-05	9am-12pm	Live Webinar

This session explains how to create competitive advantage through tactical knowledge. Obtain a glossary of negotiating tactics, and explore topics such as the spectrum of negotiating styles, classic win/lose maneuvers, dealing with unreasonable negotiators or pathologically difficult people, and stratagems for winning arguments.

Note: Eligible towards completing Negotiating Mastery Certificate

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NEW **Team Bargaining and Mediation** This session explains how the principles of negotiation apply to team bargaining and high-performance mediation. Explore topics such as intra-group bargaining, why people act differently in groups, managing team dynamics, mediating, the primary barriers to resolution, and mediator tactics. Note: Eligible towards completing Negotiating Mastery Certificate	Mar-13	9am-12pm	Live Webinar
NEW **The Framework for Negotiating Mastery** This is the foundation course for the Negotiating Mastery Certificate Program. Discover what negotiating mastery is and how you get there. Explore topics such as differentiating fact from fiction, ethics in negotiating, core negotiator needs, how to make losers feel like winners, identifying the needs that drive the numbers, deciphering “last and final” offers, key discovery questions, and more. Note: Eligible towards completing Negotiating Mastery Certificate	Oct-25 Feb-13	9am-12pm 9am-12pm	Live Webinar Live Webinar
NEW **The Negotiating Process Simplified** This session explains the structure, stages, ingredients, and critical rituals of negotiating. Attend this session to find out the number one error negotiators make, how to set your objectives, agenda setting, achieving alignment and rapport, how to develop a repertoire of non-escalating responses, what to say when you don’t know what to say, and more. Note: Eligible towards completing Negotiating Mastery Certificate	Nov-01	9am-12pm	Live Webinar

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NEW The Power of the Pen

That most of us have reduced the power of the pen in our lives to lists and meeting notes is a travesty. There are so many more powerful and innovative ways to use a pen and paper to get you thriving in your life, work, and leadership. These simple tools are accessible anytime, anywhere, and will help you with everything from regular planning and priority setting, to mental health, to navigating tricky relationships, to making decisions with confidence.

Five Segments Nov-17, Nov-24, Dec-01, Dec-08, & Dec-15	12:30pm-1:30pm	Live Webinar

Tools for Communicating with Difficult People

Learn how to deal with your reactions to others and self-manage your own. Discover techniques to respectfully but assertively conduct difficult conversations.

Two Segments Dec-07 & Dec-08	9am-12:30pm	Live Webinar
Feb-22 & Feb-23	9am-12:30pm	Live Webinar

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

Upgrade Your Public Speaking and Presentation Skills

Be empowered with the knowledge and tools you need to present with confidence. Learn how to understand your audience, craft and deliver a compelling presentation no matter the topic, and show up in an authentic way – nerves and all. From client conversations, virtual calls or board meetings, improving your public speaking and presentation skills will serve you well for years to come.

Nov-14	8:30am-12pm	Live Webinar
Mar-06	8:30am-12pm	Live Webinar

Virtual Presentation Design and Delivery Certificate Program	Six Segments Oct-13, Oct-20, Oct-27, Nov-03, Nov-10 & Nov-17	9am-11am	Live Webinar

For the foreseeable future, delivering virtual presentations to internal and external audiences will be a critical professional skill. This six-module certificate program will demonstrate to your organization, clients, potential employers, and other key stakeholders that you can design and deliver engaging and effective professional virtual presentations. Sessions include:

- Virtual presentation basics
- Technical requirements for virtual presentations
- Instructional design for virtual presentations: Part 1
- Instructional design for virtual presentations: Part 2
- Virtual presentation delivery skills: Part 1
- Virtual presentation delivery skills: Part 2

Note: Eligible for Virtual Presentation and Delivery Certificate

» **SEE** page 134 for more details on this program and watch this short video on why you should attend

Write to be Read	Dec-12	9am-12:30pm	Live Webinar
	Feb-06	9am-12:30pm	Live Webinar

Learn how to improve the readability of your writing, and how to write in ways that fit with how reading patterns have changed due to technology's impact. Discover other tips and techniques for writing efficiently and effectively.

» **READ** instructor Sharon Habib's article on How to Strengthen Your Writing Skills (and Why You Should).

Writing for Clarity and Impact	Nov-16	8:30am-12pm	Live Webinar
	Mar-13	8:30am-12pm	Live Webinar

When it comes to writing, we've all developed bad habits we would benefit from leaving behind. Explore ways to improve your written communication and unpack some of the common communication pitfalls that may be getting in the way.

» **READ** instructor Corinne Impey's article on the three Cs of effective communication

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

CREATIVE THINKING & DECISION MAKING

Setting Concrete Goals and Metrics Learn how to set crisp, clear, meaningful goals and metrics for everything that is really important, including both "hard" and "soft" goals, making it easier for you to discuss and manage performance, develop skills, and even core values.	Dec-05	8:30am-12pm	Live Webinar

» **DIDN'T FIND A SEMINAR?** Other Creative Thinking & Decision Making titles may be available on-demand.

SELF-MANAGEMENT & WELLNESS

Brain Focus: The Power of Full Engagement A full-day course packed with strategies to help your productivity and improve your focus to work smarter all day long.	Oct-31 Nov-29	9am-12:30pm 9am-12:30pm	Live Webinar **In-Person, Vancouver**
Coach Yourself First Gain a deeper understanding of your personal coaching style and its impact on others. Discover the power of personal passion, engagement, and purpose to manage yourself and coach others to be effective coaches.	Oct-24 Nov-15 Feb-21	9am-5pm 9am-5pm 9am-5pm	**In-Person, Vancouver** Live Webinar Live Webinar
NEW **CPA Skills That AI Can't Beat** The CPA's relationship to clients is their most valuable asset. Clients are not just external, but also include those within your own organization – in the broader sense, clients are everyone you work with at any time. How important is it to you that they see you as a trusted advisor? Examine the client relationship with both internal and external clients, and what skill sets CPAs will need that AI won't be able to copy.	Nov-23	8:30am-10am	Live Webinar

Critical Thinking and Self Reflection Designed for leaders who want to develop their critical thinking skills to enhance personal effectiveness, this seminar will diagnose your learning style, introduce critical thinking tools, and help you develop an action plan.	Oct-19 Nov-09 Feb-22	9am-5pm 9am-5pm 9am-5pm	Live Webinar **In-Person, Vancouver** Live Webinar
Emotional Intelligence (EQ) - The Myths and The Mastery The research is crystal clear – regardless of the type of work, EQ is the cornerstone of superior performance. When star performers were analyzed the one consistent common denominator was, they had healthy EQ! The purpose of this course is to demystify EQ, help people assess their current level of EQ, and most importantly, provide proven and practical strategies on how to develop one's EQ.	Dec-05	9am-12:30pm	Live Webinar
Enhancing Your Management Skills This half day workshop is designed to build leadership and people skills for those who are looking to move into management roles, new managers, or experienced managers looking to lead more effectively.	Dec-08	9am-12:30pm	Live Webinar
Influence and Assertiveness Designed for individuals wishing to develop their influence and assertiveness to increase their impact within their organization, this highly interactive seminar will provide tools and techniques, and will help develop an action plan for the future.	Nov-21	9am-5pm	Live Webinar

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NEW **Path to Promotion: The Succession Planning Playbook** This course is designed to help small and medium organizations and those with limited in-house leadership development resources to create a succession planning process to build their leadership pipeline. Discover the steps needed to develop team members and prepare people for succession, including succession planning, assessment, training, and coaching.	Dec-06	8:30am-12:30pm	Live Webinar
Personal Effectiveness: Self Awareness and Balanced Thinking Successful people have one thing in common – they learn by doing and by applying their experience to day-to-day activities. This one-day, highly interactive course identifies the links between our self-understanding, personal growth, communication and management styles, and critical thinking, both in our working and personal lives.	Dec-14	9am-5pm	Live Webinar
Productivity Hacks to Get More Done in Less Time Endless meetings, bottomless spreadsheets, constant reporting deadlines. As an accountant, do you feel like you're drowning in work? You're not alone. Today, more than ever, finance and accounting professionals are expected to deliver more, quicker. Learn how to leverage automation and regain control of your time to become more efficient and boost your career.	Nov-16	8:30am-10:30am	Live Webinar

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Resiliency and Grit: Bounce Back from Adversity and Challenge

Two Segments
Oct-16 & Oct-18 | 8:30am-12pm | Live Webinar

Do you have the resiliency and grit you need to bounce back quickly from setbacks, gain strength from adversity, and model, support, and encourage those qualities in yourself, your family, and work colleagues? Through stories, exercises, and examples you will learn how to apply the thinking and take action that leads to greater ease, confidence, and effective outcomes in your life and career. Leave with actionable insights and valuable tools.

» **READ** instructor Tammy Robertson's article on a September reboot.

NEW **Rethinking Impostor Syndrome™: Understanding and Addressing Impostor Syndrome in the Workplace**

Feb-08 | 9am-12:30pm | Live Webinar

You don't have to identify with impostor syndrome to benefit from this session. If you lead, manage, mentor, or train others, you need to understand impostor syndrome. This workshop will reveal what impostor syndrome is and who is most susceptible. Walk away with practical, immediately usable tools to help yourself and/or the people you lead, manage, or mentor.

» **READ** instructor Jessica Metcalfe's articles on imposter syndrome, and breaking the cycle of perfectionism.

NEW **The Emotionally Strong Leader Book Club**

Five Segments
Nov-08, Nov-15, Nov-22, Nov-29 & Dec-13 | 9am-11:30am | Live Webinar

Many see the words "emotional" and "strong" as contradictory terms that do not belong together when describing leaders. Over the course of five weeks, and working in tandem with the book, The Emotionally Strong Leader, An Inside-Out Journey to Transformational Leadership, cover the six-step self-coaching model to enhance your emotional intelligence. Coaching yourself through the model will help you uncover your barriers to growth and change, set goals for yourself, and tap into your motivation, giving you the tools and drive to manage the hurdles life throws at you.

» **READ** instructor Carolyn Stern's article on emotional intelligence.

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The Focused CPA - Finding and Maintaining Focus in the Age of Distraction One of the greatest challenges for CPAs today is maintaining a focused mind amidst a sea of distractions and competing interests. Obtain the knowledge, tools, and practices to find your focus and maintain it. You can expect to gain anywhere from 30 to 90 minutes per day (or more) of productive time, or time spent on what matters most in your life.	Two Segments Nov-02 & Nov-03	8:30am-12pm	Live Webinar

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

The Four Intelligences Using Stephen Covey's Four Intelligences as a base – intellectual, emotional, physical and spiritual, this session will explore tools and strategies to effectively navigate change, and examine the challenges and opportunities in leading through change.	Dec-12	9am-12:30pm	Live Webinar
The Power of Habit Now is the perfect time to reassess your habits and challenge yourself to live the life you really want. If you have been trying to make the same changes for years, it may be that you need a new approach to personal change. Discover how to find the real inspiration you need to make change and learn the success habits that build a happier, more productive life.	Two Segments Oct-23 & Oct-25	8:30am-12pm	Live Webinar
	Feb-26 & Feb-27	8:30am-12pm	Live Webinar
Time Management: The Essentials of Productivity Skills Discover a new mind-set and skill-set that will optimize your personal productivity. Learn how to gain and keep control of competing priorities, concurrent projects, and critical deadlines in this seminar that focuses on practicality.	Nov-08	9am-5pm	**In-Person, Vancouver**
	Dec-07	9am-5pm	Live Webinar
	Feb-20	9am-5pm	Live Webinar

Triple Your Reading Speed Learn how to quickly, easily, and dramatically improve reading speed and comprehension. In addition, discover how you can enhance your memory and improve your vocabulary, and receive motivational tips on goal-setting and advice on time management. » **READ** instructor Terry Small's article on reading comprehension.	Dec-06	9am-5pm	Live Webinar
We Have to Talk - Having the Difficult Conversations In a recent Google search, dozens of books on the topic of crucial, fierce, important conversations were found. One common theme emerges from this literature – the fear of difficult conversations is often more stressful than the actual conversation. This workshop places difficult conversations at the core of successful work relationships.	Dec-12	9am-5pm	Live Webinar

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

TEAMWORK & LEADERSHIP

Advanced Resilient Leadership - Brave Spaces and a Curious Mindset: Amp Up the Learning

Nov-27	8:30am-12pm	Live Webinar
Mar-12	8:30am-12pm	Live Webinar

Is it time to think again? Is your team learning and unlearning? Old beliefs and stale thinking can keep teams stuck and unproductive. How can you support your team to keep stepping up to new challenges, learn fast, and continue to perform? This session is packed with a dozen ideas leaders can apply so people are excited to learn together, share ideas, ask questions, make suggestions, and improve over time.

Note: Eligible towards completing Advanced Resilient Leadership Certificate

Advanced Resilient Leadership - From Languishing to Flourishing: How to Get Happy at Work

Dec-12	8:30am-12pm	Live Webinar
Mar-26	8:30am-12pm	Live Webinar

Leave inspired about what is possible when you focus on opportunities for real joy in the workplace. What would happen if people finished every day of work thinking, “that was awesome”? It is the uplifting moments we remember because we learned something, felt proud of something, laughed and smiled about something, or had a real moment of connection with someone. This session will outline ways to make those days happen more often.

Note: Eligible towards completing Advanced Resilient Leadership Certificate

Advanced Resilient Leadership - From Success to Significance: Make Work Meaningful

Dec-05	8:30am-12pm	Live Webinar
Mar-19	8:30am-12pm	Live Webinar

How does an accountant make work meaningful? In so many ways. If you are beginning to ask this question and are ready to take some concrete actions to bring purpose to work, this session will help. Learn strategies to optimize your group’s environment, language, rituals, and structures to bring more energy and attention to what makes work meaningful and satisfying.

Note: Eligible towards completing Advanced Resilient Leadership Certificate

Advanced Resilient Leadership - From Toxic to Terrific: Change Your Team for the Better This session will help you develop a game plan to move teams from isolated to all in. Helping your team move away from apathy, cynicism, and negativity, and towards caring, optimism, ownership, positive energy, and resilience is not a waiting game. It is a decision to take action. You will take away 10 useable ideas that you and your team can try out right now. Note: Eligible towards completing Advanced Resilient Leadership Certificate	Nov-21 Mar-05	8:30am-12pm 8:30am-12pm	Live Webinar Live Webinar
NEW **Brilliant Boundaries** How many times have you thought or been told that you need to be better at setting boundaries? You are not alone. Women in particular struggle with leaky boundaries for some very good reasons. We also struggle with putting up boundaries because the way we are often told to do so doesn't feel true or aligned, and definitely not easeful! In this session your relationship with boundary setting will be transformed – thank goodness – along with learning very specific tips, tricks and tools you'll be able to apply in all areas of your life. Note: This seminar is included in the Women's Leadership Mini-Series	Dec-05	9am-11am	Live Webinar
NEW **Building a Strong Personal Brand in 2023** As the workplace changes, so too does personal branding. In this session we will explore the top strategies for personal branding in 2023 and beyond. Unpack the workplace trends that impact how to effectively create and promote a unique identity for yourself. Then learn the steps needed to refresh your personal brand in an authentic, strategic way. Welcome to personal branding 3.0! Note: This seminar is included in the Women's Leadership Mini-Series	Nov-07	9am-11am	Live Webinar

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

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NEW **Building and Fostering Trust** Trust is at the heart of every relationship, and it's especially critical in the workplace. And although it is the cornerstone of any successful team, it is a challenge for many to develop and maintain. Learn how trust increases team and individual engagement, creativity, and commitment emphasizing the value behind instilling connection, showing appreciation, and discovering fulfillment. Focus on trust at three levels: self-trust, relationship trust, and organizational trust and how each contributes to the success of teams and organizations.	Two Segments Nov-06 & Nov-17 Nov-20	 9am-12:30pm 9am-5pm	 Live Webinar Live Webinar
Building High Performance Teams Learn how to diagnose and remedy your team's capability to work smarter and accomplish more in less time, how to encourage genuine two-way feedback, become stress and dispute free, and "turn on" the new generation of knowledge workers who will ultimately determine your fate. Note: Eligible towards completion of the Managing for High Performance Certificate Program	Three Segments Dec-12, Dec-13 & Dec-14	 10am-12:30pm	 Live Webinar
Building Your Leadership Brand Why would really talented people want to work really hard for you? You must discover and nurture your own unique value proposition as a leader. What are you best at? What do you stand for? And how does all of that show up in how you lead your team? Learn how to build a leadership brand that is more valuable to your career and to your key stakeholders.	Dec-06	8:30am-12pm	Live Webinar
Coaching for Executive Excellence Learn effective coaching techniques and best practices, create great coaching relationships, and apply coaching in everyday management situations to empower your team to go beyond their own capacity.	Oct-30 Three Segments Jan-22, Jan-24 & Jan-25	9am-5pm 9am-11:30am	**In-Person, Vancouver** Live Webinar

Correcting Employee Problem Behaviour This seminar focuses on how to initiate timely, constructive conversations, offer candid and beneficial feedback, confront sub-par performance issues, and adroitly handle disagreements and pushback. **Note:** Eligible towards completing Managing for High Performance Certificate	Nov-30	9am-12pm	Live Webinar
Dispelling the Myth of "Effective Meetings": Engaging Virtual Meetings Your Employees Will Want to Attend The objective of this seminar is to have participants leave the session with a specific planning framework tool designed to assist their team in building meetings that are relevant, productive, engaging and yes, even welcomed by others in their organization.	Nov-21	9am-12:30pm	Live Webinar
Effective & Essential Management Skills This fast-paced and practical learning experience will enhance your tactical managerial and coaching skills. Learn how to drive high degrees of engagement, delegate, empower, and provide meaningful feedback to your team.	Nov-14 Mar-05	9am-5pm 9am-5pm	Live Webinar Live Webinar
Employee Delegation, Engagement, and Empowerment Most people assume that delegation and empowerment are "all or nothing": either I do it or you do it. But this is not the case at all. Done well, delegation drives employee engagement, empowerment, development, and retention. It helps ensure the work gets done right the first time. And it frees you up to attend to your higher-level leadership work. Explore several key practices to help you and your employees get the most out of delegating.	Nov-15	8:30am-12pm	Live Webinar

Empowering and Engaging Others In the current economic climate, and with the growing expectations of increasingly demanding employees, developing the competencies of leaders and managers is key to improving individual, organizational, and business performance. This highly interactive course provides leaders and managers with the tools and techniques, confidence and practice, to become highly effective managers.	Mar-07	9am-5pm	Live Webinar
Giving and Receiving Effective Feedback Communication remains a critical skill required for leaders. An essential element within our communication is the ability to give and receive effective feedback. Through interactive and hands-on activities, discover proven tools and techniques to better understand and enhance your skills in giving and receiving effective feedback. This practical approach will enable you to apply the acquired skills and knowledge across multiple scenarios and dealing with all levels of an organization.	Nov-22	9am-12:30pm	Live Webinar
High Performing Team Member Gain an awareness about what it takes to play a constructive role as a member of a high-performing team. Special emphasis is placed on the interpersonal skills that team members need, for example advocacy, listening, and conflict resolution. The workshop is based on Patrick Lencioni's five-step framework that includes the practices of building trust, resolving conflict, developing commitment, holding team members accountable, and achieving results.	Feb-14	9am-12:30pm	Live Webinar

» **READ** instructor Laura Villacruisis' article on how to develop high-performance teams or listen to her podcast episode.

How to Achieve Your Company Vision Through Effective Performance Review Many formal appraisal systems, if an organization even has one, provide little or no link to the corporate vision of the company. This course will show you how you can take your performance appraisal form in one hand, your company vision in the other, and tightly link the two together to achieve your corporate strategy	Dec-11	9am-12:30pm	Live Webinar
Improving Collaboration on Remote Teams for Better Teamwork, Engagement, and Performance The complexity of business today requires more sophistication and expertise than any one person can provide. This hands-on workshop is built around foundational collaborative practices that improve engagement, teamwork, and performance. Work on the use of these practices and tools for leading teams, team projects, and remote teams.	Mar-12	8:30am-12pm	Live Webinar
Influencing Without Authority A key skill relevant to leaders at all levels is the ability to positively influence people in such a way that others willingly alter their thoughts and plans. Learn the skills and processes required to influence others in getting things done.	Mar-14	9am-12:30pm	Live Webinar
Leadership and Coaching Equip yourself with the skills to become an effective and respected leader, able to turn compliance into commitment. Gain knowledge on strategic and inspirational leadership, shared core values, coaching for growth, and mentoring to enable others to fulfil their potential.	Oct-26 Nov-16 Mar-06	9am-5pm 9am-5pm 9am-5pm	Live Webinar **In-Person, Victoria** Live Webinar

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

Leading Professional Teams - Successfully Transitioning from Professional Expert to Team Leader Transitioning from a technical accounting expert to leading a team of accounting and other professionals is one of the most significant milestones in a person's career. It can, however, be a challenging transition. Leading teams means taking on new responsibilities and requires a broad portfolio of skills and an understanding of human psychology. Explore what it takes to lead teams effectively as well as the hurdles that trip up many aspiring team leaders.	Dec-15	9am-12:30pm	Live Webinar
NEW **Managing a Multi-generational Workforce** How employees approach their work is greatly influenced by when they grew up. Almost 60% of managers today experience conflicts between older and younger workers on a frequent basis. More than ever, they need to understand how these generational differences affect workplace productivity, efficiency, accountability, and the ability to embrace change. Learn how to integrate a multi-generational workforce into a cohesive and engaged high-performance team. Note: Eligible towards completing Managing for High Performance Certificate	Nov-15	9am-12pm	Live Webinar
Managing Change and Transformation Understand and respond to the continual process of business change and transformation. Learn how you can champion change efforts and manage the process through leadership, perseverance, risk-taking, and the enrolment of others.	Dec-13	9am-5pm	Live Webinar

ACCOUNTING & ASSURANCE
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- Management Accounting

ETHICS

FINANCE & ECONOMICS
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- Financial Modelling

PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT
- Communication & Negotiation
- Creative Thinking & Decision Making
- Self-Management & Wellness
- **Teamwork & Leadership**

PUBLIC PRACTICE MANAGEMENT

STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE
- Risk Management & Fraud
- Strategy, Governance & Human Resource

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

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

WEALTH MANAGEMENT

PD NEXUS DAYS

PD Nexus: Business & Innovation Insights We are undergoing a fourth industrial revolution, and the pace of change has never been faster. In order to stay abreast of change, we must be willing to learn, unlearn, and relearn. The opening plenary, Thinking for a Change, will give you tools to do this efficiently. Three breakout streams will allow you to explore technical topics such as ISSB standards, brush up on technology products, and gain new insights on how to thrive in an era of rapid change. New and expanded networking opportunities will allow you to connect with other attendees and presenters throughout the day.	Dec-13	8:30am-5pm	Vancouver Convention Centre West, Vancouver
Resilient Leadership - Balance Life, Work and Overwhelm How do you deal with work that never ends? Learn how to set up a routine that is productive, healthy, and sustainable. Get beyond "panic working" and look at tools to help you focus, energize, and allocate your time to the things that matter most. Note: Eligible towards completing Resilient Leadership Certificate	Nov-14	8:30am-12pm	Live Webinar
Resilient Leadership - Energize Your Team Through Uncertainty Leading in times of uncertainty is like driving in the fog. Discover how to bring more clarity and focus to your leadership and learn a simple three-part framework to help you lead through uncertainty and strengthen your team for the long haul. Note: Eligible towards completing Resilient Leadership Certificate	Oct-24	8:30am-12pm	Live Webinar

Resilient Leadership - Five Qualities of a Leader Who Thrives in a Crisis How leaders show up in this moment and what you stand for will be remembered for years to come. Discover the five qualities of a leader including insights and tools to assess and strengthen your ability to not only survive, but thrive, during a crisis. **Note:** Eligible towards completing Resilient Leadership Certificate	Oct-17	8:30am-12pm	Live Webinar
Resilient Leadership - Manage Your Mindset and Emotional Well-being Have you considered how you will remain optimistic and hopeful in front of your team and family, no matter what the situation? Dig into the need for leaders to make room for all kinds of emotions. Then learn to lead with strength and compassion while supporting emotional well-being and resilient mindsets. **Note:** Eligible towards completing Resilient Leadership Certificate	Nov-07	8:30am-12pm	Live Webinar
Resilient Leadership - Who's Listening? We're not listening. And no one is listening to us. Yet listening is essential to our times. Change the way you think about communicating with your team, family, and friends, and discover a roadmap on how to listen, and why being a good listener matters so much now. **Note:** Eligible towards completing Resilient Leadership Certificate	Nov-01	8:30am-12pm	Live Webinar
NEW **Taking the On Ramp: How to Successfully Navigate Leaving and Returning to Work** Women take leaves from work for many reasons – to have a family, to care for others, to travel, to learn, or for a well-needed break. Women want to enjoy their leave and return at the top of their game. Organizations want their talented women to come back. In this course, you'll learn the secrets to success – for both organizations and employees – to off-ramp for a leave, on-ramp, and continue to advance your career. **Note:** This seminar is included in the Women's Leadership Mini-Series	Oct-24	9am-11am	Live Webinar

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

NEW **The Power of Self-Coaching** Coaching in the workplace is one of the many practices leaders need to learn and master to support their teams. Many women find themselves lacking the necessary support to advance their careers and overcome barriers to success. However, as women leaders, we have the power to change this narrative by becoming effective coaches and mentors for the next generation of women in the workplace. **Note:** This seminar is included in the Women's Leadership Mini-Series	Nov-21	9am-11am	Live Webinar
What Do People Want? Motivating Yourself and Others An important role of managers in the workplace is to get things done through other people. To do this they need to be able to motivate employees, but that is easier said than done! This one-day, highly interactive course provides practical tools and techniques for understanding what motivates people and how to develop and maintain a motivated workforce.	Dec-07	9am-5pm	Live Webinar
Wiring Your Brain for High Impact Leadership Leverage the latest theories on the brain and how thinking habits influence our actions, especially with problem solving and conflict resolution. Discover brain engagement, and learning to lead with the brain in mind.	Oct-24 Nov-22	9am-5pm 9am-5pm	Live Webinar **In-Person, Vancouver**

» **LISTEN** to instructor Terry Small's podcast episode on how anyone can wire their brain for leadership.

Women in Leadership Certificate Program Any journey is best shared. This certificate program is designed to give you resources to thrive in your career, while building connections with other awesome women in the profession. You will learn and practice new skills, get to know yourself better, and share stories and experiences with women in the accounting profession. Take the next step in your leadership journey!	Eleven Segments Sep-12, Sep-19, Sep-26, Oct-03, Oct-10, Oct-17, Oct-24, Oct-31, Nov-14, Nov-21 & Nov-28	Refer to website for session times	Live Webinar
	Sep-13, Sep-28, Oct-1, Oct-26, Nov-08, Nov-23, Dec-06, Dec-21, Jan-10, Jan-25 & Feb-07	Refer to website for session times	Live Webinar

» **READ** more about the Women in Leadership Certificate Program on page 132.

Women's Leadership Mini-Series This mini-series covers new topics designed specifically for women in the accounting profession. Whether you've taken the Women's Leadership Series and want to go further, or you have a specific challenge you want to address, this series will give you new tools to achieve success, however you define it. Sessions include: • Taking the On-Ramp - How to Successfully Navigate Leaving and Returning to Work • Building a Strong Personal Brand in 2023 • The Power of Self-coaching • Brilliant Boundaries	Four Segments Oct-24, Nov-07, Nov-21 & Dec-05	9am-11am	Live Webinar

» **NOTE** that you can also register for individual sessions, but only series registrations will be eligible for a discount and limited-time access to session recordings.

» **READ** about facilitator Tanis Frame in our instructor spotlight on page 12.

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

» **READ** more on our leadership certificate programs on page 130.

PUBLIC PRACTICE MANAGEMENT

NEW **Alternative Minimum Tax (AMT) Changes – Tax Planning Impacts** The March 28,2023 Federal Budget announced changes to the Alternative Minimum Tax (AMT) effective for taxation years that begin after 2023. No draft legislation was included in the Notice of Ways and Means. This session will highlight the AMT changes, include numeric examples to show the impact, and review the new AMT planning issues. **Note:** This seminar is included in the Public Practice Series	Nov-09	9am-10:30am	Live Webinar
NEW **Best Practices in File Management, File Reviews, Documentation, and Self-Review** This session will provide participants with a checklist of items to continually monitor and complete for success: greater profitability while working fewer hours with less stress. Learn how each item on the checklist will impact firm profitability and overall well-being of the firm and team members. **Note:** This seminar is included in the Public Practice Series	Jan-10	9am-10:30am	Live Webinar
Branding & Marketing for Small Business As a business owner, it can be easy to push branding and marketing further down your to-do list. Review essential branding and marketing activities that will assist you in reaching your business goals. From visual identity (think logo, brand colours, and images), to online presence (think websites, social media, and other digital platforms), explore different tactics to help you harness the power of branding and marketing.	Oct-26	8:30am-12pm	Live Webinar

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WEALTH MANAGEMENT

PD NEXUS DAYS

CPA Firm Manager Leadership Skills Certificate Program

Eight Segments
Oct-12, Oct-19, Oct-26, Nov-02, Nov-09, Nov-16, Nov-23 & Nov-30 | 11am-1pm | Live Webinar

Demonstrate to CPA firms that you have learned essential communication and productivity skills that are key to being a manager. This eight-module certificate program was specifically designed to provide new managers working at a CPA firm with the important skills required as a manager and leader. Sessions include:

- Leading teams in a hybrid work environment
- Project management tools and techniques
- Managing your managers and partners
- Providing effective feedback to your staff
- Business development and networking
- Creative problem solving for managers
- Time management tools
- Professional ethics for managers

» **SEE** See page 134 for more details on this program, and watch a short video on some of the benefits of attending.

» **READ** instructor Garth Sheriff's article on managing hybrid teams.

NEW **CPA Firm Update**

Feb-07 | 9am-10:30am | Live Webinar

Professionals in public accounting practices face unique technology challenges compared to their clients. Accountants must provide their clients with a wide range of services efficiently, effectively, and securely. This session reviews significant trends and technologies for CPA firms, which will help participants understand their current and future choices

Note: This seminar is included in the Public Practice Series

Digital Marketing Essentials for Accountants

Nov-23 | 8:30am-12pm | Live Webinar

Digital marketing is one way to reach your business and career goals – it is essential for staying relevant in 2023 and beyond. Whether you are looking to build your client base, attract the right talent to your organization, or develop a stronger online presence, examine and understand the digital marketing tools that can help you get there.

Seminar Schedule
PD Passports
Nexus Days
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Certificate Programs

NEW **Lawsuits Against CPAs: What They Look Like and How to Avoid Being a Target** — Sep-13 — 9am-10:30am — Live Webinar

This session will review recent lawsuit cases against CPAs, including the Supreme Court of Canada's Livent decision, and discuss the typical kinds of legal claims made against CPAs.

Note: This seminar is included in the Public Practice Series

NEW **Public Practice Series** — Six Segments Sep-13, Oct-11, Nov-09, Dec-06, Jan-10 & Feb-07 — 9am-10:30am — Live Webinar

Our Public Practice Series is designed especially for our public practitioners to update their technical knowledge and address some key changes and challenges in professional practice in BC today. Now is the time to connect with peers and explore new ideas with sessions on AMT, ethics, technology. These six relevant and practical topics will provide practitioners with reference materials and techniques to implement. Sessions include:

- Lawsuits Against CPAs: What They Look Like and How to Avoid Being a Target
- The 3 Foundations of Marketing for Independent Accounting Firms
- Alternative Minimum Tax (AMT) Changes – Tax Planning Impacts
- Why Good Accountants Do Bad Audits
- Best Practices in File Management, File Reviews, Documentation, and Self-Review
- CPA Firm Update

» **NOTE** that you can also register for individual sessions within the series, but only series registrations will be eligible for a discount and limited-time access to session recordings (with the exception of" Lawsuits Against CPAs").

NEW **The 3 Foundations of Marketing for Independent Accounting Firms** Uncover the secrets of successful marketing in the digital age for independent accounting firms. As the competition within the accounting industry escalates, it is vital to stand out - join us to learn the foundational and innovative marketing strategies that can drive your firm's growth and elevate your existing client communications. **Note:** This seminar is included in the Public Practice Series	Oct-11	9am-10:30am	Live Webinar
NEW **Why Good Accountants Do Bad Audits** This session will propose that the root cause of many audit deficiencies reflect ethical rather than technical issues. The "three C's" (Conflicts of interest, competition, consulting) will be discussed using current case studies, with consideration on what changes might improve professional ethics in the future. **Note:** This seminar is included in the Public Practice Series	Dec-06	9am-10:30am	Live Webinar

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

STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE

RISK MANAGEMENT & FRAUD

Fraud Happens - What to do When You Suspect Fraud

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

CPA PRO

Two Segments
Dec-04 & Dec-05 | 8:30am-12pm | Live Webinar

Available Online On-demand

Fraud Risk Management

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

CPA PRO

Two Segments
Feb-21 & Feb-22 | 8:30am-12pm | Live Webinar

Available Online On-demand

NEW **Managing Risk in Small Organizations - Fundamentals**

This seminar provides participants with the fundamentals of how to best manage risks in small and medium-sized organizations. Risk management methodologies and best practices will be introduced along with practical and real-life examples.

CPA PRO

Nov-02 | 9am-5pm | Live Webinar

Available Online On-demand

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

STRATEGY, GOVERNANCE & HUMAN RESOURCE

NEW **A Concise Understanding of Governance, Risk and Compliance Programs - A Critical Success Factor** This course will provide an understanding of the Governance, Risk and Compliance Programs ("GRC") and will demonstrate how to integrate these programs with the company's daily business activities.	Two Segments Dec-11 & Dec-12	9am-12:30pm	Live Webinar
Advanced Strategic Management Certificate: Links This case-based, interactive session takes participants through a process of analysis and review, allowing a big picture perspective, balanced with emphasis of key details and the importance of making hard choices throughout the process. **Note:** Eligible towards completing Advanced Strategic Management Certificate	Nov-16 Feb-08	9am-5pm 9am-5pm	**In-Person, Vancouver** **In-Person, Vancouver**
Advanced Strategic Management Certificate: Maps In this session, participants will gain experience in strategy mapping and integration. Using strategy mapping, participants will be able to understand how to assess and consider limited resources in strategic planning and how to best make hard choices between strategic alternatives, priorities, and resources. **Note:** Eligible towards completing Advanced Strategic Management Certificate	Nov-15 Feb-07	9am-5pm 9am-5pm	**In-Person, Vancouver** **In-Person, Vancouver**
Attracting and Retaining Talent in a Post-pandemic World The immense business risk due to turnover, lack of available talent, and the inevitable departure of those nearing retirement age creates an ever-increasing need to engage, retain, and replace key talent. Explore a practical approach to ensure individual and organizational success in attracting and retaining talent in both the short and long terms.	Oct-25 Feb-13	8:30am-12:00pm 9am-12:30pm	Live Webinar Live Webinar

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

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Employment Law and HR Practices Gain a practical perspective on the relationship between the legal landscape for (mostly non-union) employment in Canada, and day-to-day human resources activities that impact your organization.	Nov-07 Jan-23	9am-5pm 9am-5pm	Live Webinar Live Webinar
Employment Standards Overview This seminar provides an overview introduction to key provisions of the BC Employment Standards Act (ESA), with emphasis on new obligations and commonly misunderstood requirements. It will also cover any proposed or passed amendments to the ESA at the time of the presentation.	Feb-26 *Available Online On-demand*	9am-12:30pm	Live Webinar
NEW **Employment Standards Update and Pay Transparency Act Introduction** This seminar will provide a brief overview of amendments to the BC Employment Standards Act (ESA) as well a major decisions interpreting it, with emphasis on new obligations and commonly misunderstood requirements. In addition, it will review the requirements of the Pay Transparency Act, which comes into force in November 2023.	Nov-23 *Available Online On-demand*	8:30am-10:30am	Live Webinar
ERP Selection and Implementation The term ERP strikes fear in many, as most people have heard horror stories about implementations gone wrong. Eliminate those fears and obtain some answers on ERP systems for both small and large organizations, as well as the steps required to prepare for selecting, implementing, and supporting an ERP system.	Oct-25	8:30am-12:30pm	Live Webinar

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Software & Tools
WEALTH MANAGEMENT
PD NEXUS DAYS

Handling Termination of Employment This session will provide an overview of issues surrounding the termination of employment, and will include any recent updates in the area. Participants will receive a comprehensive summary of employer termination liabilities, become more aware of all the issues relating to termination of employment and learn a practical framework for planning.	Dec-14 *Available Online On-demand*	8:30am-10:30am	Live Webinar
Hire the Best, Keep Them and Fire the Worst The objective of every smart leader is to surround themselves with a team of bright and committed people. To achieve and then scale sustainable competitive advantage, you need to hire (and keep) those with the potential to grow. That's always been the indisputable imperative of every successful organization. Note: Eligible towards completing Managing for High Performance Certificate	Nov-28	9am-12:30pm	Live Webinar
How to Establish and Optimize Enterprise Risk Management Programs This seminar provides a practical understanding of the Fraud Risk Management (FRM) Guide introduced by COSO focusing on the transition of the traditional Fraud Risk Management methodologies to a Principle-Based Fraud Risk Management Framework. FRM, also is a critical element of an organization's Enterprise Risk Management (ERM) Program and considers the potential for fraud in assessing risks to the achievement of business objectives.	Two Segments Mar-07 & Mar-08	9am-12:30pm	Live Webinar

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***NEW* Introduction to ESG Reporting** — Dec-05 — 1pm-3pm — Live Webinar

This is part one of our new Introduction to ESG Reporting Series. Note that only this session is available as a stand-alone seminar. This introduction will aim to demystify ESG reporting and provide an update on recent regulatory developments related to ESG reporting.

***NEW* Introduction to ESG Reporting Series** — Four Segments Dec-05, Dec-08, Dec-12 & Dec-15 — 1pm-3pm — Live Webinar

This four-part series will highlight the importance of ESG reporting and how it is increasingly becoming integrated with financial reporting. The various existing ESG reporting standards and frameworks are only now being consolidated by the International Sustainability Standards Board, also now under the IFRS umbrella. This introduction will aim to demystify ESG reporting and provide an update on recent regulatory developments related to ESG reporting. Sessions include:

- Introduction to ESG Reporting
- Environmental Factors
- Social Factors
- Governance Factors

Mergers and Acquisitions – Aligning your Financial Systems, Processes & People — Nov-21 — 8:30am-10:30am — Live Webinar

Mergers and acquisitions have become a part of normal business for many companies and often these opportunities come when you least expect it. Walk through the steps required for aligning your financial systems, business practices, and people in this new organization.

Strategic Management Certificate: Change Management Learn how organizational and human dynamics impact change initiatives, how to plan for change, and examine the main ingredients necessary for successful implementation. Note: Eligible towards completing Strategic Management Certificate Program	Nov-08 Nov-16 Feb-14	9am-5pm 9am-5pm 9am-5pm	**In-Person, Vancouver** Live Webinar Live Webinar
Strategic Management Certificate: Risk Management & Governance Examine different types of risks which can undermine the achievement of an organization's objectives, and the management approaches and tools used to manage these risks. Note: Eligible towards completing Strategic Management Certificate Program	Nov-15 Nov-27 Feb-15	9am-5pm 9am-5pm 9am-5pm	**In-Person, Vancouver** Live Webinar Live Webinar
Strategic Management Certificate: Strategic Planning Examine the link between stated organizational goals, the business environment, and visible strategies, with a focus on the functional strategy level. Gain an appreciation of the tools used to develop and execute successful strategies. Note: Eligible towards completing Strategic Management Certificate Program	Nov-09 Nov-22 Jan-31 Feb-08	9am-5pm 9am-5pm 9am-5pm 9am-5pm	**In-Person, Vancouver** Live Webinar Live Webinar **In-Person, Vancouver**
Strategic Management Certificate: Team Development Gain an in-depth understanding of factors impacting team effectiveness, including team design, stages of team development, and ingredients necessary for achieving results. Note: Eligible towards completing Strategic Management Certificate Program	Dec-18 Feb-01	9am-5pm 9am-5pm	Live Webinar Live Webinar

NEW **The Essentials of Project Management** Discover the transformative potential of project management, and explore the numerous benefits that mastering project management skills can bring to your career and organization. This workshop aims to inspire you to embrace project management as a strategic competency and an essential tool for achieving success.	Two Segments Nov-27 & Nov-28	8:30am-12pm	Live Webinar
Workplace Law: All You Wanted to Know About and Were Afraid to Ask This course will cover the legal issues in workplace law that most frequently arise, impacting your organization's ability to deal effectively with human resources. Participants will be able to address with greater confidence workplace human resources issues that spill over into legal or potentially legal questions, and avoid common potential pitfalls in workplace legal issues.	Dec-05	9am-12:30pm	Live Webinar

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

» **THE STRATEGIC AND ADVANCED STRATEGIC MANAGEMENT CERTIFICATE PROGRAMS** are led by Mia Maki, Michael Morrison, and Simon Philp. Read Mia's article on Doughnut Economics and the push for regenerative, distributive systems. Read more about these programs on page 135 and watch the short videos on the Strategic Management and Advanced programs.

TAXATION

COMMODITY TAX

GST/HST - CRA Audit — Dec-08 — 9am-5pm — Live Webinar

Available Online On-demand

Building upon GST/HST - Fundamentals, this seminar provides an in-depth examination of the audit process. Participants will review a typical Canada Revenue Agency (CRA) audit from start to finish and learn about the most common audit exposures that create assessments for taxpayers. The seminar provides information to proactively prepare for a future audit, manage an audit, and cope with after-audit issues, including the assessment of penalties and the objection process.

CPA PRO

GST/HST - Fundamentals — Nov-20 — 9am-5pm — Live Webinar

Available Online On-demand

The course provides an overview of Canada's federal sales tax starting with a review of the significance of the three different types of supplies as their misinterpretation can create significant exposures for suppliers located in both non-HST and HST provinces. Registration, collection requirements, who pays tax, input tax credit entitlements, some cross border issues, and common sources of errors and assessments are reviewed.

CPA PRO

GST/HST - Real Property

This course explores the important GST/HST issues associated with real property transactions, including construction or substantial renovation of residential property, sale of real property including contract assignments, joint-ventures and partnerships, issues related to leasehold allowances and expense recoveries, and the special rules applicable to supplies of real property by charities and other public service bodies.

CPA PRO

Two Segments
Oct-25 & Oct-26 | 9am-12:30pm | Live Webinar

Available Online On-demand

GST/HST – Registered Charities and NFPOs

This seminar focuses on the unique rules applicable to public service bodies, including the distinction between charities and other non-profit organizations. Participants will gain a greater awareness of the application of GST/HST and exempting provisions applicable to this unique sector, including common pitfalls and errors. A case study will be used to illustrate and reinforce the application of some of the complex rules applicable to a typical non-profit organization.

CPA PRO

Two Segments
Nov-07 & Nov-08 | 9am-12:30pm | Live Webinar

Available Online On-demand

GST/HST - Specific Topics

Failure to be aware of the complexities of the GST and HST can result in lost recovery opportunities or worse, large tax assessments. This course presents advanced GST/HST topics to enhance the participant's knowledge about Canada's value-added-tax. Concepts related to the application and the recovery of GST/HST will be discussed in addition to an update on new and trending issues.

CPA PRO

Dec-05 | 9am-5pm | Live Webinar

Available Online On-demand

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

Indirect Tax - Update 2023 This course reviews the changes related to indirect tax in the last two years. Review and discussion of legislative changes, recent court cases and their application to GST/HST, overview of the new federal Underused Housing Tax, Select Luxury Items Tax, and case law updates will be included in this course. CPA PRO	Oct-26 Jan-23 *Available Online On-demand*	9am-12:30pm 9am-12:30pm	Live Webinar Live Webinar
PST - Review of Jurisdictional Sales Tax This seminar is intended to provide exposure to the application of the four different provincial sales tax regimes, including policy intent and application of a “use” tax compared to the application of a “value-added tax” (VAT). Participants will be able to determine when to register and which tax applies, find opportunities to use exemptions, know how costs are impacted by PST, and be better prepared to respond to government audit queries. CPA PRO	Nov-28 *Available Online On-demand*	9am-12:30pm	Live Webinar

» **DIDN’T FIND A SEMINAR?** Other Commodity Tax titles may be available on-demand.

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

CORPORATE & PERSONAL TAX

NEW Alternative Minimum Tax (AMT) Changes – Tax Planning Impacts

Nov-09	9am-10:30am	Live Webinar

The March 28,2023 Federal Budget announced changes to the Alternative Minimum Tax (AMT) effective for taxation years that begin after 2023. No draft legislation was included in the Notice of Ways and Means. This session will highlight the AMT changes, include numeric examples to show the impact, and review the new AMT planning issues.

Note: This seminar is included in the Public Practice Series

Corporate Restructuring - Fundamentals

Nov-15	9am-5pm	Live Webinar
Nov-20	9am-5pm	**In-Person, Vancouver**
Available Online On-demand		

This seminar highlights fundamental income tax considerations that arise in corporate reorganizations, including a discussion of related provisions and key pitfalls. Participants will gain a summary of the tools available to effect transfers or mergers in a tax efficient manner, and considerations of traps and anti-avoidance rules when entering into such transactions. Examples are used to highlight strategies and issues associated with the process of initiating a corporate reorganization.

Corporate Restructuring - Private Corporation Application

Nov-29	1pm-4:30pm	Live Webinar
Feb-16	9am-12:30pm	Live Webinar
Available Online On-demand		

Practitioners involved with reorganizing private corporations need to consider a wide range of technical rules, develop a plan that meets the client's objectives, navigate the practical challenges of implementing the plan, and communicate the plan to other professionals. Using mini-cases, this seminar provides a practical approach and guidance on identifying, planning, documenting, and implementing reorganizations of private corporate groups.

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Corporate Restructuring - Section 85: Transfer of Property This seminar covers selected tax aspects explaining the transfer of property to a corporation using the Section 85 rollover rules. Each module contains specific examples and cases designed to help participants review relevant tax theory and focus on major tax planning issues, including filing requirements and ensuring the transaction is not caught by key anti-avoidance provisions. CPA PRO	Dec-19 *Available Online On-demand*	9am-5pm	Live Webinar
Corporate Tax - Compliance and Planning in T2 Preparation This seminar addresses a comprehensive review of income tax compliance and planning issues relevant to the preparation of Canadian corporate income tax returns, including the technical and practical issues arising from these diverse issues as a means of enhancing the ability to prepare and/or review complete, accurate corporate income tax returns. This seminar identifies and addresses planning opportunities that can impact taxpayers filing corporate returns. CPA PRO	Nov-15 Nov-30 Jan-26 *Available Online On-demand*	9am-5pm 9am-5pm 9am-5pm	**In-Person, Vancouver** Live Webinar Live Webinar
Corporate Tax - Investment Holding Companies The taxation of investment holding corporations has seen a number of significant changes over the past few years. This course will review these and other changes using a number of examples, as well as examine the issue that is now faced by many clients – should I keep or wind up my investment corporation? CPA PRO	Nov-03 Nov-16 *Available Online On-demand*	9am-12:30pm 9am-12:30pm	**In-Person, Vancouver** Live Webinar

Corporate Tax - Purchase and Sale of a Business This seminar will provide an understanding and update of Canadian income tax issues for purchasers and vendors of businesses in Canada and their professional tax advisors. This course focuses on transactions between Canadian private business owners and/or their privately held corporations. CPA PRO	Nov-27 Dec-13 *Available Online On-demand*	9am-5pm 9am-5pm	**In-Person, Vancouver** Live Webinar
Corporate Tax - RDTOH, CDA and Other Tax Accounts This seminar provides a detailed review of the key tax accounts for private corporations and examines tax planning processes in the case of multiple tax accounts, including GROP, LRIP, CDA, and the three RDTOH pools. This seminar focuses on applying the understanding of these pools to effective tax planning. CPA PRO	Nov-03 Nov-24 *Available Online On-demand*	9am-12:30pm 9am-12:30pm	**In-Person, Vancouver** Live Webinar
Corporate Tax - Review of Tax Planning This two-day seminar provides practitioners with a refresher on technical and tax planning issues for corporations. Although the seminar reviews taxation for public and private corporations, the session primarily focuses on the taxation of private companies. CPA PRO	Two Segments Nov-09 & Nov-10 Mar-14 & Mar-15 *Available Online On-demand*	 9am-5pm 9am-5pm	 Live Webinar Live Webinar

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

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Corporate Tax - SBD and Private Corporate Groups

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

CPA PRO

Nov-02	9am-5pm	**In-Person, Vancouver**
Two Segments Nov-16 & Nov-17	9am-12:30pm	Live Webinar
Available Online On-demand		

Corporate Tax - Section 55: How Safe Are Your Dividends?

Section 55 of the Income Tax Act (ITA) contains anti-avoidance rules that can convert a tax-free intercorporate dividend to a taxable capital gain, and these rules now apply to a greater number of private corporations. Practitioners and other tax professionals must now consider Section 55 for all intercorporate dividends to avoid unexpected tax. This seminar provides an understanding of these rules and their application.

CPA PRO

Oct-30	9am-12:30pm	Live Webinar
Feb-27	9am-12:30pm	Live Webinar
Available Online On-demand		

Corporate Tax - Shutting Down the Corporation

This seminar will focus on the many tax issues that arise, from a compliance and planning perspective, when shutting down a corporation. Common traps and planning opportunities that arise when shutting down private corporations via dissolution, amalgamation or wind-up will be covered.

CPA PRO

Oct-18	9am-12:30pm	Live Webinar
Dec-18	9am-12:30pm	Live Webinar
Available Online On-demand		

Course	Date	Time	Format
Corporate Tax - SR&ED Part 1 This course addresses fundamental content on SR&ED. Participants are provided information and skills required to navigate the SR&ED claim process including: who is eligible, what types of work are eligible, and how the SR&ED program intersects with other government subsidies and stimulus payments. Part 1 covers the preparation of SR&ED claims and how to incorporate these claims into corporation tax returns. For advanced content on SR&ED, please see Corporate Tax – SR&ED – Part 2. cpa PRO	Nov-23 Feb-01 *Available Online On-demand*	1pm-4:30pm 9am-12:30pm	Live Webinar Live Webinar
Corporate Tax - SR&ED Part 2 This course builds on the fundamental content of Part 1 and presents more advanced content on SR&ED. Participants are provided information and skills required to navigate the SR&ED claim process including: who is eligible, what types of work are eligible and how the SR&ED program intersects with other government subsidies and stimulus payments. Part 2 focuses on current issues including updates to legislation and case law, CCPC status, government assistance, materials and ITC recapture. cpa PRO	Nov-30 Feb-08 *Available Online On-demand*	1pm-4:30pm 9am-12:30pm	Live Webinar Live Webinar
Current Strategies in Tax Dispute Resolution This half-day seminar is designed to introduce practitioners to the CRA dispute resolution process, and to provide an understanding of the importance of taking the appropriate steps as a means of obtaining cost-effective and efficient resolution to potential tax litigation matters.	Dec-06 *Available Online On-demand*	8:30am-12pm	Live Webinar

Income Tax - 5 Years of Developments

Income tax changes and evolves over time and professionals need to maintain their current stock of knowledge while learning about new trends. This seminar provides an opportunity for those who lack the ability to remain updated on continual changes by reviewing the most important federal income tax developments that have occurred over the last five years. Participants can quickly become knowledgeable about crucial tax updates in a single seminar.

CPA PRO

Date	Time	Format
Jan-17	9am-5pm	Live Webinar
Available Online On-demand		

Income Tax - Administration and Risk Management

This seminar focuses on the procedures and processes of practicing tax, highlighting areas to protect practitioners from liability. The seminar discusses technical issues in areas where CPA Professional Liability Plan claims show the greatest number and dollar value of claims. The session will also review the scheme of penalties and interest in the Act, the CRA's current administration of those provisions, and the use of the Taxpayer Relief provisions to reduce the cost of penalties.

CPA PRO

Date	Time	Format
Nov-06	9am-5pm	Live Webinar
Available Online On-demand		

Income Tax - Advanced Planning Strategies

This seminar focuses on the procedures and processes of practicing tax, highlighting areas to protect practitioners from liability. The seminar discusses technical issues in areas where CPA Professional Liability Plan claims show the greatest number and dollar value of claims. The session will also review the scheme of penalties and interest in the Act, the CRA's current administration of those provisions, and the use of the Taxpayer Relief provisions to reduce the cost of penalties.

CPA PRO

Date	Time	Format
Oct-27	9am-5pm	**In-Person, Prince George**
Nov-07	9am-5pm	**In-Person, Victoria**
Nov-22	9am-5pm	**In-Person, Vancouver**
Nov-29	9am-5pm	Live Webinar
Feb-20	9am-5pm	Live Webinar
Available Online On-demand		

Income Tax - Consequences to Avoid Straightforward and seemingly benign situations can sometimes trigger adverse income tax repercussions and this seminar will equip participants with the skills to identify, prevent, and manage these outcomes. This seminar explains the income tax rules and reasons behind the negative result ensuing from particular situations. Participants will receive suggestions to manage and mitigate problems, as well as tips for recognizing relevant precursors and triggers. CPA PRO	Dec-08 *Available Online On-demand*	9am-5pm	Live Webinar
Income Tax - Employee Benefits This seminar provides a review of the income tax implications for benefits, including cases of owner-managers and arm's length employees. Participants will increase their ability to advise on tax-effective employee remuneration strategies with benefits plans by assessing the tax-effectiveness of various benefit plans and employment benefit choices as well as ensuring compliance with the tax rules. CPA PRO	Dec-04 *Available Online On-demand*	9am-12:30pm	Live Webinar
Income Tax - Employee vs. Contractor This course focuses on the tax consequences of classifying a worker as an employee versus independent contractor. Legal and operational implications of the employee vs contractor classification beyond the Income Tax Act, CRA guidelines, tax rates, and risk analysis will be discussed with practical examples and case discussions to allow for participant application. CPA PRO	Nov-15 *Available Online On-demand*	8:30am-12pm	Live Webinar

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Income Tax - Everyday Issues for General Practitioners

CPAs in public practice who assist clients with income tax compliance and plans find that even routine matters can have complexities, alternatives and uncertainties. This seminar provides an opportunity for practitioners, who routinely deal with income tax, to focus on issues they frequently encounter. Practical issues are presented as examples and the seminar emphasizes opportunities, problems, suggestions, and plans for each topic.

CPA PRO

Date	Time	Format
Nov-28	9am-5pm	**In-Person, Surrey**
Dec-06	9am-5pm	**In-Person, Kelowna**
Dec-08	9am-5pm	Live Webinar
Feb-06	9am-5pm	Live Webinar

Available Online On-demand

Income Tax - Income Splitting

The Income Tax Act contains several measures related to income splitting; and while some are permissive, most are restrictive. This seminar covers the tax benefits of income splitting, provides a detailed review of relevant income tax legislation, including the expanded TOSI rules, and reviews remaining opportunities to accomplish income splitting.

CPA PRO

Date	Time	Format
Nov-22	9am-5pm	Live Webinar

Available Online On-demand

Income Tax - Investment Income

Figuring out the amount to report investment income and how exactly to report it on income tax returns is becoming more complex as banks and online brokerages make it easier for investors to access more complex investment products. This course reviews the basic concepts of income vs capital and timing of income/gain recognition and apply them to investment products currently in the market, including put/call options and cryptocurrency.

CPA PRO

Date	Time	Format
Oct-30	9am-12:30pm	**In-Person, Vancouver**
Nov-20	9am-12:30pm	Live Webinar

Available Online On-demand

Income Tax - Owner and Manager Compensation This seminar provides participants with a working knowledge of the tax effects of the use of salary and dividends as compensation to owner-managed business from both the shareholder and corporate perspective. Using case study examples, the course will look at inter-corporate transactions for small businesses including management fees, rent, and intercompany loans. CPA PRO	Nov-24 Dec-15 *Available Online On-demand*	9am-12:30pm 1pm-4:30pm	Live Webinar Live Webinar
Income Tax - Partnerships Partnerships are commonly used business vehicles/structures and it is important to know how the taxation rules differ in order to advise clients with or considering partnership structures. This course examines the manner in which partnerships and their partners are taxed, with reference to the relevant statutory provisions, case law and CRA administrative positions. CPA PRO	Nov-28 *Available Online On-demand*	9am-5pm	Live Webinar
Income Tax – Planning for Business Succession This seminar provides practical knowledge of the principal business succession considerations. Participants will walk through the various stages of a business life cycle, with a view to identifying opportunities, techniques and tax considerations associated to intra-family and arm's length succession planning for private companies. This seminar provides the knowledge and tools necessary to identify, plan and manage business succession considerations for owner-managers of private companies. CPA PRO	Oct-19 Jan-25 *Available Online On-demand*	9am-5pm 9am-5pm	Live Webinar **In-Person, Vancouver**

Income Tax - Principal Residences Many Canadians own a principal residence, but they often assume that the gain on the sale of their home is tax free and may lack an understanding about the tax implications of other transactions involving these properties. This seminar examines all aspects of principal residences from a federal tax perspective, including ambiguous situation and the unexpected issues or outcomes that can arise in such cases. CPA PRO	Oct-20	9am-12:30pm	Live Webinar
	Nov-17	9am-12:30pm	**In-Person, Vancouver**
	Feb-21	9am-12:30pm	Live Webinar
	Available Online On-demand		
Income Tax - Real Estate Real estate transactions usually involve large amounts of capital, and can be impacted significantly by tax rules and restrictions. This seminar identifies and reviews significant income taxation issues arising from various aspects of real estate activities and includes practical, business-focused suggestions for dealing with such issues. CPA PRO	Nov-02	9am-5pm	**In-Person, Vancouver**
	Nov-03	9am-5pm	Live Webinar
	Available Online On-demand		

Income Tax - Update 2023

Providing a high-level summary of tax law changes in the past year, this seminar examines current changes and relevant issues in taxation that affect individuals and most businesses in the private sector. Learn how the current levels of personal and corporate tax rates affect and possibly change accepted tax planning techniques. A review of the current integration of personal and corporate tax rates is provided. Course coverage will be largely restricted to changes in the last year.

CPA PRO

Oct-17	9am-5pm	Live Webinar
Oct-20	9am-5pm	**In-Person, Kelowna**
Oct-23	9am-5pm	Live Webinar
Oct-24	9am-5pm	**In-Person, Vancouver**
Oct-25	9am-5pm	**In-Person, Burnaby**
Oct-26	9am-5pm	**In-Person, Pr George**
Oct-28	9am-5pm	Live Webinar
Nov-04	9am-5pm	Live Webinar
Nov-06	9am-5pm	**In-Person, Victoria**
Nov-08	9am-5pm	**In-Person, Richmond**
Nov-10	9am-5pm	**In-Person, Coquitlam**
Nov-15	9am-5pm	**In-Person, Surrey**
Nov-17	9am-5pm	**In-Person, Vancouver**
Nov-17	9am-5pm	Live Webinar
Nov-20	9am-5pm	Live Webinar
Nov-24	9am-5pm	**In-Person, Vancouver**
Nov-29	9am-5pm	Live Webinar
Dec-01	9am-5pm	Live Webinar

See more dates on next page

Income Tax - Update 2023 *(continued)*

Providing a high-level summary of tax law changes in the past year, this seminar examines current changes and relevant issues in taxation that affect individuals and most businesses in the private sector. Learn how the current levels of personal and corporate tax rates affect and possibly change accepted tax planning techniques. A review of the current integration of personal and corporate tax rates is provided. Course coverage will be largely restricted to changes in the last year.

CPA PRO

Date	Time	Format
Dec-05	9am-5pm	Live Webinar
Dec-08	9am-5pm	**In-Person, Vancouver**
Dec-09	8:30am-4:30pm	Live Webinar
Dec-11	9am-5pm	Live Webinar
Two Segments Dec-13 & Dec-14	1pm-4:30pm	Live Webinar
Dec-16	9am-5pm	Live Webinar
Dec-19	1pm-4:30pm	Live Webinar
Jan-18	9am-5pm	Live Webinar
Jan-20	9am-5pm	Live Webinar
Jan-22	9am-5pm	Live Webinar
Jan-27	9am-5pm	**In-Person, Vancouver**
Feb-16	9am-5pm	Live Webinar

Available Online On-demand

Income Tax Series

Dates TBA — Live Webinar

The world of tax is constantly changing. This series is designed to highlight emerging tax changes as they are announced, and provide a monthly update on a current tax area of importance to CPAs in both industry and public practice. Monthly 1.5-hour seminars will be held from October to February.

» **CHECK OUR WEBSITE** for more details.

Personal Tax - Compliance and Planning in T1 Preparation This seminar addresses technical and practical issues arising from the diverse issues encountered in the preparation and review of Canadian personal income tax returns. Participants will gain an overall understanding of tax compliance issues, enhancing their ability to prepare complete and accurate tax returns, and to identify and address planning opportunities which arise in the preparation of personal income tax returns. CPA PRO	Nov-16 Dec-12 Feb-06 *Available Online On-demand*	9am-5pm 9am-5pm 9am-5pm	**In-Person, Vancouver** Live Webinar Live Webinar
Personal Tax - Review of Tax Planning This two-day seminar in personal tax is designed for those who desire to update and refresh their knowledge in both technical and tax planning issues for individuals, trusts and partnerships, with a primary focus on the taxation of individuals. CPA PRO	Two Segments Oct-25 & Oct-26 *Available Online On-demand*	9am-5pm	Live Webinar
Tax for Controllers Controllers in small to mid-sized private companies have a wide range of responsibilities which can either have an impact on taxation or require tax related reporting. This two-day course is compliance oriented with a high level review of a wide range of issues and focus on issue identification. CPA PRO	Four Segments Dec-05, Dec-06, Dec-07 & Dec-08 *Available Online On-demand*	9am-12:30pm	Live Webinar

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

NOT-FOR-PROFIT ORGANIZATIONS

Taxation - Registered Charities and NFPOs This seminar will provide a detailed technical review of the numerous income tax issues faced by registered charities and NFPOs, including real-world examples and case studies to provide participants with practical and useful takeaways to avoid loss of tax status, financial penalties and bad press. Participants will gain the ability to identify tax issues, assess related risks, comply with the income tax rules and complete charity and non-profit organization returns. cpa PRO	Nov-29 *Available Online On-demand*	9am-4:30pm	Live Webinar

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

TRUSTS & ESTATES

PD Nexus: Estate Planning Insights Designed for estate planning practitioners including professional accountants, lawyers, trust officers, and other financial professionals, this Nexus Day will provide participants with up-to-date, practical, and leading-edge estate planning information, as well as access to highly regarded speakers covering current and relevant estate planning issues.	Oct-12	8:30am-5pm	Hyatt Regency, Vancouver
Probate Fee Avoidance Planning Review the fundamentals of when and why probate is required, and what property is subject to the process. Examine the various strategies that can be employed to avoid probate fees, and learn how individual strategies complement or hinder the achievement of other estate planning goals.	Feb-23 *Available Online On-demand*	8:30am-10:30am	Live Webinar

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RIP - Estate and Testamentary Trust Returns This seminar provides a review of the issues faced when preparing trust filings for deceased taxpayers. The focus is on the preparation of returns and related planning, including a review of relevant tax issues, engagement management, up-to-date sources of tax research, and CRA assessing practices. The seminar presents a series of practice case studies to illustrate the concepts in a practical manner and allows the participant to apply their knowledge to realistic filing situations commonly encountered in practice. CPA PRO	Nov-03 Nov-10 *Available Online On-demand*	9am-5pm 9am-5pm	Live Webinar **In-Person, Vancouver**
RIP - Estate Planning This seminar provides a detailed review of important estate planning matters for practitioners who deal with owner-managers or clients with a high net worth. Participants will gain enhanced estate planning skills, an introduction to important tax and estate planning concepts, useful tips, and an updated reference source. Participants will develop a working understanding of how to initiate and undertake effective estate planning for clients while maintaining flexibility in the estate plan to manage risk. CPA PRO	Nov-16 Dec-15 *Available Online On-demand*	9am-5pm 9am-5pm	**In-Person, Vancouver** Live Webinar

RIP - Terminal Filing

The last tax return for a deceased individual carries significant implications for the executor and the inheritors of the will. In order to alleviate potential misunderstandings, this seminar provides a detailed technical review of the numerous issues faced when preparing terminal or year-of-death filings. Participants will receive a review of relevant tax issues, engagement management, updated sources of tax research, an overview of CRA assessing practices and case studies.

CPA PRO

Nov-17	9am-5pm	**In-Person, Vancouver**
Dec-04	9am-5pm	Live Webinar
Available Online On-demand		

Taxation of Domestic Trusts - Advanced

This seminar covers tax issues surrounding family trusts, with a focus on complex tax planning opportunities, potential tax traps and technical challenges that may be encountered. A comprehensive analysis of the amendments to the Income Tax Act regarding tax on split income will be provided and participants will learn how to identify potential issues with current or proposed client structures to be able to propose solutions.

CPA PRO

Nov-03	9am-5pm	Live Webinar
Available Online On-demand		

Taxation of Domestic Trusts - Fundamentals

This course provides an overview of trust relationships, how to complete basic returns for trusts and their beneficiaries, and how to identify and communicate basic tax planning benefits and opportunities that involve family trusts. This course reviews the basic tenants of trust law, the provisions of the Income Tax Act, case law and CRA administrative positions that are fundamental to the taxation of trusts.

CPA PRO

Oct-27	9am-5pm	**In-Person, Vancouver**
Dec-01	9am-5pm	Live Webinar
Available Online On-demand		

To Be or Not to Be: The Executor - Powers, Obligations and Liabilities | Nov-29 | 8:30am-10:30am | Live Webinar

Gain sufficient knowledge so that you or your clients can make informed decisions as to whether you or they should take on the executor's role. Learn and examine the stages of estate administration from date of death through to distribution, final accounting, and release.

Available Online On-demand

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

US & INTERNATIONAL TAXATION

NEW **International Tax - Canadians Acquiring Shares of Foreign Affiliates and Subsidiaries** | Nov-24 | 9am-12:30pm | Live Webinar

Obtain a general overview of Canadian tax implications of investing and owning shares of foreign corporations or subsidiaries, especially those Canadian businesses that operate internationally or are considering expansion outside of Canada. Learn about the effective strategies to minimize tax for inbound and outbound clients and the tax implications of cross-border transactions such as Canadians doing business or investing overseas and transactions between members of multinational corporate groups.

Available Online On-demand

NEW **International Tax - Recent Changes to T1134, T106 and Voluntary Disclosure** | Oct-6 | 9am-12:30pm | Live Webinar

Gain an in-depth overview of complex foreign reporting and filings for Canadians such as the "New" T1134 filings to report investment in foreign affiliates, T106 filings to report transactions with related Non-Residents and T1135 filings for disclosure of foreign properties.

Available Online On-demand

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

TECHNOLOGY & INNOVATION

BUSINESS TRANSFORMATION & EMERGING ISSUES

3 Ways Digital Transformation is Reinventing Accounting	Feb-15	8:30am-12pm	Live Webinar

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

» **READ** instructor John Hetherington's article on Humanizing tech: The new way for accountants to add value or listen to his podcast episode.

Artificial Intelligence for Accounting and Finance Professionals	Oct-23	9am-12:30pm	Live Webinar

Artificial intelligence (AI) is a practical tool available today to help address and solve real-world problems. Learn about the fundamentals of AI and how they can be implemented today to help you and your team work more efficiently and effectively. Explore AI features available in everyday applications, and how they are changing the way accounting and financial professionals work, both today and in the future.

Blockchain Essentials for CPAs	Nov-09	1:30pm-5pm	Live Webinar

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

NEW **CPA Strategic Alignment: Align your Accounting System with your Strategic and Operating Plans** Departmental reporting and roll-up structures encoded into your accounting system will never be able to accurately align with strategic and operational goals, because it's like comparing apples to oranges. This session will help you to understand the power of a strategically aligned accounting system and take you through all the steps to set up a fully-aligned strategic accountability and reporting (STAR) framework.	Nov-22	10am-12pm	Live Webinar
Data Analytics for Accountants and Auditors Virtually all business professionals have become data analysts, at least to some extent. However, that is particularly true in the field of auditing, where internal and external auditors are increasingly turning to data analytics to identify situations requiring follow-up and investigation. Explore various tools and techniques you can use for more thorough analyses of data, including Excel, Excel add-ins, and Microsoft's Power BI application.	Feb-07	9am-12:30pm	Live Webinar
Emerging Technologies for Accountants, Including Blockchain and Cryptocurrencies Unlike technologies we use every day, many emerging technologies have the potential to change how we work in the future. This session will cover an assortment of technologies which are nearing mainstream adoption and help you understand what they do, how they work, as well as some of the potential risks and rewards they offer potential users.	Nov-17	9am-12:30pm	Live Webinar
Foundations of Blockchain Gain a holistic overview of blockchain from a business (non-technical) perspective, including what it is and what it can do, how it is being applied today, and its potential to transform business and industry.	Nov-09	9am-12:30pm	Live Webinar

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

NEW **How to Adopt Finance Technology Without the Usual Headaches and Drama** Technology advances are disrupting businesses and the pace of digital change is accelerating. Discover how to navigate disruption and leverage best practices in technology delivery to grow your business.	Dec-07	8:30am-12pm	Live Webinar
Securing Your Data - Practical Tools for Protecting Information Security is not optional, and yesterday's security techniques do not minimize today's security threats. Now is the time for you to tune up what you know about protecting sensitive data. Discover the latest tools and techniques for securing your data, including encryption, virus protection, safe communications, electronic signatures, secure authentication, and more. Learn how to implement a practical, five-step approach to securing your PC and the questions you should ask your staff to ensure server-based information remains protected.	Nov-08	9am-12:30pm	Live Webinar
Technology for CPAs – Don't Get Left Behind Survey today's IT environment and learn about computer hardware, software (including Office 2016), operating systems (including Windows 10) and what they mean for you, as well as peripheral devices. Learn about significant trends in information technology, how to take advantage of the opportunities presented, and improve the overall performance of your IT investment. Learn from real-time demonstrations of practical applications of the latest tools.	Two Segments Nov-21 & Nov-22	9am-12:30pm	Live Webinar

Seminar Schedule | PD Passports | Nexus Days | Executive Programs | Certificate Programs

Technology Update Are you ready to learn about the latest trends in technology? Do you sometimes feel lost in the technology jungle? Would you like clear guidance regarding Windows, Office, the Cloud, security, and other technology-related issues? This fast-paced and highly informative seminar is sure to ramp up your return on technology investment.	Oct-18 Dec-13 Mar-12	1:30pm-5pm 9am-12:30pm 9am-12:30pm	Live Webinar Live Webinar Live Webinar

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

SOFTWARE & TOOLS

Advanced Excel For experienced Excel users seeking to elevate your skills, this seminar will provide critical advanced Excel skills in six key areas: collaborating 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.	Two Segments Oct-26 & Oct-27 Feb-08 & Feb-09	 9am-12:30pm 9am-12:30pm	 Live Webinar Live Webinar
Advanced Excel Analysis – Part 1: Dimensional Modeling in Power Pivot The capabilities of Power Pivot are amazing, but they require a sound understanding of a concept called “dimensional modeling” in order to get started. Explore what this means, how to design your tables properly as well as link them together in the correct way. Learn the right way to set up your dimensional model in order to make the next stage – writing DAX formulas – easy.	Nov-14	9am-5pm	Live Webinar

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

ETHICS

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

PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT
- Communication & Negotiation
- Creative Thinking & Decision Making
- Self-Management & Wellness
- Teamwork & Leadership

PUBLIC PRACTICE MANAGEMENT

STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE
- Risk Management & Fraud
- Strategy, Governance & Human Resource

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

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

WEALTH MANAGEMENT

PD NEXUS DAYS

Advanced Excel Analysis – Part 2: DAX Formulas in Power Pivot Up your DAX game so that you can make your PivotTables show the exact aggregations you need. From creating simple measures to controlling percent of grand totals which don't lose their context upon filtering, to advanced patterns to control date period intelligence, we'll cover it here.	Nov-24	9am-5pm	Live Webinar
Advanced Excel Data Magic - Managing, Analyzing, and Reporting 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. 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. Discover 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.	Two Segments Oct-30 & Oct-31	9am-12:30pm	Live Webinar
An End to Manual Effort in Excel: The Power Query Effect The sad reality is that not all data is stored in nicely curated databases and often – even when it is – the data analyst doesn't have access. Learn how Power Query can clean up, reshape, and combine your data with ease. Converting ASCII files into tables, combining multiple text files in one shot, and even un-pivoting data is not only simple, but an investment in the future, refreshable with a single click when next needed.	Nov-07 Dec-11 Mar-15	9am-5pm 9am-5pm 9am-5pm	Live Webinar Live Webinar Live Webinar

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Budgeting and Forecasting Tools and Techniques Do your budgeting and forecasting processes work as well as they should? Probably not, as many organizations report these activities consume tremendous amounts of time and yield only marginal benefits. Learn to achieve a greater return on your budgeting and forecasting by using various tools and techniques available in today's market. Explore other tools, such as Budget Maestro, PROPHIX, and Host Analytics, and consider how reducing your dependency on Excel can lead to better results. Plus, learn how to account for risk and uncertainty in your budgeting and forecasting models.	Two Segments Feb-15 & Feb-16	9am-12:30pm	Live Webinar
Business Intelligence, Featuring Microsoft's Power BI Tools In today's business climate, business intelligence (BI) is perhaps the hottest topic in most professional circles. Learn how to implement "do it yourself business intelligence" using a variety of techniques and tools, work with some of the advanced data query and summarization features in Excel to create Excel-based dashboards, and leverage that knowledge to build even more powerful BI objects using Microsoft's Power BI tools.	Two Segments Nov-06 & Nov-07	9am-12:30pm	Live Webinar
ChatGPT and Generative Artificial Intelligence for Accountants This seminar is designed to equip you with the skills to leverage the power of AI in the field of accounting. Learn how to use state-of-the-art language models such as ChatGPT to improve data analysis and interpretation, technical proficiency, communication and collaboration, and creative problem-solving. Embrace the power of AI and jumpstart your journey towards becoming a leader in the field.	Nov-01 Feb-15	9am-5pm 9am-5pm	Live Webinar Live Webinar

Creating Vibrant Dashboards Tell a story using effective data visualization tools in Excel with this one-day course. Examine charts, conditional formatting, and other techniques and showcase the results in a dynamic and engaging dashboard.	Nov-21	9am-5pm	Live Webinar
Data Visualization and Mapping Tools for Accountants Gain a concise overview of more than 200 data visualization tools which can be used by accountants to enhance the visual appeal of their financial work. All resources are easy-to-use web-based applications that require virtually no artistic or design skill – simply drag and drop, point and click, cut and paste, and/or edit text.	Nov-29	9am-12:30pm	Live Webinar
Excel 1: Core Data Analysis This hands-on course is an intensive program that will transform participants into Excel "power users." The course is focused on the pertinent Excel tools that are required in a business environment to efficiently analyze and manipulate data and to create compelling financial analyses. Participants will also learn numerous tips, tricks, and keyboard shortcuts to increase efficiency. Assignments, handouts, and examples will be used throughout the day.	Nov-14	9am-5pm	Live Webinar
Excel 3: Dynamic Dashboards This course provides practical tips and hands-on application to a variety of data management, charting, and formatting skills in an Excel environment. Participants will build a series of charts in order to create a dashboard. A variety of chart types will be explored. Automating titles, creating informative labels and text boxes, and learning best practices for dashboard design and construction will be covered.	Nov-23	9am-5pm	Live Webinar

Excel 365: Advanced Data Analysis Excel 365 recently introduced new features which are the biggest changes to Excel's core functionality in decades. This hands-on course is an intensive session that will teach participants to use new features in Excel 365 to complete analytical work more efficiently and accurately. Participants will also learn how this new functionality can replace or supplement older methods of analysis in Excel. Assignments, handouts, and examples will be used throughout the day.	Nov-07 Mar-05	9am-12:30pm 9am-12:30pm	Live Webinar Live Webinar
Excel Best Practices As spreadsheets evolve, so must your practices for creating, editing, and auditing them. Gain an in-depth understanding of the best ways to work with Excel by learning best practices associated with Excel spreadsheets in each of the following areas: creating and editing Excel workbooks, securing Excel workbooks, collaborating with others in Excel, and reporting on data contained in Excel.	Two Segments Nov-30 & Dec-01	9am-12:30pm	Live Webinar
Excel Boot Camp If you are ready for intensive Excel training, then this course is for you. Using accounting-centric examples, developed for and by accountants, this course takes you through Excel from A to Z and shows you how to take your use of Excel to the next level. In addition to long-standing features in Excel, this seminar will highlight the number of recent improvements to Excel including tables, a vastly improved charting engine, and an overhaul of PivotTable functionality. Learn various techniques to enhance your efficiency and effectiveness when working with Excel.	Four Segments Dec-07, Dec-08, Dec-14 & Dec-15	9am-12:30pm	Live Webinar

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Excel Financial Models and Analysis	Dec-15	9am-5pm	Live Webinar
This hands-on workshop will provide you with the skills to build financial models for use in decision-making, analysis, and forecasting. We'll also work with the many business intelligence (BI) features in Excel for reporting and presentation.	Feb-26	9am-5pm	Live Webinar
Excel: The Next Level of Skills	Oct-26	9am-5pm	Live Webinar
It is time to take your Excel skills to the next level! Discover the best advanced features and functions in Excel to make your accounting and finance tasks easier, faster, and more accurate and increase the complexity of your data analysis and reporting.	Mar-11	9am-5pm	Live Webinar
Google is Not Enough: The Best Search Tools You Aren't Using (But Should!)	Nov-28	9am-5pm	Live Webinar
Attend this course to obtain a concise overview of leading non-Google search tools, and how they can be used by practitioners to sharpen their online intelligence gathering. Attendees will discover a whole new universe of search applications that can be used to discover prime information not found on Google.			

» **READ** instructor Garrett Wasny's article on how CPAs can upgrade their digital skills to stay competitive or listen to his podcast episode.

Health Check for Your Financial Systems & Processes	Nov-08	8:30am-10:30am	Live Webinar
As businesses change and adapt to the new world realities, more pressure is placed on finance and accounting to lower costs, while continuing to meet regulatory reporting requirements and delivering more information for the business to evaluate financial performance. Explore ways to evaluate if your financial systems are meeting you current and future needs and if you have the right resources and practices to manage the demands of your organization.			

Improving Productivity with Microsoft/Office 365 Cloud Applications Many Office 365/Microsoft 365 subscriptions include powerful cloud services for improving productivity. Foundational services, such as SharePoint Online, OneDrive for Business, and Exchange Online, join with other powerful tools such as Teams, Planner, Power Automate, Forms, and Power Apps to provide a productivity platform second to none. Learn about the "rest" of Office 365 and how these cloud-based applications can enhance personal and team productivity, while simultaneously facilitating remote working arrangements.	Nov-14 Mar-07	9am-12:30pm 9am-12:30pm	Live Webinar Live Webinar
Introduction to Excel Macros Designed for those with little, if any, experience working with macros, this course will teach the fundamentals of creating and working with macros in Excel. More specifically, you will learn how to use Excel's Macro Recorder to write simple yet effective macros; how to secure and share macros with other Excel users; how to create user-defined functions to solve specific accountant-centric problems in Excel; and how to create macros that run automatically when a user opens a workbook.	Nov-15	9am-12:30pm	Live Webinar
Mastering Advanced Excel Functions Learn how to use more advanced Excel features to elevate your productivity, and explore newer tools like XLOOKUP, SUMIFS, SWITCH, and STOCKHISTORY. Discuss advanced financial functions, such as IPMT and PPMT, and how to retrieve summarized data easily using GETPIVOTDATA and CUBEVALUE. Additionally, learn how to make sophisticated calculations easier with Dynamic Array formulas, how to harness the AGGREGATE function's power, and create more accurate forecasts with the FORECAST.ETS function.	Oct-24 Feb-13	9am-12:30pm 9am-12:30pm	Live Webinar Live Webinar

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Microsoft Access - Tables, Queries, and Beyond Microsoft Access is an enigma to business professionals, primarily because many try to use Microsoft Office Access as they use Excel. However, the two applications are decidedly different tools. Learn about tables and queries – two cornerstone pieces of databases, how to link data between multiple tables and why your choice matters. Discover how to design and create a complete database, including one with Forms and Reports. If you're serious about using Microsoft Office Access to manage larger volumes of data, this course is for you.	Two Segments Nov-28 & Nov-29	9am-12:30pm	Live Webinar
Rapid Dashboard Development with Power BI Desktop Power BI Desktop allows rapid collection and cleaning of data and creates a relational database of the data on the fly. But the best part is that once this work is done it provides access to compelling dashboards that are attractive, interactive, and best of all, incredibly easy to both build and refresh. Gain an introduction to the five different areas that make up Power BI: Sourcing Data, Modeling Data, Building Formulas, Creating Visualizations and Sharing.	Nov-17 Feb-13	9am-5pm 9am-5pm	Live Webinar Live Webinar
Top PDF Features You Should Know Stop struggling with PDFs! Adobe Acrobat and other PDF tools provide access to features that make working with PDF files a breeze. Learn how to use tools and features such as PDF forms, redaction, converting PDFs to Word and Excel files, and electronic signatures. You will also learn how to create and apply tick marks; build indices, catalogues, and portfolios; and secure PDF documents to their fullest.	Nov-16	9am-12:30pm	Live Webinar

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

VBA Fundamentals – from Zero to Hero This is a two-day, hands-on VBA course that takes someone from no coding experience to understanding VBA fundamentals. Learn the concepts the way an accountant understands them, with examples that are accounting focused.	Two Segments Dec-05 & Dec-08	9am-5pm	Live Webinar

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

WEALTH MANAGEMENT

A Six Point Plan for Financial Freedom Designed for those interested in helping their friends, family, and clients to retire well without having to take risks, this course will detail the non-traditional view of money management that many investment advisors don't want to talk about.	Nov-16 Feb-15 *Available Online On-demand*	9am-5pm 9am-5pm	Live Webinar Live Webinar
Designing Retirement Income In this fast-paced webinar, learn about retirement cash flow considerations on retirement age, CPP, RRIF, income splitting, tax planning, estate factors, insurance, and real estate.	Two Segments Dec-06 & Dec-07	8:30am-12pm	Live Webinar
» **READ** instructor Kurt Rosentreter's article on building an investment portfolio to match life goals.			
Everything You Need to Know about Government, Bank, and Personal Debt This course is on the subject many people don't want to think about: debt. It will delve into all you need to know about the subject from the federal to the provincial level, and will help you understand how debt fuels the world and how you can optimize your personal situation as a result.	Dec-07 *Available Online On-demand*	9am-5pm	Live Webinar
Financial Planning for 30-to-40-Year-Olds For young professionals today, most major life decisions and events often happen between the age of 27 and 35. The course will help you prepare for decisions related to all of the financial issues and strategies typically associated with the first phase of your post-school life. And as you outgrow the advice of parents, this course will prepare you to make independent financial decisions confidently.	Jan-24	8:30am-12pm	Live Webinar

How to Build an Investment Portfolio and Select Investment Products This is an introductory course for individuals looking to learn the basics in a very thorough way. It is a fast-paced session with informative and direct commentary on today's investment landscape in Canada that will teach you a six-step approach to investment portfolio management.	Two Segments Jan-30 & Jan-31	8:30am-12pm	Live Webinar
How to Prepare a Personal Financial Plan Delve into the world of personal financial planning, and learn how to prepare your own financial plan. Explore different planning areas, how to combine them into one overall plan, manage cash flow, determine priorities, decide among trade-offs, and how to update the plan over time.	Two Segments Nov-07 & Nov-08	8:30am-12pm	Live Webinar
Smoke and Mirrors: Financial Myths that will Ruin Your Retirement Dreams There is a lot of confusion when it comes to retirement planning. This course will simplify the process of planning your retirement by pointing out the myths perpetuated by the financial services industry that make them money at your expense.	Dec-14 Mar-14 *Available Online On-demand*	9am-5pm 9am-5pm	Live Webinar Live Webinar
The ABCs of Personal Insurance Everyone loves to hate insurance – yet it is a product in many forms that is essential to protect people and families against catastrophic loss. Discover the essential need-to-know concepts and products in an educational session with no sales pitches. Learn how to determine what amount of insurance you need, the different types of policies that exist, differences in costs and benefits and strategies on how to determine what is suitable for you.	Nov-15	8:30am-12pm	Live Webinar

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

The Procrastinator's Guide to Retirement This course is designed to show you that it is possible to plan for retirement later in life. In fact, if you play your cards right, you can build a significant nest-egg in as little as ten years or less. And don't worry if you are younger, as all the concepts will still be useful to you.	Dec-18 *Available Online On-demand*	9am-5pm	Live Webinar
The Simplest Personal Finance Strategy Ever This course is designed to show you the dangers that exist with a net worth focus. Delve into a much better strategy – The Cash Cow Strategy – that focuses on the cash flow implications of everything you acquire from now on rather than where they go on a net worth statement.	Nov-23 *Available Online On-demand*	9am-5pm	Live Webinar
Unveiling Retirement Myth 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.	Two Segments Nov-07 & Nov-08 Mar-06 & Mar-07	 8:30am-12pm 8:30am-12pm	 Live Webinar Live Webinar

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

PD NEXUS DAYS

Business & Innovation Insights We are undergoing a fourth industrial revolution, and the pace of change has never been faster. In order to stay abreast of change, we must be willing to learn, unlearn, and relearn. The opening plenary, Thinking for a Change, will give you tools to do this efficiently. Three breakout streams will allow you to explore technical topics such as ISSB standards, brush up on technology products, and gain new insights on how to thrive in an era of rapid change. New and expanded networking opportunities will allow you to connect with other attendees and presenters throughout the day.	Dec-13	8:30am-5pm	**Vancouver Convention Centre West, Vancouver**
Local Government Accounting & Auditing Workshop Are you a local government finance professional? Get ready for a forum and workshop to discuss timely issues facing local government entities. The Local Government Accounting & Auditing Workshop is a biennial event presented in partnership with the Government Finance Officers Association of BC (GFOABC).	Nov-23 & Nov-24	8:30am-4:30pm 8:30am-2:30pm	**Coast Coal Harbour, Vancouver**
Estate Planning Insights Designed for estate planning practitioners including professional accountants, lawyers, trust officers, and other financial professionals, this Nexus Day will provide participants with up-to-date, practical, and leading-edge estate planning information, as well as access to highly regarded speakers covering current and relevant estate planning issues.	Oct-12	8:30am-4:30pm	**Hyatt Regency, Vancouver**

» **DIDN'T FIND A SEMINAR?** About our Fall Nexus Days starting on page 119.

PD PASSPORTS 2023-24

Your most economical, cost effective and convenient savings program

Bulk Savings

The more you learn, the more you save

Early Bird Discount

Purchase by **September 15, 2023**

Special Discount

Prices remain 5% lower than pre-pandemic

PASSPORT DAYS → PASSPORT CREDITS = MORE FLEXIBILITY

EXCLUSIVE DISCOUNTING FOR
UP TO 40% OFF SEMINAR PRICES
2023-2024 PASSPORT SEASON

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

CPABC
PD Passports

PD PASSPORTS

Recognizing the importance of continuing professional development even during times of economic rebuilding, PD Passports will continue to be discounted by 5%.

EARLY BIRD DISCOUNT
Sep 15
2023
PURCHASE BY

Personal PD Passport

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

Equivalent to
60 credits of passport-valid
CPABC PD seminars.

*With the additional **5% Special Discount** for this year:*

Early bird price $1,375

Regular price $1,575

60
CREDITS

POTENTIAL SAVINGS

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

Without Personal PD Passport = $2,356

1 Personal PD Passport = $1,375

You could save $981 *or 40% discount*

Flexi PD Passport

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

Equivalent to
60 credits of passport-valid CPABC
Professional Development seminars.

*With the additional **5% Special Discount** for this year:*

Early bird price $1,750

Regular price $1,985

60
CREDITS

POTENTIAL SAVINGS

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

Without Flexi PD Passport = $2,277

1 Flexi PD Passport = $1,750

You could save $527 *or 23% discount*

Mini PD Passport

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

Equivalent to
30 credits of passport-valid
CPABC PD seminars.

*With the additional **5% Special Discount** for this year:*

Early bird price $850

Regular price $950

30
CREDITS

OTENTIAL SAVINGS

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

Without Mini PD Passport = $1,188

1 Mini PD Passport = $850

You could save $338 or *28% discount*

PD Nexus Days for Fall 2023

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

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

CPABC Nexus Days

PD NEXUS DAYS FALL 2023

Estate Planning INSIGHTS

Strategizing for Tomorrow

Oct 12, 2023 | Hyatt Regency Vancouver
PD Passport Valid: 12 Credits | $425

We're happy to announce our bienniel Estate Planning Insights will take place in person, presented jointly with the Society of Trust and Estate Practitioners (STEP) Vancouver Branch.

Designed for estate planning practitioners including professional accountants, lawyers, trust officers, and other financial professionals, this Nexus Day will provide participants with up-to-date, practical, and leading-edge estate planning information, as well as access to highly regarded speakers covering current and relevant estate planning issues.

Join us at the Hyatt Regency Hotel on this information-packed day and connect with other estate planning professionals.

STEP Canada
ADVISING FAMILIES ACROSS GENERATIONS

CPABC
Nexus Days

PD NEXUS DAYS FALL 2023

Local Government Accounting & Auditing WORKSHOP

Nov 23-24, 2023 | Coast Coal Harbour Vancouver
PD Passport Valid: 24 Credits | $795

Don't miss this valuable bienniel workshop, presented jointly with the Government Finance Officers Association of BC (GFOABC), back in-person this year at the Coast Coal Harbour, Vancouver.

This workshop provides a forum for practitioners to discuss the accounting, auditing, reporting, and financing issues facing local governments. Practices within the local government sector are ever-evolving. This workshop offers an opportunity for practitioners and auditors to get up to date on accounting and auditing practices, discuss the issues, and exchange ideas.

Attendees will also have the opportunity to meet and exchange ideas with individuals involved in standard setting.

PD NEXUS DAYS FALL 2023

Business & Innovation INSIGHTS

Moving Forward

Dec 13, 2023 | Vancouver Convention Centre West
PD Passport Valid: 12 Credits | $425

We are back in-person, at the beautiful Vancouver Convention Centre, for a day of learning, inspiration, and connection. This entertaining and insightful day of professional development will help you navigate an exciting, unknown future with confidence.

We are undergoing a fourth industrial revolution, and the pace of change has never been faster. In order to stay abreast of change, we must be willing to learn, unlearn, and relearn. The opening plenary, Thinking for a Change will give you tools to do this efficiently. Three breakout streams will allow you to explore technical topics such as ISSB standards, brush up on technology products, and gain new insights on how to thrive in an era of rapid change. New and expanded networking opportunities will allow you to connect with other attendees and presenters throughout the day.

CPABC
Nexus Days

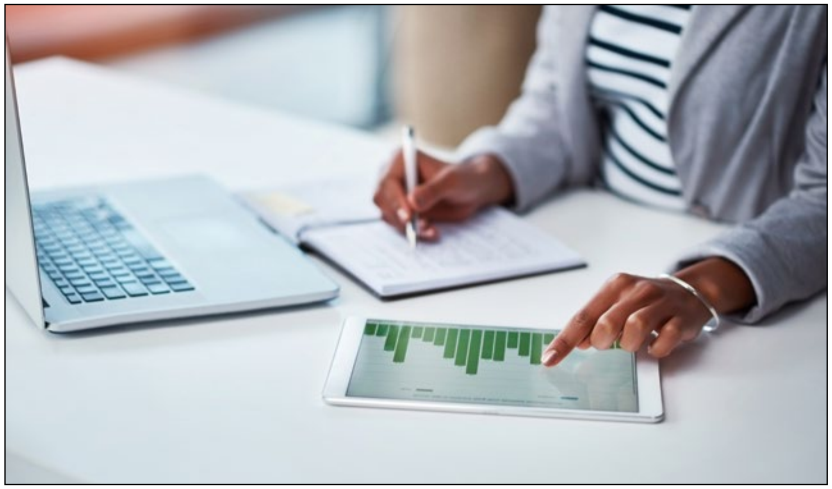
EXECUTIVE PROGRAMS

Forging Ahead

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

Controller's Program

Created with the aspiring and new controller in mind.



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

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

September 20-23
Marriott Inner Harbour, Victoria

December 13-16
Online virtual

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

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

October 15-18
Marriott Inner Harbour, Victoria

CFO Program

Geared towards aspiring and new CFOs.

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

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

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

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

October 15-18
Westin Whistler Resort, Whistler

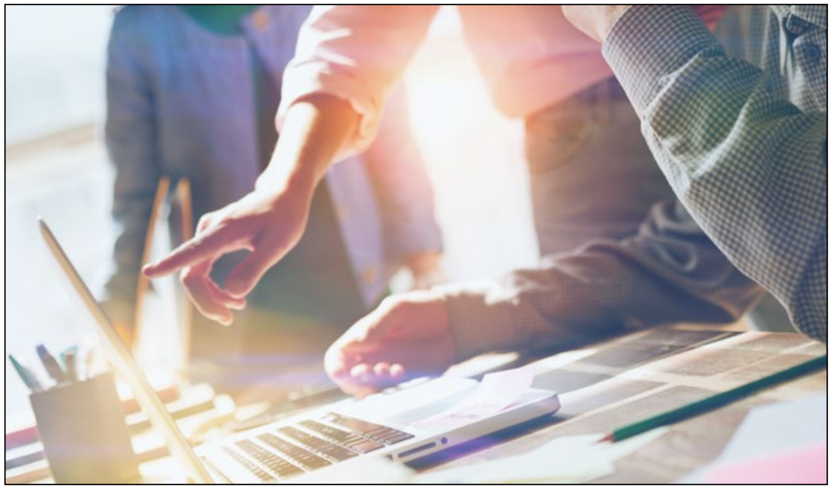
The CFO's Leadership Program focuses on developing the skills needed to be an influential leader in your organization.

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

November 5-8
Westin Whistler Resort, Whistler

CFO as Navigator Program

Geared towards seasoned financial executives.



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

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

September 13-16
In-person, Vancouver

Enterprise Risk Management Fundamentals

Geared towards financial professionals seeking knowledge in risk management.

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

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

November 20-22
Online virtual

Smart Leaders 2025: Building Innovation Capability

Geared towards leaders in positions of executive responsibility.

Smart Leaders 2025 is a stand-alone program for leaders seeking to liberate their genius, to change the way they think, and to strengthen their capabilities as decision makers, risk-takers and innovators to meet the demands of an increasingly volatile and complex business environment.

Objective Innovative companies are built by innovative leaders. In today's unpredictable, hyper-competitive business world, if you're not one then your enterprise is destined to falter. The task of keeping abreast or ahead of competitors has never been more difficult – CEO turnover is increasing in the post-pandemic era as the performance bar is being raised. Owners and boards are now asking whether they have "the right skills" in the C-suite for current marketplace imperatives and, in consequence, the pace of executive transitions is the highest since 2008. The Harvard Business Review reports that "businesses are disappearing faster than ever." Unbridled pride in your thinking and innovation skills may be the road to your own departure.

Organizations live or die on the ability of their leaders to think outside the box, become less risk averse, and better equipped to solve the big issues confronting the enterprise. This unique, time-tested learning experience has been offered to hundreds of executives across the country over the past two decades. It's re-engineered yearly to keep up with the perilous demands they must confront almost daily. The testimonials from prior attendees are all you need to read to understand why this program can expand the competencies required to survive and thrive in an increasingly disruptive business environment. The bottom line: You can't build innovation capacity and transform your company without first transforming yourself.

Thinking differently and more effectively is the key to success in everything you'll ever do. Brainpower isn't the issue – we're born with intelligence. But having it and knowing how to use it are entirely different things. Those who've mastered only one way of thinking, as most executives have by virtue of their particular professional calling, are especially vulnerable to the radically different challenges we face today. To lead in an exponentially changing and error-prone world, we must strengthen our capabilities as risk-takers and innovators. As Steve Jobs once observed, "innovation is what distinguishes a leader from a follower." They must be plugged into the future and know how to reframe old-paradigm strategies into new-world breakthroughs.

We were taught how to be good analytical thinkers but not creative problem solvers. This skill is neither a gift nor a consequence of magical inspiration. It's the mindset of a smart leader. Knowledge confines us to what is; imagination – the brain's navigational system – opens us up to what could be. When you have a bigger and proven toolbox for reframing difficult challenges, you will find better answers. Extraordinary leaders are just ordinary people who can think differently under the incessant pressure of evolving stakeholder expectations. Prior attendees have said unequivocally that this program changed how they lead. Because it changed how they think. It's offered once a year with a limited enrollment – don't be disappointed.

November 7-9, 21-23
Online virtual

Faculty

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

VIJAY FACILITATES
The CFO as Navigator Program

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

LINDA CO-FACILITATES
The Controller's Management Program

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

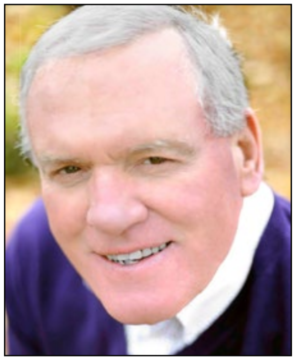
MIA FACILITATES
The Controller's Operational Skills Program

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

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

The CFO's Leadership Program

Faculty



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

JIM FACILITATES

The CEO Program: Acquiring the Edge and Leading with Purpose

Smart Leaders 2025: Thinking and Innovation Skills

The Optimal Negotiator: The Definitive Program for Serious Deal Makers

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

JEFFREY FACILITATES

The CFO's Operational Skills Program

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

TAMMY CO-FACILITATES

The CFO's Leadership Program

WILLIAM (BILL) WESIOLY, CPA, CMA (Ontario), is a risk management consultant and Leadership Coach who enriches the effectiveness of people and organizations through both skill and heart. His background is in the financial services industry, first with BMO and then with RBC. The last 15 years of his banking career was in successfully building and leading risk management programs.

He currently teaches with CPA Ontario and CPAs in other provinces including with CPABC. His consulting assignments over the last few years included organizations in the private, public and nonprofit sectors. He has also recently published a Management Accounting Guideline for CPA Canada – *A Practical Approach for Managing Risks in Small- and Medium-Size Organizations.*

BILL FACILITATES

Enterprise Risk Management Fundamentals

CERTIFICATE PROGRAMS

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

CPABC
Certificate Programs

» **EXCLUSIVE PRICING** Discounted pricing may apply for some programs

NEW Negotiating Mastery

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

- Essential Communication Skills
- Human Behaviour and Cultural Differences
- Power, Creativity and Timing
- Tactic Recognition and Response
- Team Bargaining and Mediation
- The Framework for Negotiating Mastery
- The Negotiating Process Simplified

Each session can be taken as a stand-alone course, but in order to qualify for the certificate, participants are required to complete all seven titles. Titles will be offered across our fall/winter and spring/summer programs.

Why take this program?

Arguably the one skill every accounting professional must master is the ability to get others to agree with him or her. In any undertaking of significance, knowing how to get adversaries to accept your point of view while seeing themselves as winners is crucial to your success and the prosperity of your organization. Nor can you ever expect to ascend the corporate ladder without a solid understanding of fundamental negotiating principles and nuances as well as the ability to emulate those who consistently know how to structure mutually beneficial agreements.

Negotiating is the generic life skill. It's a delicate mix of art and science, of style and substance. It prizes intuition as highly as intellect, common sense as much as achieving the hard numbers. It requires emotional detachment, an understanding of the critical importance of process and a high aspiration level. Many understand the "how to" of deal making intellectually but few are entirely comfortable in their ability to consistently optimize the outcomes. It's a game of power, real as well as imagined. While some play the game masterfully, others only dimly understand it.

Who is this program designed for?

The program is designed for both beginner and advanced deal makers who are seeking to take their game to the next level. It's also purposefully built to accommodate those who seek flexibility in their choice of topics. The target audience for this program are those who are serious about developing their skills beyond mere competence. You'll confront questions about the process you've never thought about before. Yet they're the ones that every accomplished negotiator knows how to answer. If you aspire to negotiating mastery, this certificate program was designed with YOU in mind.

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

NEW Women in Leadership

Beginning this fall, we are re-launching the Women's Leadership Series as the Women in Leadership Certificate Program. This certificate program is focused on development of the skills, knowledge, and connection you need as a woman in the accounting profession to move forward in your career and leadership journey. Each of the seminars below, with the exception of the last one, will be followed by a reflection and connection session.

- Career Navigation for Women Workshop
- High Stress, Low Energy, No Focus (and what to do about it)
- Stop Acting Like a Dude: Professional Presence for 2023
- Develop your Voice and Acumen in Negotiation
- Am I Good Enough?

This is a cohort-based program comprised of PD seminars, and reflection and connection sessions. Participants must complete all the seminars within their cohort, as sessions are designed to build upon each other.

Why take this program?

This program will provide practical training sessions to build your leadership skills and knowledge to support your career. It begins with a half-day Career Navigation for Women Workshop in which you will explore common career success factors for women and create a personal career navigation roadmap.

The learning continues with a series of 90-minute seminars, delivered either weekly or monthly depending on the cohort you select, on topics of importance to your career path and leadership development. In your cohort, you will develop relationships with each other and provide support and peer mentorship throughout your personal journeys. This supported engagement and connection, in addition to the PD seminars, will build on important relationships and delve further into the lessons and learning outcomes of each seminar.

Who is this program designed for?

This program is open to anyone in the CPA profession who identifies as a woman, and is best suited to those in the early to mid points of their careers.

Cohort options

There will be two cohorts available this fall, a compressed offering with weekly sessions running from Sep 12-Nov 28, 2023 and a regular offering with bi-weekly sessions running from Sep 13-Feb 7, 2024.

Please note that you must complete the certificate program within the cohort you register for.

Participants should be prepared to:

- Take space and make space for everyone
- Commit to the whole program and prioritize participation in each session
- Respect everyone's right to privacy and confidentiality
- Contribute thoughtfully and treat everyone with respect
- Promote an open dialogue about diversity, inclusion and equality
- Encourage the appreciation of other's strengths and unique characteristics
- Show interest and demonstrate genuine curiosity to get to know others
- Be open to new ideas and people
- Listen to and value everyone's experience, ideas and opinions

Managing for High Performance

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

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

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

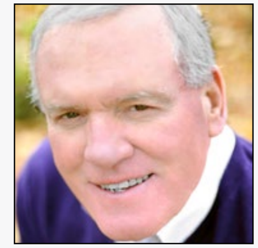
Why take this program?

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

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

Who is this program designed for?

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



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

Virtual Presentation Design and Delivery

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

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

The six modules are:

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

Why take this program?

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

Who is this program designed for?

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

» **LEARN MORE** Watch the video.

CPA Firm Manager Leadership Skills

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

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

The eight modules are:

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

Why take this program?

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

Who is this program designed for?

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

» **LEARN MORE** Watch the video.

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

Strategic Management

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

Why take this program?

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

Who is this program designed for?

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

» **LEARN MORE** Watch the video.

Advanced Strategic Management

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

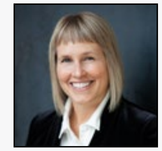
Why take this program?

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

Who is this program designed for?

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

» **LEARN MORE** Watch the video.



MIA MAKI, BA, MBA, FCPA, FCMA is a principal of a consulting firm and a professor with the University of Victoria Gustavson School of Business.

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

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

Resilient Leadership

The five-part Resilient Leadership Certificate modules are:

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

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

Why take this program?

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

Who is this program designed for?

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

» **LEARN MORE** Watch the video.

Advanced Resilient Leadership

A Culture Blueprint for Changing Times

The four-part Advanced Resilient Leadership Certificate modules are:

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

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

Why take this program?

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

Who is this program designed for?

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

» **LEARN MORE** Watch the video.

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

» **LISTEN**
How can you be a resilient leader?

Listen to our podcast with Tammy Robertson.

» **SAVE MORE**
In each of these programs, register for all modules for a reduced price.

Seminar Schedule
PD Passports
Nexus Days
Executive Programs
Certificate Programs

Business Learning Institute (BLI)

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

BLI OFFERINGS

Corporate Finance Institute (CFI)

Archived Webinars

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

CFI OFFERINGS

CPA Crossings

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

CPA Crossings OFFERINGS

ED4S

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

ED4S OFFERINGS

EI Experience

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

EI Experience OFFERINGS

Executive Finance

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

Executive Finance OFFERINGS

Garrett Wasny

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

Garrett Wasny OFFERINGS

FlipU

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

FlipU OFFERINGS

K2E Canada Inc

Technology-Focused Webinars

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

K2E OFFERINGS

LumiQ

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

LumiQ OFFERINGS

Parametric Pro Consulting

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

Parametric Pro OFFERINGS

ProDio Audio Learning Inc

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

Pro Dio OFFERINGS

Sheriff Consulting

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

Sheriff
OFFERINGS

UltimQuest Knowledge

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

UltimQuest Knowledge
OFFERINGS

CPABC PD Video On-Demand

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

PD Video
OFFERINGS

PD AudioWeb

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

PD AudioWeb
OFFERINGS

IN-HOUSE PRESENTATION SERVICES

Making Corporate Training Happen

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

Benefits of Personalized Training

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

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

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

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

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

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

IN-HOUSE PRESENTATION SERVICES

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

98+
sessions offered

2,713+
participants from 33 organizations (industry & public practice)

4.36/5.0
average course rating

300+
seminar titles to select from

Testimonials

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

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

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

Dave Hallinan FCPA, FCMA , City of Kamloops

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

Ilinca Manisali, CPA, CA, Pacific Salmon Commission

CPABC PD Seminars via Zoom Conferencing

Frequently Encountered Issues

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

My video/camera isn't working.

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

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

I can't hear the instructor.

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

I keep hearing an echo.

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

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

I can't see polling questions.

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

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

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

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

How to Use Zoom Features

7 Helpful Tips for Attending Live PD Webinars

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

Learning Management System FAQ

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

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

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

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

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

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

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

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

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

Where do I find the course materials?

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

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

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

Pricing Update

To continue to offer high quality, verifiable PD content and expanded course offerings, effective April 1, 2023 we marginally increased the price of various learning products within your PD Program in line with the rising costs of business. Since 2020, most PD products have been offered at a 20% discount.

The new prices remain below pre-pandemic pricing

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

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

How to Use Zoom Features

How to Annotate on Paperless Material

Registration & Payment

Confirmation of Registration

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

Seminar Venues & Dates

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

Registration Cancellations, Transfers & Refunds

CPABC will continue waiving our $25 and $50 cancellation fee on registrations to CPABC PD seminars held through to March 31, 2024. This only applies to emailed cancellation requests received before 7:00AM two business days prior to the seminar start date. Cancellations will not be accepted after this time, and full course fees, or full passport credits, will apply.

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

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

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

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

Seminar Cancellations by CPABC

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

Seminar Leader Substitution

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

Meals for In-Person Seminars

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

E-Learning and Online On-Demand Seminars

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

Flexi PD Passport Registrations

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

Audio/Video Recording & Photography

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

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

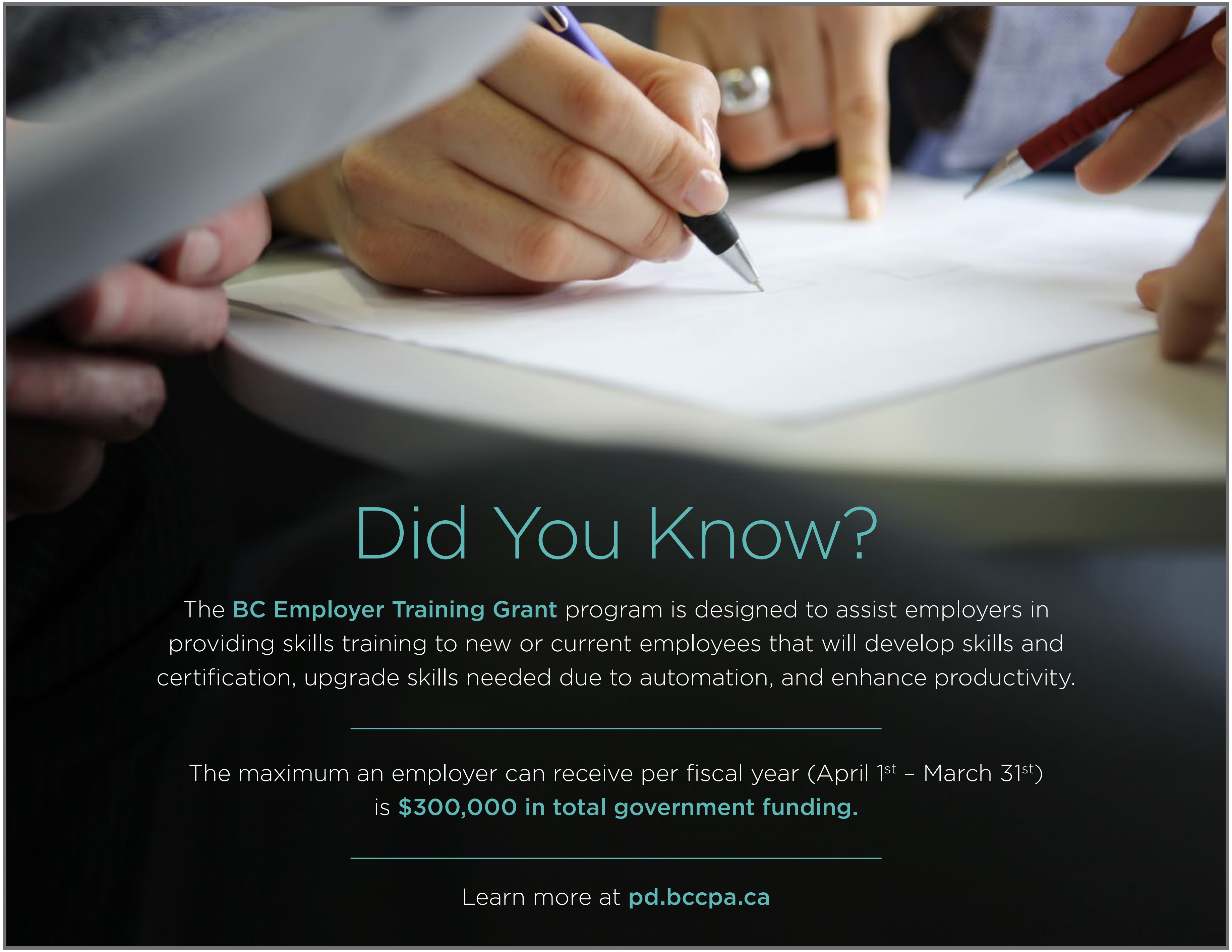
Please note that by registering for CPABC PD seminars, webinars, programs, and on-demand learning, the registrant agrees to:

The Terms & Conditions specified above.

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

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

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


Did You Know?
The BC Employer Training Grant program is designed to assist employers in providing skills training to new or current employees that will develop skills and certification, upgrade skills needed due to automation, and enhance productivity.
The maximum an employer can receive per fiscal year (April 1st – March 31st) is $300,000 in total government funding.
Learn more at pd.bccpa.ca

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