

# Professional Development

**NEW PERSPECTIVES**

## Welcome to the Spring/Summer 2021 CPABC PD Catalogue



Resiliency has been crucial this past year. As CPAs you have had to support the financial health and well-being of your business communities, as you navigate through one of the most interesting, emotional demanding, and yet agile and innovative periods in our collective histories. To help you meet your goals, we are pleased to provide a strong and robust professional development (PD) program that has also been adapting throughout the pandemic to best serve you.

With winter behind us, there's a feeling of renewal, rebirth, and rejuvenation in the air! In keeping with that spirit, we are excited to bring you your Spring/Summer PD program. Current COVID restrictions, will continue to restrict in-person gatherings in the short term. Fortunately, we continue to bring you an online learning program until it is safe to resume more in-person offerings. To those who have already experienced our online PD program, welcome back!

And welcome to those who may be finding yourselves hesitantly coaxed into online learning as the effects of COVID endures. Over the past year, our instructors, authors, and CPABC staff have all grown more seasoned in online learning and we're pleased to bring you a 2.0 learning experience this Spring/Summer.

Part of the 2.0 experience is the launch of a new learning management platform. The new platform will enhance your overall learning experience and ensure you, and our PD program, keeps pace with the digital transformation happening with all organizations and the increasingly digitized mode of interacting we are all doing.

We look forward to connecting with you online this spring/summer and thank you again for choosing CPABC for your learning needs!

Your CPABC Professional Development Team

This spring/summer, make sure to look out for the following **NEW** course titles:

- Employee Delegation and Engagement
- Employee Development: Building Skills, Competence, and Performance
- Ethical Decision Making: Exploring the Hidden Influence of Unconscious Bias in the Conscious Mind
- Excel 365: Advanced Data Analysis
- Financial Planning for 30- to 40-Year Olds
- Microsoft Office 365 - All the Things You Need to Know
- Overcome Self Sabotage with the Neuroscience of Success
- Presenting Like a Pro
- The ABCs of Personal Insurance
- Valuation in Corporate Finance: Five Things to Ask When Valuing an Acquisition

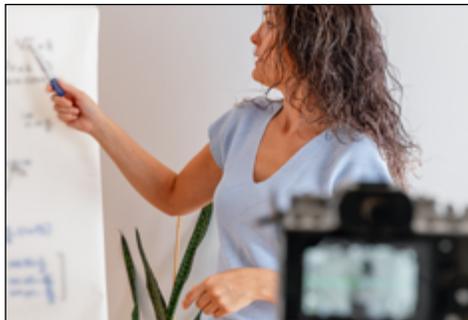
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## **NEW** Seminars for Spring/Summer 2021

Looking for new titles? Don't miss these new seminars in our Spring/Summer professional development program.

### Information & Business Technology

- Excel 365: Advanced Data Analysis
- Microsoft Office 365 - All the Things You Need to Know

### People Management & Personal Development

- Employee Delegation and Engagement
- Employee Development: Building Skills, Competence, and Performance
- Level Up: Public Speaking & Presentation Skills
- Level Up: Better Online Meetings
- Level Up: Writing for Clarity & Impact
- Overcome Self Sabotage with the Neuroscience of Success
- Presenting Like a Pro

### Wealth Management

- The ABCs of Personal Insurance
- Financial Planning for 30-to-40-Year-Olds



## **NEW** Executive Programs

These new programs are scheduled in our Fall program, but make sure you plan ahead and register for them early.

### Smart Leaders

Nov 2-4, 16-18 | Online

Designed for those in positions of executive responsibility, this multi-segment program will provide techniques and insights for changing the way you think and solve problems, and the organization you lead.

### Governing with Intention™

Oct 28-29, Nov 4-5 | Online

Designed for current or incoming directors and professionals seeking leading governance best practices, this program will elevate your skills to navigate the modern boardroom.

#### » READ MORE

For more information on our full line-up of [Executive Programs](#), please see page 55.



## **NEW** Learning Management System for enhanced learning

CPABC PD will be introducing a new Learning Management System (LMS) beginning April 2021. From accessing seminar materials to viewing virtual seminars or recorded videos, through to completing quizzes or downloading course materials, the new LMS will allow members to complete their learning activities more efficiently.

Beginning with our Spring/Summer 2021 program, the LMS will replace CPABC Online Services as the access point to all course materials, live webinars and future live streams, as well as on-demand learning videos and quizzes.

### Benefits to registrants

- Intuitive, visually enhanced and user-friendly interface for navigation and access to courses.
- More seamless learning environment where all learning activities, including partner products, will eventually be accessed from the same location.
- Better live webinar experience where live video presentations and seminar materials will reside within the same location.
- Enhanced on-demand learning with more features like progressive learning and self-tracking, resulting in more structured learning environments.

## Special Pricing on PD Webinars and PD Passports for 2020-2021



To keep PD accessible during these unprecedented times, we are offering a 10% discount on Personal and Flexi Passports for the 2020-2021 year up to August 31, and a 20% discount towards CPABC in-person seminars, live webinars, and selected CPABC archived on-demand products.

**Reminder that 2020-2021 PD Passports expire on August 31, 2021.**

Your current 2020-2021 PD Passports are eligible for CPABC PD seminars scheduled through to August 31, 2021 only.

If you have Passport Credits remaining, the Spring/Summer 2021 PD Program will be your last chance to use up remaining credits. We encourage you to browse our line-up of live seminars – both virtual and in-person, and on-demand learning opportunities, then register early to avoid missing out.

» **READ MORE** For more information on our [PD Passports](#), please see page 52.

## Get ready for more timely and relevant Virtual PD Nexus Days



Don't miss our more-relevant-than-ever [Work Life Balance Insights](#) (July 27) featuring speaker and author Ann Gomez, as she focuses on “The Prioritization Crisis”. For the first time ever, registrants to our popular two-day [Information Technology Insights](#) (August 12-13) will have the opportunity to register for a single-day option or both days; this program continues to deliver so many practical tips, interesting stories from the tech world, and important updates, that we know you'll want to register for both days!

And of course, a season wouldn't be complete without [Business & Leadership Insights](#) (July 7). This summer's offering will feature keynotes from Pierre Cl  roux of BDC on our economic outlook, and Carolyn Stern from the School of Business at Capilano on emotional intelligence for leadership.

» **READ MORE** About our Spring/Summer [Nexus Day](#) offerings on page 54.

## Learning to Improve Learning: Lessons from a year's worth of virtual webinars and looking ahead

One year ago, CPABC's Professional Development needed to convert our seminars to an online platform during the pandemic. Our goals remained the same during the virtual conversion, keeping PD assessable and delivering effective learning for our members' professional development. With a year's experience delivering virtual learning, our the new goal is to continue improving on our PD offerings:

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

### Successful Virtual Learning for 2020



**CPABC PD Live Webinars**  
April-December 2020

**516**

Includes 7 Executive Programs,  
5 Nexus Days, 7 Free Webinars



**Number of Registrations**  
April-December 2020

**16,874**



**Average** course rating

**4.24/5.0**

**Highest** course rating

**4.87/5.0**

We continue to receive encouraging feedback from our attendees - thank you for your support

*"This online experience has been the best I have had in terms of trying to replicate an in-person meeting."*

*"Really loved that there are courses I would have to travel to before and can now take through zoom. Loved the online experience!"*

*"First time using zoom and an online course. It was very easy to navigate, well handled by our facilitator, and time flew by which in my eyes says it was excellent in presentation, breakout group participation and overall content."*

*"I like the wide range of experience you get when people from other areas can easily attend the seminars."*

*"Love the on-line experience. Extremely easy and convenient. Please continue to offer on-line courses even when the pandemic is over."*

### Due to on-going public health and safety restrictions:

- The majority of our Spring/ Summer 2021 seminars will be virtual classes.
- We will offer only a small handful of our live program through limited-seating, in-person seminars until at least the end of August 2021.
- Health and safety guidelines apply to all in-person seminars - registrants must agree to comply with these guidelines before completing their registration.
- Should health authorities once again restrict in-person gatherings, conversion to virtual offering will be made wherever possible

### We've been asking:

"Would you attend more Zoom seminars in the future?"

In our seminar feedback form, **84.2%** of attendees indicated they would.

### Learning to Improve Learning (continued)

#### Encouraging attendee participation and engagement

In an age of teaching and learning behind computer screens, *class engagement* is a recurring concern for both attendees and instructors. This is a component of learning obviously critical in personal development courses, but is no less valuable in technical-focused ones. *Increased interaction* tops the wishlist for all our instructors – active engagement with a participative audience enables them to better gauge their presentation, and create a more effective learning space. So please ask questions, participate in discussions, use Zoom’s non-verbal reaction buttons, or simply say hello during breaks! We also encourage those who can, to turn on their cameras as this also enhances the engagement factor between instructor and attendees.

#### Frequently Encountered Issues

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

#### My video/camera isn’t working.

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

- » FURTHER READING [Zoom Article on video/camera troubleshooting](#); [Windows 10 privacy feature](#); [Using Zoom with Mac OS](#)

#### I can’t hear the instructor.

Did you click on **Join With Computer Audio** when you first joined the meeting? If not, and if that setting is not already your default, click on the arrow next to the microphone icon on the bottom left corner of the meeting screen to select that option. You may also need to check your permissions and

allow Zoom access to your microphone. If you are using iOS or Android, tap on the headphones icon at the bottom left corner, and select either **Call using internet audio** (iOS) or **Call over internet** (Android). It’s also possible that the volume control on your device had previously been turned off or lowered.

#### I keep hearing an echo.

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

- » FURTHER READING [Zoom Article on audio echo in a meeting](#).

#### I can’t see polling questions.

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

- » FURTHER READING [Zoom Article on keeping up to date and how to update your Zoom client](#).

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

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

### 7 Helpful Tips for Attending Live PD Webinars

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

<b>ACCOUNTING &amp; ASSURANCE</b>
<b>Audit &amp; Assurance</b>
Financial Reporting Management Accounting & Financial Management
<b>ETHICS</b>
<b>FINANCE &amp; ECONOMICS</b>
Business Valuation Corporate Finance Financial Modelling
<b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b>
Communication & Negotiation Creative Thinking & Decision Making Self Management & Wellness Teamwork & Leadership Resilient Leadership Certificate Program
<b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b>
Strategy, Governance, & Human Resource Risk Management & Fraud Strategic & Advanced Strategic Management Certificate Programs
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Digital Transformation & Emerging Issues Software & Tools
<b>WEALTH MANAGEMENT</b>
<b>PD NEXUS</b>

## ACCOUNTING & ASSURANCE

### AUDIT & ASSURANCE

<p><b>Audit Engagements - Audit of a Simple Entity</b></p> <p>It can be challenging at times to understand how to apply certain Canadian Auditing Standards to a simple entity in an efficient and effective manner. This seminar will help auditors to better understand and apply Canadian Auditing Standards (CAS) requirements in this context. Key concepts of CAS and their application will be reviewed, taking into consideration unique characteristics of a simple entity.</p>	Jun-10	9am-5pm	Live Webinar
<p><b>Audit Engagements - Review of the Standards</b></p> <p>This seminar provides a solid foundation in the practical application of the Canadian Auditing Standards (CAS) to audit engagements. Using a case study approach, the course reviews key CAS requirements, including the new requirements in CAS 540 – Accounting Estimates and Related Disclosures. This seminar will emphasize areas identified as common pitfalls by CPA national practice inspection findings.</p>	Two-segments Jul-12 & Jul-14	9am-5pm	Live Webinar
<p><b>Compilation Engagements - Application of the New CSRE 4200</b></p> <p>This course will update practitioners on the new standard for compilation engagements (CSRS 4200) so that they will have a working knowledge of the standard for application in their practices. This seminar will include hands-on opportunities to review application of the standard to different scenarios, and comparison to the previous standard and to other non-assurance standards.</p>	May-20 Jun-10 Jun-18 Jul-13 Aug-12	9am-5pm 9am-5pm 9am-5pm 9am-5pm 9am-5pm	Live Webinar Live Webinar Live Webinar Live Webinar Live Webinar

## SEMINAR SCHEDULE CATEGORY & TITLE

ACCOUNTING & ASSURANCE				
<b>Audit &amp; Assurance</b>	<b>Compilation Engagements - Overview of the New Standard (CSRS 4200)</b>	Jun-10 Jul-09	1:30pm-5pm 9am-12:30pm	Live Webinar Live Webinar
Financial Reporting Management Accounting & Financial Management	The new compilation engagement standard, Canadian Standard for Related Services (CSRS) 4200, has some significant differences from the previous standard. This seminar will provide a detailed overview of this new standard and its impact on the planning, implementation, and documentation of a compilation engagement.			
<b>ETHICS</b>				
<b>FINANCE &amp; ECONOMICS</b>	<b>Fraud Happens - What to Do When You Suspect Fraud</b>	Two-segments Jun-22 & Jun-23	9am-12:30pm	Live Webinar
Business Valuation Corporate Finance Financial Modelling	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.			
<b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b>	<b>Review Engagements - Application of the Standard</b>	May-26	8:30am-12:30pm	Live Webinar
Communication & Negotiation Creative Thinking & Decision Making Self Management & Wellness Teamwork & Leadership Resilient Leadership Certificate Program	Using a case study approach, this course allows those already familiar with CSRE 2400: Review Engagements to deepen their knowledge of the standard and its application.			
<b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b>	<b>Review Engagements - Specific Topics</b>	Jun-14	9am-5pm	Live Webinar
Strategy, Governance, & Human Resource Risk Management & Fraud Strategic & Advanced Strategic Management Certificate Programs	There are some areas where the application of CSRE 2400 - Review Engagements can be challenging. This course builds upon fundamental knowledge of the CSRE 2400 - Review Engagements Standards and addresses areas that commonly prove more challenging for practitioners.			
<b>TAXATION</b>				
Corporate & Personal Tax Trusts & Estates				
<b>TECHNOLOGY &amp; INNOVATION</b>				
Digital Transformation & Emerging Issues Software & Tools				
<b>WEALTH MANAGEMENT</b>				
<b>PD NEXUS</b>				

<b>ACCOUNTING &amp; ASSURANCE</b>
Audit & Assurance
<b>Financial Reporting</b>
Management Accounting & Financial Management
<b>ETHICS</b>
<b>FINANCE &amp; ECONOMICS</b>
Business Valuation
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Self Management & Wellness
Teamwork & Leadership
Resilient Leadership Certificate Program
<b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b>
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Strategic & Advanced Strategic Management Certificate Programs
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<b>PD NEXUS</b>

**FINANCIAL REPORTING**

<p><b>ASPE - Comparison to IFRS</b></p> <p>This seminar examines the major differences between Part II - Accounting Standards for Private Enterprises (ASPE) and Part I - International Financial Reporting Standards (IFRS). It will highlight major similarities and significant differences between the two sets of standards.</p>	<p>Two-segments</p> <p>Jun-21 &amp; Jun-22</p> <p>8:30am-12:30pm</p> <p>Live Webinar</p>
<p><b>ASPE - Disclosure and Presentation</b></p> <p>This seminar reviews the realities and best practices for disclosure and presentation requirements of Part II - Accounting Standards for Private Enterprises (ASPE).</p>	<p>Jun-17</p> <p>Jul-19</p> <p>9am-5pm</p> <p>9am-5pm</p> <p>Live Webinar</p> <p>Live Webinar</p>
<p><b>ASPE - Real Estate Industry</b></p> <p>Under Accounting Standards for Private Enterprises (ASPE), real estate entities encounter unique financial reporting issues. This practical seminar will use realistic exercises and examples to illustrate these issues for professionals working in the industry, including both developers and investors.</p>	<p>Two-segments</p> <p>Jun-15 &amp; Jun-16</p> <p>8:30am-12:30pm</p> <p>Live Webinar</p>
<p><b>ASPE - Related Party Transactions</b></p> <p>Accounting for related party transactions is one of the most complicated areas to apply Accounting Standards for Private Enterprises (ASPE) and it is an area of accounting regularly cited for deficiencies by practice inspection. This seminar will address challenges that can arise with respect to the recognition, measurement, presentation, and disclosure of related party transactions and balances under ASPE.</p>	<p>Two-segments</p> <p>Jun-28 &amp; Jun-29</p> <p>8:30am-12:30pm</p> <p>Live Webinar</p>
<p><b>ASPE - Review of the Standards</b></p> <p>This two-day seminar reviews the standards in commonly used sections of Part II - Accounting Standards for Private Enterprises (ASPE), and discusses other aspects of the standard. In addition, this seminar identifies and outlines the accounting policy choices available to management for applying ASPE.</p>	<p>Four-segments</p> <p>Jul-19, Jul-20, Jul-21 &amp; Jul-22</p> <p>8:30am-12:30pm</p> <p>Live Webinar</p>

# SEMINAR SCHEDULE CATEGORY & TITLE

Category	Course Title	Dates	Time	Format
<b>ACCOUNTING &amp; ASSURANCE</b> Audit & Assurance <b>Financial Reporting</b> Management Accounting & Financial Management	<b>Compiling Financial Statements</b> This course explores fundamental accounting concepts, as well as corporate tax concepts, that serve as a background for determining an appropriate basis of accounting for compiling financial statements. This course also serves as an introduction to the financial reporting concepts included in the CPA Handbook – Accounting.	Jun-21	9am-12:30pm	Live Webinar
	<b>IFRS - Disclosure and Presentation</b> This seminar will provide participants with an overview of Part I – International Financial Reporting Standards (IFRS) related specifically to the presentation of all the statements and related note disclosures for all areas.	Four-segments Jun-07, Jun-08, Jun-09 & Jun-10	9am-12:30pm	Live Webinar
<b>ETHICS</b>  <b>FINANCE &amp; ECONOMICS</b> Business Valuation Corporate Finance Financial Modelling	<b>IFRS - Review of the Standards</b> This seminar focuses on general CPA Canada Handbook Public Sector Accounting Standards (PSAS) concepts, the structure of the PSAS Handbook, and differences between PSAS and those of ASPE or IFRS.	Four-segments Jun-21, Jun-22, Jun-23 & Jun-24	9am-12:30pm	Live Webinar
	<b>IFRS 9 - Financial Instruments</b> This course is designed to teach participants the main provisions of the Part I - International Financial Reporting Standards (IFRS) 9, Financial Instruments and provide them with the necessary knowledge to apply it to their own financial instrument fact situation.	Two-segments Aug-05 & Aug-06	8:30am-12:30pm	Live Webinar
<b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b> Communication & Negotiation Creative Thinking & Decision Making Self Management & Wellness Teamwork & Leadership Resilient Leadership Certificate Program	<b>IFRS 16 - Leases</b> IFRS 16 - Leases is now in effect and has significant impact for all companies with leases, particularly operating leases. This seminar provides an in-depth review of the new standard, including the objective and scope of the standard, defined terms, exemptions and transitional requirements.	Two-segments Jul-07 & Jul-08	9am-12:30pm	Live Webinar
	<b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b> Strategy, Governance, & Human Resource Risk Management & Fraud Strategic & Advanced Strategic Management Certificate Programs			
<b>TAXATION</b> Corporate & Personal Tax Trusts & Estates				
<b>TECHNOLOGY &amp; INNOVATION</b> Digital Transformation & Emerging Issues Software & Tools				
<b>WEALTH MANAGEMENT</b>				
<b>PD NEXUS</b>				

# SEMINAR SCHEDULE CATEGORY & TITLE

<b>ACCOUNTING &amp; ASSURANCE</b>	<b>NFPO - Disclosure and Presentation</b>	Two-segments		
Audit & Assurance	This seminar will serve as a review and refresher of the disclosure and presentation requirements of Accounting Standards for Not-for-Profit Organizations (ASNFPO) as well as the most common Accounting Standards for Private Enterprises (ASPE) standard applicable to not-for-profit organizations. Participants will learn what choices are available when setting accounting policies and the impacts on disclosure.	Jun-22 &	9am-12:30pm	Live Webinar
<b>Financial Reporting</b>		Jun-23		
Management Accounting & Financial Management				
<b>ETHICS</b>				
<b>FINANCE &amp; ECONOMICS</b>				
Business Valuation				
Corporate Finance				
Financial Modelling				
<b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b>	<b>NFPO - Review of the Standards</b>	Jun-08	9am-5pm	Live Webinar
Communication & Negotiation	This seminar will discuss the application of NFPO accounting standards, with an emphasis on areas where choice exists in Part III- Accounting Standards for Not-for-Profit Organizations (ASNFPO) and relevant sections of Part II - Accounting Standards for Private Enterprises (ASPE). Participants will learn what choices are available when selecting policies and their impacts on disclosure, and how to determine the appropriate accounting treatment given different facts and scenarios.			
Creative Thinking & Decision Making				
Self Management & Wellness				
Teamwork & Leadership				
Resilient Leadership				
Certificate Program				
<b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b>				
Strategy, Governance, & Human Resource				
Risk Management & Fraud				
Strategic & Advanced Strategic Management				
Certificate Programs				
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<b>WEALTH MANAGEMENT</b>				
<b>PD NEXUS</b>				

ACCOUNTING & ASSURANCE	MANAGEMENT ACCOUNTING & FINANCIAL MANAGEMENT			
Audit & Assurance Financial Reporting	<b>Accelerate and Optimize Financial Close and Spreadsheet Controls</b>	Two-segments Jun-24 & Jun-25	9am-12:30pm	Live Webinar
<b>Management Accounting &amp; Financial Management</b>	Gain a practical understanding of best practices in the financial close processes and learn how to accelerate the financial close process and enhance controls. You will focus on Spreadsheet Controls, which make the whole process of using spreadsheets more effective and efficient and show how to redesign and enhance spreadsheets to reduce the likelihood of error and facilitate the use of spreadsheets as analytical tools.			
ETHICS				
FINANCE & ECONOMICS Business Valuation Corporate Finance Financial Modelling				
PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT Communication & Negotiation Creative Thinking & Decision Making Self Management & Wellness Teamwork & Leadership Resilient Leadership Certificate Program	<b>Advanced Financial Statement Analysis</b>	Jul-19	9am-5pm	Live Webinar
	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.			
STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE Strategy, Governance, & Human Resource Risk Management & Fraud Strategic & Advanced Strategic Management Certificate Programs	<b>Budgeting &amp; Financial Management: Understanding Budgeting Variance Analysis &amp; Forecasting</b>	Two-segments Jul-08 & Jul-09	8:30am-11am 1pm-3:30pm	Live Webinar
	Learn the principles of financial management and how to apply them when making decisions that may affect financial performance. Understand the context within which a budget must be managed in order to meet corporate reporting requirements, and the responsibilities of managing a budget.			
TAXATION Corporate & Personal Tax Trusts & Estates	<b>Costing &amp; Profitability</b>	Jul-16	9am-5pm	Live Webinar
	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.			
TECHNOLOGY & INNOVATION Digital Transformation & Emerging Issues Software & Tools				
WEALTH MANAGEMENT				
PD NEXUS				

# SEMINAR SCHEDULE CATEGORY & TITLE

<b>ACCOUNTING &amp; ASSURANCE</b>	<b>Creating Value Through Budgeting</b>	Jul-22	9am-10:30am	Live Webinar
Audit & Assurance Financial Reporting	Value creation comes from setting a strategic direction and making plans to achieve the goals and objectives set. And in times of uncertainty, where the strategy may flex, often the budget does not. In this session, we discuss how to better integrate budgets using the strategic plan of the organization. We discuss the traditional budget framework and concepts of beyond budgeting that can be integrated as a way to create budgets that are more flexible and realistic.			
<b>Management Accounting &amp; Financial Management</b>				
<b>ETHICS</b>				
<b>FINANCE &amp; ECONOMICS</b> Business Valuation Corporate Finance Financial Modelling				
<b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b> Communication & Negotiation Creative Thinking & Decision Making Self Management & Wellness Teamwork & Leadership Resilient Leadership Certificate Program	<b>Developing Meaningful KPIs</b>	Jul-20	9am-10:30am	Live Webinar
	Organizations understand the importance of using performance measures, however they are often selected based on convenience and accessibility. Walk through the process of setting meaningful key performance indicators using a balanced scorecard approach to ensure that there is strategic alignment.			
<b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b> Strategy, Governance, & Human Resource Risk Management & Fraud Strategic & Advanced Strategic Management Certificate Programs	<b>Essential Topics for Controllers</b>	Two-segments	9am-12:30pm	Live Webinar
	Explore essential areas that you will be expected to be proficient at, or at least have knowledge of, as your career as a Controller progresses. Career-enhancing topics such strategic planning, human resources, negotiating, management vs. leadership, and communication will be de-mystified.	May-26 & May-27		
<b>TAXATION</b> Corporate & Personal Tax Trusts & Estates	<b>Financial Management in the Construction Industry</b>	Two-segments	9am-12:30pm	Live Webinar
	Attain greater knowledge in business systems and financial awareness in the construction industry, from the necessary complexity of the project accounting system, to the broad and integrated spectrum of stakeholders. Explore and be able to confidently address a wide range of topics in these areas.	Jun-23 & Jun-24		
<b>TECHNOLOGY &amp; INNOVATION</b> Digital Transformation & Emerging Issues Software & Tools				
<b>WEALTH MANAGEMENT</b>				
<b>PD NEXUS</b>				

# SEMINAR SCHEDULE CATEGORY & TITLE

<b>ACCOUNTING &amp; ASSURANCE</b>	<b>Internal Controls - Industry Sector</b>	Two-segments		
Audit & Assurance Financial Reporting	An often overlooked concept in accounting, internal controls ensure the integrity and reliability of accounting processes while protecting against fraud and corruption. Accordingly, this seminar provides an overview of the main concepts of internal controls and the associated components, focusing on the COSO framework.	Jun-16 & Jun-17	9am-12:30pm	Live Webinar
<b>Management Accounting &amp; Financial Management</b>	<b>Interpreting Financial Statements</b>	Two-segments		
ETHICS	Strengthen your financial statement analysis capabilities through a hands-on review and interpretation of case studies as well as discussions. Be able to quickly and confidently get to what is happening through the interpretation of financial results, a critical skill in your toolbox.	Jun-14 & Jun-15	9am-12:30pm	Live Webinar
<b>FINANCE &amp; ECONOMICS</b>	<b>Management Accounting - Fundamentals</b>	Two-segments		
Business Valuation Corporate Finance Financial Modelling	Some professional accountants may not have actively used management accounting principles for some time, but management accounting skillsets can be used to address many challenges in today's business environment. This course provides a refresher on key management accounting concepts and tools and how to apply them in your organization.	Jul-14 & Jul-15	9am-12:30pm	Live Webinar
<b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b>	<b>Powerful Financial Analysis</b>	Jul-14	9am-5pm	Live Webinar
Communication & Negotiation Creative Thinking & Decision Making Self Management & Wellness Teamwork & Leadership Resilient Leadership Certificate Program	Acquire key skills that financial analysts need to perform their role effectively within an accounting department. Obtain tools that will assist analysts in furthering their careers, including the abilities to providing meaningful information and influence those around them.			
<b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b>				
Strategy, Governance, & Human Resource Risk Management & Fraud Strategic & Advanced Strategic Management Certificate Programs				
<b>TAXATION</b>				
Corporate & Personal Tax Trusts & Estates				
<b>TECHNOLOGY &amp; INNOVATION</b>				
Digital Transformation & Emerging Issues Software & Tools				
<b>WEALTH MANAGEMENT</b>				
PD NEXUS				

## SEMINAR SCHEDULE CATEGORY & TITLE

ACCOUNTING & ASSURANCE				
Audit & Assurance Financial Reporting				
<b>Management Accounting &amp; Financial Management</b>				
<b>ETHICS</b>				
<b>FINANCE &amp; ECONOMICS</b>				
Business Valuation Corporate Finance Financial Modelling				
<b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b>				
Communication & Negotiation Creative Thinking & Decision Making Self Management & Wellness Teamwork & Leadership Resilient Leadership Certificate Program				
<b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b>				
Strategy, Governance, & Human Resource Risk Management & Fraud Strategic & Advanced Strategic Management Certificate Programs				
<b>TAXATION</b>				
Corporate & Personal Tax Trusts & Estates				
<b>TECHNOLOGY &amp; INNOVATION</b>				
Digital Transformation & Emerging Issues Software & Tools				
<b>WEALTH MANAGEMENT</b>				
<b>PD NEXUS</b>				
	<b>Taking Financial Statement &amp; Ratio Analysis to the Next Level</b>	Jul-12	9am-5pm	Live Webinar
	Explore analyzing financial statements using a few different methods, focusing on ratio analysis and comparisons to industry standards sourced from various software tools, such as Bloomberg. Identify what to look for on financial statements, and discuss other indicators of health for an organization.			

ACCOUNTING & ASSURANCE				
Audit & Assurance				
Financial Reporting				
Management Accounting & Financial Management				
<b>ETHICS</b>				
<b>FINANCE &amp; ECONOMICS</b>				
Business Valuation				
Corporate Finance				
Financial Modelling				
<b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b>				
Communication & Negotiation				
Creative Thinking & Decision Making				
Self Management & Wellness				
Teamwork & Leadership				
Resilient Leadership Certificate Program				
<b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b>				
Strategy, Governance, & Human Resource				
Risk Management & Fraud				
Strategic & Advanced Strategic Management Certificate Programs				
<b>TAXATION</b>				
Corporate & Personal Tax				
Trusts & Estates				
<b>TECHNOLOGY &amp; INNOVATION</b>				
Digital Transformation & Emerging Issues				
Software & Tools				
<b>WEALTH MANAGEMENT</b>				
<b>PD NEXUS</b>				
	<b>ETHICS</b>			
	<b>A Threats and Safeguards Approach to Ethical Decision Making</b>	May-13	8:30am-12:30pm	Live Webinar
		May-19	8:30am-12:30pm	Live Webinar
	Explore situations in your professional roles that involve ethical challenges and examine how these can pose threats to compliance with the Fundamental Principles. Determine how these threats can be mitigated, through examining the CPA Code and relevant safeguards.	Jun-05	8:30am-12:30pm	Live Webinar
		Jun-14	8:30am-12:30pm	Live Webinar
		Jun-22	8:30am-12:30pm	In-Person, Vancouver
		Jun-29	8:30am-12:30pm	Live Webinar
		Jul-08	8:30am-12:30pm	Live Webinar
		Jul-13	8:30am-12:30pm	Live Webinar
		Jul-17	8:30am-12:30pm	Live Webinar
	<b>Becoming an Ethical Leader</b>	Jun-18	8:30am-12:30pm	Live Webinar
	Explore the critical role that ethical leadership contributes to organizations with interactive group discussions that are based on real life challenges leaders may face.	Aug-17	8:30am-12:30pm	Live Webinar
	<b>Business Ethics: It Starts with You</b>	May-25	8:30am-12:30pm	Live Webinar
	Understand and manage ethical issues in your everyday business setting. Explore how both personal and business values influence business decisions through dynamic group discussions.	Jun-24	8:30am-12:30pm	Live Webinar
		Jul-15	8:30am-12:30pm	In-Person, Vancouver
		Aug-05	8:30am-12:30pm	In-Person, Vancouver
	<b>NEW Ethical Decision Making: Exploring the Hidden Influence of Unconscious Bias in the Conscious Mind</b>	Jul-06	8:30am-12:30pm	Live Webinar
	How can we better understand the hidden biases that underlie our decisions, shape our perspectives, and influence our personal interactions? In this session we will consider the drivers of unconscious bias and the impact on organizational decision making. We will explore how best to identify and mitigate the risks of unconscious bias in the workplace, to build more innovative, inclusive, and ultimately successful organizations.	Aug-18	8:30am-12:30pm	Live Webinar

## SEMINAR SCHEDULE CATEGORY & TITLE

<b>ACCOUNTING &amp; ASSURANCE</b> Audit & Assurance Financial Reporting Management Accounting & Financial Management	<b>Ethical Leadership in an Age of AI</b> Advancements in artificial intelligence (AI) raise unique ethical challenges for business leaders. Participants will collaborate to evaluate a variety of ethical situations and explore the implications of AI technologies on the role of an ethical leader in the context of the CPA Code.	Jun-04 Aug-11	8:30am-12:30pm 8:30am-12:30pm	Live Webinar Live Webinar
	<b>Ethical Tax</b> Tax is seldom black or white. In this interactive session, case studies will be used to provoke discussion on ethical dilemmas related to tax matters confronting accountants.	Jun-15	8:30am-10:30am	Live Webinar
<b>ETHICS</b>	<b>Ethics and Technology</b> Uncover ethical considerations and outcomes related to technology. Explore “technoethics”, and the implications this has on individuals and organizations, in issues such as copyrights, cybercrimes, and geo-tracking technologies.	Jul-12 Aug-17	8:30am-12:30pm 8:30am-12:30pm	Live Webinar Live Webinar
	<b>Ethics at Our Core</b> Refresh your knowledge on the CPA Code of Professional Conduct and apply the code to resolve several interactive case studies and realistic situations.	Jun-10 Jul-12 Jul-27	8:30am-12:30pm 8:30am-12:30pm 8:30am-12:30pm	Live Webinar Live Webinar In-Person, Vancouver
<b>FINANCE &amp; ECONOMICS</b> Business Valuation Corporate Finance Financial Modelling	<b>Setting the Tone: It Only Starts at the Top</b> Get to the root causes of ethical lapses. Learn what the attributes of an ethical culture are, how to evaluate the organization’s ethical climate, and the role leaders play in promoting that climate.	Jul-21	9am-10:30am	Live Webinar
	<b>Shades of Grey: Ethics in the Workplace</b> Enhance your understanding of professional ethics through group case studies on everyday dilemmas and explore moral philosophy in the workplace.	Jun-18 Aug-17	1pm-5pm 1pm-5pm	Live Webinar Live Webinar
<b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b> Communication & Negotiation Creative Thinking & Decision Making Self Management & Wellness Teamwork & Leadership Resilient Leadership Certificate Program	<b>Understanding and Embracing Ethics in the Workplace</b> Learn effective techniques for ethical thinking and how to apply these tools to relevant business-based scenarios.	May-27 Aug-11	8:30am-12:30pm 8:30am-12:30pm	Live Webinar Live Webinar
	<b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b> Strategy, Governance, & Human Resource Risk Management & Fraud Strategic & Advanced Strategic Management Certificate Programs			
<b>TAXATION</b> Corporate & Personal Tax Trusts & Estates				
	<b>TECHNOLOGY &amp; INNOVATION</b> Digital Transformation & Emerging Issues Software & Tools			
<b>WEALTH MANAGEMENT</b>				
	<b>PD NEXUS</b>			

- ACCOUNTING & ASSURANCE
  - Audit & Assurance
  - Financial Reporting
  - Management Accounting & Financial Management
- ETHICS
- FINANCE & ECONOMICS**
  - Business Valuation**
  - Corporate Finance**
  - Financial Modelling
- PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT
  - Communication & Negotiation
  - Creative Thinking & Decision Making
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  - Resilient Leadership Certificate Program
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- TAXATION
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- WEALTH MANAGEMENT
- PD NEXUS

## FINANCE & ECONOMICS

### BUSINESS VALUATION

**Business Valuations - Fundamentals** Jun-04 9am-5pm Live Webinar  
 Aug-12 9am-5pm Live Webinar

Accountants often need basic business valuation knowledge and skills to assist their clients or employers. This full-day seminar provides participants with practical insight into business valuation. Specifically, participants will learn about and apply various valuation tools and approaches to the valuation process.

**Business Valuations - Purchase Price Allocations** Jul-23 9am-5pm Live Webinar

This seminar presents practical strategies for approaching a purchase price allocation (PPA) for financial reporting purposes following a business acquisition or combination.

### CORPORATE FINANCE

**Due Diligence for Acquisitions** Aug-12 9am-5pm Live Webinar

The due diligence process has multiple objectives: deciding whether to proceed, providing a basis for pricing the transaction, and preparing for life after the deal is consummated. In this seminar, participants will deepen their understanding of factors to consider, plan for, and watch for in M&A transactions.

**Financing Strategies** Jun-04 9am-5pm Live Webinar

At some point in their lifecycle, most, if not all, businesses require some type of financing. 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.

# SEMINAR SCHEDULE CATEGORY & TITLE

<p><b>ACCOUNTING &amp; ASSURANCE</b>                  Audit &amp; Assurance                  Financial Reporting                  Management Accounting &amp;                  Financial Management</p> <p><b>ETHICS</b></p>	<p><b>NEW Valuation in Corporate Finance: 5 Things to Ask When Valuing an Acquisition</b>                  Mergers &amp; acquisitions require a lot of due diligence, both qualitatively and quantitatively. From a quantitative perspective, how well is the due diligence typically performed? In this session, we consider what the key questions are when reviewing a valuation to ensure that the right type and amount of due diligence is done.</p>	<p>Aug-10</p>	<p>9am-10:30am</p>	<p>Live Webinar</p>
<p><b>FINANCE &amp; ECONOMICS</b>                  Business Valuation                  Corporate Finance  <b>Financial Modelling</b></p>	<p><b>FINANCIAL MODELLING</b></p>			
<p><b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b>                  Communication &amp; Negotiation                  Creative Thinking &amp; Decision Making                  Self Management &amp; Wellness                  Teamwork &amp; Leadership                  Resilient Leadership                  Certificate Program</p>	<p><b>Building a Model (of a Company)</b>                  This hands-on course focuses on the skills required to design and create an interactive financial model of a company that adheres to the highest industry standards. The course material includes model design, logic, construction, financial concepts and accounting treatment. During the seminar, participants will build a model that includes a forecast of a company’s income statement, cash flow statement and balance sheet.</p>	<p>Two-segments                  Jun-14 &amp;                  Jun 15</p>	<p>9am-12:30pm</p>	<p>Live Webinar</p>
<p><b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b>                  Strategy, Governance, &amp; Human Resource                  Risk Management &amp; Fraud                  Strategic &amp; Advanced Strategic Management                  Certificate Programs</p>	<p><b>Valuation 1: DCF Analysis</b>                  This hands-on course is focused on the practical implementation of a Discounted Cash Flow (“DCF”) valuation analysis. The skills required to build a DCF analysis will be discussed and incorporated into a financial model. Participants will learn to recognize and avoid the most common errors that finance professionals make when creating a DCF analysis. This course will also include a number of Excel tips and skills to help a user check and audit a financial model.</p>	<p>Two-segments                  Aug-25 &amp;                  Aug-26</p>	<p>9am-12:30pm</p>	<p>Live Webinar</p>
<p><b>TAXATION</b>                  Corporate &amp; Personal Tax                  Trusts &amp; Estates</p>				
<p><b>TECHNOLOGY &amp; INNOVATION</b>                  Digital Transformation &amp; Emerging Issues                  Software &amp; Tools</p>				
<p><b>WEALTH MANAGEMENT</b></p>				
<p><b>PD NEXUS</b></p>				

ACCOUNTING & ASSURANCE	<b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b>			
ETHICS	<b>COMMUNICATION &amp; NEGOTIATION</b>			
Audit & Assurance Financial Reporting Management Accounting & Financial Management	<b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b>	<b>Communication &amp; Negotiation</b>	Creative Thinking & Decision Making Self Management & Wellness Teamwork & Leadership Resilient Leadership Certificate Program	Strategy, Governance, RISK & HUMAN RESOURCE Strategy, Governance, & Human Resource Risk Management & Fraud Strategic & Advanced Strategic Management Certificate Programs
Business Valuation Corporate Finance Financial Modelling	<b>Communication &amp; Negotiation</b>	<b>Becoming a Skilled Negotiator</b>	This interactive course will enable finance professionals to reach mutually agreeable business solutions by thinking and acting for the long-term success of negotiated outcomes, and developing communication strategies and other skills that support successful outcomes.	Two-segments Jul-13 & Jul-14 8:30am-11am Live Webinar
Strategic & Advanced Strategic Management Certificate Programs	<b>Communication &amp; Negotiation</b>	<b>Communicating Effectively Under Pressure</b>	Explore situations where you may feel pressure, and learn practical strategies to manage these situations effectively.	Two-segments Jun-21 & Jun-22 9am-12:30pm Live Webinar
Taxation Corporate & Personal Tax Trusts & Estates	<b>Communication &amp; Negotiation</b>	<b>Communicating with Influence</b>	Ever been caught in the communication circle of, “That’s not what I said – that’s not what I meant”? Attend this seminar to learn new skills to clearly and effectively get your message across, and communicate with influence to support your success as a leader and manager.	Two-segments Jun-23 & Jun-24 9am-12:30pm Live Webinar
Technology & Innovation Digital Transformation & Emerging Issues Software & Tools	<b>Communication &amp; Negotiation</b>	<b>Conflict: Changing Viewpoints &amp; Influencing Behaviors</b>	In this highly practical course, learn how to turn conflict into opportunities for problem solving and how to deal effectively with confrontation and criticism. Discover your “hot buttons” and develop self-control.	Three-segments Jul-13, Jul 14 & Jul 15 10am-12:30pm Live Webinar
Wealth Management PD NEXUS	<b>Communication &amp; Negotiation</b>	<b>Dispelling the Myth of “Effective Meetings”: Engaging Virtual Meetings Your Employees Will Want to Attend</b>	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.	Jul-22 9am-12:30pm Live Webinar

## SEMINAR SCHEDULE CATEGORY & TITLE

<p><b>ACCOUNTING &amp; ASSURANCE</b> Audit &amp; Assurance Financial Reporting Management Accounting &amp; Financial Management</p>	<p><b>NEW Level Up: Better Online Meetings</b> Like it or not, virtual meetings are here to stay. Learn how to make the most of online meetings so you can better connect with participants in an engaging, efficient way.</p>	Jun-15	9am-12:30pm	Live Webinar
<p><b>ETHICS</b></p> <p><b>FINANCE &amp; ECONOMICS</b> Business Valuation Corporate Finance Financial Modelling</p>	<p><b>NEW Level Up: Public Speaking and Presentation Skills</b> Whether you dread speaking in front of others or simply know you can do better, this course will provide you with tangible tips and tools you can use to take your public speaking to the next level. From preparation to execution, we will explore ways you can enhance all aspects of your public speaking and presentation skills.</p>	Jun-09	9am-12:30pm	Live Webinar
<p><b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b> <b>Communication &amp; Negotiation</b> Creative Thinking &amp; Decision Making Self Management &amp; Wellness Teamwork &amp; Leadership Resilient Leadership Certificate Program</p>	<p><b>NEW Level Up: Writing for Clarity and Impact</b> From Slack messages to client emails and reports, written communication is everywhere. Is your message landing? In this workshop, you'll learn how to improve your writing by focusing on clarity and impact.</p>	Jun-23	9am-12:30pm	Live Webinar
<p><b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b> Strategy, Governance, &amp; Human Resource Risk Management &amp; Fraud Strategic &amp; Advanced Strategic Management Certificate Programs</p> <p><b>TAXATION</b> Corporate &amp; Personal Tax Trusts &amp; Estates</p>	<p><b>Negotiation Skills</b> The ability to negotiate effectively both internally and externally is a key differentiator for the ability of an individual to contribute to the team. This workshop is based on the four-part model in the world-renowned book Getting to Yes: Negotiating Agreement Without Giving In by Fisher and Ury. The majority of the workshop is spent working on actual negotiations (past, current and future) that the participants face, with a heavy emphasis on practice and coaching by peers and the facilitator.</p>	Two-segments Jul-05 & Jul-06	9am-12:30pm	Live Webinar
<p><b>TECHNOLOGY &amp; INNOVATION</b> Digital Transformation &amp; Emerging Issues Software &amp; Tools</p>		Aug-04 & Aug-05	9am-12:30pm	Live Webinar
<p><b>WEALTH MANAGEMENT</b></p> <p><b>PD NEXUS</b></p>				

# SEMINAR SCHEDULE CATEGORY & TITLE

<p><b>ACCOUNTING &amp; ASSURANCE</b>          Audit &amp; Assurance          Financial Reporting          Management Accounting &amp;          Financial Management</p>	<p><b>NEW Presenting Like a Pro</b>          This program does more than cover the basics of how to present. A strong emphasis is also placed on the “soft” factors that make great presenters, such as authenticity and passion. Theory is introduced in short bursts, and participants spend the majority of time practicing and receiving feedback on their presentation skills. The focus on extensive practice, videotaping and feedback is what makes the program meaningful, and is what makes the learning stick.</p>	<p>Two-segments          Aug-24 &amp;          Aug-25</p>	<p>9am-12:30pm</p>	<p>Live Webinar</p>
<p><b>ETHICS</b></p> <p><b>FINANCE &amp; ECONOMICS</b>          Business Valuation          Corporate Finance          Financial Modelling</p>	<p><b>Principles of Negotiation</b>          In its simplest form, negotiation is the process necessary when we are unable to achieve our objectives single-handedly. Better understanding the drivers, tools and techniques, as well as our own individual strengths and weaknesses, can tremendously impact our effectiveness in achieving outcomes that ensure individual and organizational success in both the short and long term.</p>	<p>Jun-28</p>	<p>9am-12:30pm</p>	<p>Live Webinar</p>
<p><b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b>  <b>Communication &amp; Negotiation</b>  <b>Creative Thinking &amp; Decision Making</b>          Self Management &amp; Wellness          Teamwork &amp; Leadership          Resilient Leadership          Certificate Program</p>	<p><b>Tools for Communicating with Difficult People</b>          Learn how to deal with your reactions to others and self-manage your own. Discover techniques to respectfully but assertively conduct difficult conversations.</p>	<p>Two-segments          Jul-22 &amp;          Jul-23</p>	<p>9am-12:30pm</p>	<p>Live Webinar</p>
<p><b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b>          Strategy, Governance, &amp; Human Resource          Risk Management &amp; Fraud          Strategic &amp; Advanced Strategic Management          Certificate Programs</p>	<p><b>CREATIVE THINKING AND DECISION-MAKING</b>  <b>Setting Concrete Goals and Metrics</b>          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, skill development, and even core values.</p>	<p>Jul-20</p>	<p>9am-12:30pm</p>	<p>Live Webinar</p>
<p><b>TAXATION</b>          Corporate &amp; Personal Tax          Trusts &amp; Estates</p>				
<p><b>TECHNOLOGY &amp; INNOVATION</b>          Digital Transformation &amp; Emerging Issues          Software &amp; Tools</p>				
<p><b>WEALTH MANAGEMENT</b></p>				
<p><b>PD NEXUS</b></p>				

ACCOUNTING & ASSURANCE	SELF MANAGEMENT & WELLNESS			
Audit & Assurance Financial Reporting Management Accounting & Financial Management	<b>A Coach Approach to Conflict and Problem Solving</b> Coaching uses inquiry skills to help people be more aware of their emotions, thinking and behaviours. Coaching is a way of structuring a conversation in a way that helps others take responsibility for their feelings and behaviours, consider other meaningful possibilities, strengthen important relationships and rebuild trust.	Two-segments Jun-22 & Jun-29	9am-12:30pm	Live Webinar
ETHICS				
FINANCE & ECONOMICS Business Valuation Corporate Finance Financial Modelling	<b>Balancing Your Wheels</b> Come and develop a personal “whole life” vision in this course. Learn key optimizers that will help you manage your resiliency and energy for both your personal and professional life.	Two-segments Jun-02 & Jun-09	9am-12:30pm	Live Webinar
<b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b>				
Communication & Negotiation Creative Thinking & Decision Making	<b>Becoming ... what you really want to be</b> This course outlines the path and provides the motivation to follow it. We can all do remarkable things when we acquire the essential tools and understand how to navigate the daunting obstacles life can throw at us. You’ll never look back on your regrets after taking this unique, inspiring learning experience.	Three-segments Aug-17, Aug-18 & Aug-19	10am-12:30pm	Live Webinar
<b>Self Management &amp; Wellness</b> Teamwork & Leadership Resilient Leadership Certificate Program				
STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE Strategy, Governance, & Human Resource Risk Management & Fraud Strategic & Advanced Strategic Management Certificate Programs	<b>Brain Focus: The Power of Full Engagement</b> A full day course packed with strategies to help your productivity and improve your focus to work smarter all day long.	Jun-17	9am-12:30pm	Live Webinar
TAXATION Corporate & Personal Tax Trusts & Estates	<b>Coach Yourself First</b> Gain a deeper understanding of your personal coaching style and its impact on others. Discover the power of personal passion, engagement and purpose to manage yourself, and coach others to be effective coaches.	Jun-23	9am-5pm	Live Webinar
TECHNOLOGY & INNOVATION Digital Transformation & Emerging Issues Software & Tools	<b>Critical Thinking and Self Reflection</b> Designed for leaders who want to develop their critical thinking skills to enhance personal effectiveness, this seminar will diagnose your learning style, introduce critical thinking tools, and help you develop an action plan.	Jun-08 Jul-21	9am-5pm 9am-5pm	Live Webinar Live Webinar
WEALTH MANAGEMENT				
PD NEXUS				

## SEMINAR SCHEDULE CATEGORY & TITLE

<p><b>ACCOUNTING &amp; ASSURANCE</b> Audit &amp; Assurance Financial Reporting Management Accounting &amp; Financial Management</p>	<p><b>Influence and Assertiveness</b> Designed for individuals wishing to develop their influence and assertiveness to increase their impact within their organization, this highly interactive seminar will provide tools and techniques, and will help develop an action plan for the future.</p>	Jul-08	9am-5pm	Live Webinar
<p><b>ETHICS</b></p>	<p><b>Leading Self and Emotional Intelligence</b> Learn how to apply factual thinking to better deal with our emotional triggers and self-limiting beliefs. Discover practical tools that will enable you to build new habits and to relate to others in a more impactful and influential way.</p>	Jun-16	9am-12:30pm	Live Webinar
<p><b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b></p>	<p><b><i>NEW</i> Overcome Self Sabotage with the Neuroscience of Success</b> Do you wonder why you are not achieving bigger goals when you know you have potential? Science reveals that people are subconsciously more afraid of success than they are of failure. Once we reach a level of progress, we trigger self-sabotage and begin to struggle. Help yourself or your team overcome the negative thinking, procrastination, self-doubt and distractions that create stress and busyness without moving forward.</p>	Aug-19	8:30am-12:30pm	Live Webinar
<p><b>Self Management &amp; Wellness</b> Teamwork &amp; Leadership Resilient Leadership Certificate Program</p>	<p><b>Personal Effectiveness: Self Awareness and Balanced Thinking</b> Successful people have one thing in common – they learn by doing and by applying their experience to day to day activities. This one-day highly interactive course identifies the links between our self-understanding, personal growth, communication and management styles, and critical thinking, both in our working and personal lives.</p>	Jul-14	9am-5pm	Live Webinar
<p><b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b> Strategy, Governance, &amp; Human Resource Risk Management &amp; Fraud Strategic &amp; Advanced Strategic Management Certificate Programs</p>				
<p><b>TAXATION</b> Corporate &amp; Personal Tax Trusts &amp; Estates</p>				
<p><b>TECHNOLOGY &amp; INNOVATION</b> Digital Transformation &amp; Emerging Issues Software &amp; Tools</p>				
<p><b>WEALTH MANAGEMENT</b></p>				
<p><b>PD NEXUS</b></p>				

# SEMINAR SCHEDULE CATEGORY & TITLE

<b>ACCOUNTING &amp; ASSURANCE</b> Audit & Assurance Financial Reporting Management Accounting & Financial Management	<b>Play With Your Mind: Growth Mindset</b> If you have ever said or heard the phrase, “You can’t teach an old dog new tricks” you have just stumbled on to self imposed limitations called a fixed mindset. What we need in our workplaces today are people who continue learning, don’t abdicate their thinking, resist perfectionism, are incessantly curious, willing to speak up, take risks, make mistakes and ruthlessly mine those experiences for learning.	Two-segments Aug-05 & Aug-11	9am-12:30pm	Live Webinar
	<b>ETHICS</b>	<b>Stress Management</b> Gain awareness of the mental chatter that informs our stress levels, evaluate your thinking during times of stress, and then build new ways to respond to stressful situations.	Jul-09	9am-12:30pm
<b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b> Communication & Negotiation Creative Thinking & Decision Making <b>Self Management &amp; Wellness</b> Teamwork & Leadership Resilient Leadership Certificate Program	<b>The Focused CPA - Finding and Maintaining Focus in the Age of Distraction</b> 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 lives.	Two-segments Aug-12 & Aug-19	9am-12:30pm	Live Webinar
	<b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b> Strategy, Governance, & Human Resource Risk Management & Fraud Strategic & Advanced Strategic Management Certificate Programs	<b>The Four Intelligences</b> Using Stephen Covey’s Four Intelligences as a base - intellectual, emotional, physical and spiritual, this session will explore tools and strategies to effectively navigate change, and examine the challenges and opportunities in leading through change.	Jun-22	9am-12:30pm
<b>TAXATION</b> Corporate & Personal Tax Trusts & Estates	<b>Time Management: The Essentials of Productivity Skills</b> Discover a new mind-set and skill-set that will optimize your personal productivity. Learn how to gain and keep control of competing priorities, concurrent projects and critical deadlines in this seminar that focuses on practicality.	Jul-20 Aug-24	9am-5pm 9am-5pm	Live Webinar Live Webinar
<b>TECHNOLOGY &amp; INNOVATION</b> Digital Transformation & Emerging Issues Software & Tools				
<b>WEALTH MANAGEMENT</b>				
<b>PD NEXUS</b>				

# SEMINAR SCHEDULE CATEGORY & TITLE

<p><b>ACCOUNTING &amp; ASSURANCE</b> Audit &amp; Assurance Financial Reporting Management Accounting &amp; Financial Management</p>	<p><b>Transforming the Way You Sell Yourself</b> Learn the skills to sell your expertise with confidence in order to influence decision-makers, board members, and prospective clients or employers.</p>	<p>Two-segments Jul-15 &amp; Jul-16</p>	<p>9am-12:30pm</p>	<p>Live Webinar</p>		
<p><b>ETHICS</b></p>	<p><b>We Have to Talk: Having the Difficult Conversation</b> In a recent Google search, dozens of books on the topic of crucial, fierce, important conversations were found. One common theme emerges from this literature - the fear of difficult conversations is often more stressful than the actual conversation. This workshop places difficult conversations at the core of successful work relationships.</p>	<p>Aug-10</p>	<p>9am-5pm</p>	<p>Live Webinar</p>		
<p><b>FINANCE &amp; ECONOMICS</b> Business Valuation Corporate Finance Financial Modelling</p>	<p><b>What is Your Happiness Practice? It's Time to Ditch the Stress and Find Real Happiness</b> Happiness fuels success not the other way around. So, if your mood needs some elevating, this course outlines the simplest formula for a happy life. It is a comprehensive buffet of practical ideas, suggestions and tools to guide you to a more content, grateful and appreciative way of living. And it will show you how to get more of the satisfaction you are craving.</p>	<p>Two-segments Aug-12 &amp; Aug-17</p>	<p>9am-12:30pm</p>	<p>Live Webinar</p>		
<p><b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b></p>	<p><b>TEAMWORK &amp; LEADERSHIP</b></p>	<p><b>Building High Performance Teams</b> Every business leader knows their workers are their best opportunity for achieving a sustainable competitive advantage. Learn how to genuinely motivate, engage, excite, and keep employees.</p>	<p>Three-segments Jul-27, Jul-28 &amp; Jul-29</p>	<p>10am-12:30pm</p>	<p>Live Webinar</p>	
<p>Communication &amp; Negotiation Creative Thinking &amp; Decision Making</p>	<p><b>Coaching for Executive Excellence</b> Learn effective coaching techniques and best practices, create great coaching relationships, and apply coaching in everyday management situations to empower your team to go beyond their own capacity.</p>	<p>Two-segments May-19 &amp; May-26</p>	<p>9am-12:30pm</p>	<p>Live Webinar</p>		
<p><b>Self Management &amp; Wellness</b> <b>Teamwork &amp; Leadership</b></p>	<p>Resilient Leadership Certificate Program</p>	<p><b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b> Strategy, Governance, &amp; Human Resource Risk Management &amp; Fraud Strategic &amp; Advanced Strategic Management Certificate Programs</p>	<p><b>TAXATION</b> Corporate &amp; Personal Tax Trusts &amp; Estates</p>	<p><b>TECHNOLOGY &amp; INNOVATION</b> Digital Transformation &amp; Emerging Issues Software &amp; Tools</p>	<p><b>WEALTH MANAGEMENT</b></p>	<p>PD NEXUS</p>

## SEMINAR SCHEDULE CATEGORY & TITLE

<p><b>ACCOUNTING &amp; ASSURANCE</b> Audit &amp; Assurance Financial Reporting Management Accounting &amp; Financial Management</p>	<p><b>Creative Leadership: Bringing Innovation to the Workplace</b> Explore the steps you can take to become a creative leader, how to bring greater diversity of thinking into the workplace, create a culture where people aren't afraid of failure, and become a champion for change.</p>	<p>Aug-05</p>	<p>9am-10:30am</p>	<p>Live Webinar</p>
<p><b>ETHICS</b></p> <p><b>FINANCE &amp; ECONOMICS</b> Business Valuation Corporate Finance Financial Modelling</p>	<p><b>Doing Business as Unusual</b> This cutting-edge, counter-intuitive course will enable you to start important conversations about how to fix failing or broken business practices by embracing ideas that run contrary to everything you've ever been taught to do to survive in a volatile, unpredictable world.</p>	<p>Three-segments Aug-10, Aug-11 &amp; Aug-12</p>	<p>10am-12:30pm</p>	<p>Live Webinar</p>
<p><b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b> Communication &amp; Negotiation Creative Thinking &amp; Decision Making Self Management &amp; Wellness</p>	<p><b>Effective &amp; Essential Management Skills</b> This fast-paced and practical learning experience will enhance your tactical managerial and coaching skills. Learn how to drive high degrees of engagement, delegate, empower, and provide meaningful feedback to your team.</p>	<p>Jun-24 Aug-13</p>	<p>9am-5pm 9am-5pm</p>	<p>Live Webinar Live Webinar</p>
<p><b>Teamwork &amp; Leadership</b> Resilient Leadership Certificate Program</p> <p><b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b> Strategy, Governance, &amp; Human Resource Risk Management &amp; Fraud Strategic &amp; Advanced Strategic Management Certificate Programs</p>	<p><b>NEW Employee Delegation, Engagement, and Empowerment</b> Delegation, done well, drives employee engagement, development, performance, and retention. Delegation is also critical to management efficiency and effectiveness: no one can do it all on their own, and poor delegation causes misunderstandings and errors, which take a lot of time to clean up. This practical, hands-on workshop will take you through several important leadership practices to help you delegate more effectively and enhance employee engagement.</p>	<p>Jul-15</p>	<p>9am-12:30pm</p>	<p>Live Webinar</p>
<p><b>TAXATION</b> Corporate &amp; Personal Tax Trusts &amp; Estates</p> <p><b>TECHNOLOGY &amp; INNOVATION</b> Digital Transformation &amp; Emerging Issues Software &amp; Tools</p>	<p><b>NEW Employee Development: Building Skills, Competence, and Performance</b> This practical, hands-on workshop will help you add rigor to your employee development practices. We will explore best practices in development, engagement, and collaboration to help yourself and others develop new skills, unlock their potential, improve performance, and stay in the learning zone for continuous learning and improvement.</p>	<p>Jul-21</p>	<p>9am-12:30pm</p>	<p>Live Webinar</p>
<p><b>WEALTH MANAGEMENT</b></p> <p><b>PD NEXUS</b></p>				

## SEMINAR SCHEDULE CATEGORY & TITLE

<b>ACCOUNTING &amp; ASSURANCE</b> Audit & Assurance Financial Reporting Management Accounting & Financial Management	<b>Empowering and Engaging Others</b> In the current economic climate, and with the growing expectations of increasingly demanding employees, developing the competencies of leaders and managers is key to improving individual, organizational and business performance. This highly interactive course provides leaders and managers with the tools and techniques, confidence and practice, to become highly effective managers.	Jul-07	9am-5pm	Live Webinar
	<b>ETHICS</b>			
<b>FINANCE &amp; ECONOMICS</b> Business Valuation Corporate Finance Financial Modelling	<b>Enhancing Your Influencing Strategies</b> A good leader can be anyone in the organization, and typically, it is someone who has the ability to influence others. Drill down into how to develop effective influencing skills and apply concrete strategies that will enhance those skills.	Jul-06	9am-10:30am	Live Webinar
	<b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b> Communication & Negotiation Creative Thinking & Decision Making Self Management & Wellness			
<b>Teamwork &amp; Leadership</b> Resilient Leadership Certificate Program	<b>Enhancing Your Management Skills</b> This workshop is designed to build leadership and people skills for those who are looking to move into management roles, or managers looking to lead more effectively. Build the skills necessary to understand motivation, prevent micromanagement, and develop engagement.	Jun-17 Aug-19	9am-12:30pm 9am-12:30pm	Live Webinar Live Webinar
	<b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b> Strategy, Governance, & Human Resource Risk Management & Fraud Strategic & Advanced Strategic Management Certificate Programs			
<b>TAXATION</b> Corporate & Personal Tax Trusts & Estates	<b>Improving Collaboration on Remote Teams for Better Teamwork, Engagement and Performance</b> Gain a series of foundational collaboration practices and tools that will help you enhance employee engagement, teamwork, and productivity. We will work on the use of these practices and tools for leading intact teams, team projects, and remote teams.	Jul-13	9am-12:30pm	Live Webinar
	<b>TECHNOLOGY &amp; INNOVATION</b> Digital Transformation & Emerging Issues Software & Tools			
<b>WEALTH MANAGEMENT</b>  <b>PD NEXUS</b>	<b>Influencing Without Authority</b> 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.	Two-segments Jul-14 & Jul-15	9am-12:30pm	Live Webinar

## SEMINAR SCHEDULE CATEGORY & TITLE

<b>ACCOUNTING &amp; ASSURANCE</b> Audit & Assurance Financial Reporting Management Accounting & Financial Management	<b>Leadership and Coaching</b> Equip yourself with the skills to become an effective and respected leader, able to turn compliance into commitment.	May-26	9am-5pm	Live Webinar
	Gain knowledge on strategic and inspirational leadership, shared core values, coaching for growth, and mentoring to enable others to fulfil their potential.	Two-segments Aug-11 & Aug-12	9am-12:30pm	Live Webinar
<b>ETHICS</b>				
<b>FINANCE &amp; ECONOMICS</b> Business Valuation Corporate Finance Financial Modelling	<b>Managing Across Generations</b> In this course, participants gain an appreciation for the preferences, strengths and challenges that members of each generation offer, the values that inform their views and perspective of work and the work-place, the motivations of each generation, and working with practice cases to apply the concepts.	Jun-09	9am-12:30pm	Live Webinar
<b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b> Communication & Negotiation Creative Thinking & Decision Making Self Management & Wellness				
<b>Teamwork &amp; Leadership</b> Resilient Leadership Certificate Program	<b>Managing Change and Transformation</b> Understand and respond to the continual process of business change and transformation. Learn how you can champion change efforts, and manage the process through leadership, perseverance, risk-taking, and the enrolment of others.	Jul-13	9am-5pm	Live Webinar
<b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b> Strategy, Governance, & Human Resource Risk Management & Fraud Strategic & Advanced Strategic Management Certificate Programs	<b>Managing My People</b> Managers find it challenging to maximize their people's contribution to the success of their business. This interactive course will discuss effective ways of working with teams, in order get the best out of each team member.	Two-segments Jul-27 & Jul-28	8:30am-11am	Live Webinar
<b>TAXATION</b> Corporate & Personal Tax Trusts & Estates	<b>Managing Transitions: Leading the People Side of Change</b> Understanding how change affects people is one of the most important factors in successfully implementing changes. This hands-on workshop will furnish you with dozens of practical techniques and tools to help people prepare for, deal, with, and make the most of change.	Jul-14	9am-12:30pm	Live Webinar
<b>TECHNOLOGY &amp; INNOVATION</b> Digital Transformation & Emerging Issues Software & Tools				
<b>WEALTH MANAGEMENT</b>				
<b>PD NEXUS</b>				

## SEMINAR SCHEDULE CATEGORY & TITLE

<b>ACCOUNTING &amp; ASSURANCE</b> Audit & Assurance Financial Reporting Management Accounting & Financial Management	<b>Project Management</b> Learn how to apply foundational project management tools and practices in a way that increases the probability of successful project execution.	Two-segments		
		Jun-22 & Jun-23	9am-12:30pm	Live Webinar
<b>ETHICS</b>	<b>Seven Steps to Successful Virtual Teamwork</b> Working from home and dispersed offices create challenges to the ways we work and communicate. Learn best practices to foster successful teamwork in dispersed work locations by identifying barriers and fostering high-performing behaviours.	Aug-17 & Aug-18	9am-12:30pm	Live Webinar
		Jun-16 & Aug-04	9am-5pm 9am-5pm	Live Webinar Live Webinar
<b>FINANCE &amp; ECONOMICS</b> Business Valuation Corporate Finance Financial Modelling				
<b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b> Communication & Negotiation Creative Thinking & Decision Making Self Management & Wellness				
<b>Teamwork &amp; Leadership</b>				
<b>Resilient Leadership Certificate Program</b>				
<b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b> Strategy, Governance, & Human Resource Risk Management & Fraud Strategic & Advanced Strategic Management Certificate Programs				
<b>TAXATION</b> Corporate & Personal Tax Trusts & Estates				
<b>TECHNOLOGY &amp; INNOVATION</b> Digital Transformation & Emerging Issues Software & Tools				
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<b>PD NEXUS</b>				
<b>RESILIENT LEADERSHIP CERTIFICATE PROGRAM</b>				
	<b>Resilient Leadership - Balance Life, Work and Overwhelm</b> How do you deal with work that never ends? Learn how to set up a routine that is productive, healthy and sustainable. Get beyond “panic working” and look at tools to help you focus, energize, and allocate your time to the things that matter most.	May-26 & Jul-13	1pm-4:30pm 1pm-4:30pm	Live Webinar Live Webinar
	<b>Resilient Leadership - Energize Your Team Through Uncertainty</b> Leading in times of uncertainty is like driving in the fog. Discover how to bring more clarity and focus to your leadership and learn a simple three-part framework to help you lead through uncertainty and strengthen your team for the long haul.	May-31 & Jul-20	9am-12:30pm 9am-12:30pm	Live Webinar Live Webinar
	<b>Resilient Leadership - Five Qualities of a Leader Who Thrives in a Crisis</b> How leaders show up in this moment and what you stand for will be remembered for years to come. Discover the five qualities of a leader including insights and tools to assess and strengthen your ability to, not only survive, but thrive, during a crisis.	Jun-09 & Jul-27	9am-12:30pm 9am-12:30pm	Live Webinar Live Webinar

## SEMINAR SCHEDULE CATEGORY & TITLE

<b>ACCOUNTING &amp; ASSURANCE</b> Audit & Assurance Financial Reporting Management Accounting & Financial Management	<b>Resilient Leadership - Manage Your Mindset and Emotional Well-being</b>	Jun-16 Aug-03	9am-12:30pm 9am-12:30pm	Live Webinar Live Webinar
	Have you considered how you will remain optimistic and hopeful in front of your team and family, no matter what the situation? Dig into the need for leaders to make room for all kinds of emotions. Then learn to lead with strength and compassion while supporting emotional well-being and resilient mindsets.			
<b>ETHICS</b>  <b>FINANCE &amp; ECONOMICS</b> Business Valuation Corporate Finance Financial Modelling	<b>Resilient Leadership - Who's Listening?</b>	Jun-23 Aug-10	9am-12:30pm 9am-12:30pm	Live Webinar Live Webinar
	We're not listening. And no one is listening to us. Yet listening is essential to our times. Change the way you think about communicating with your team, family, and friends, and discover a roadmap on how to listen, and why being a good listener matters so much now.			
<b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b> Communication & Negotiation Creative Thinking & Decision Making Self Management & Wellness Teamwork & Leadership				
<b>Resilient Leadership Certificate Program</b>				
<b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b> Strategy, Governance, & Human Resource Risk Management & Fraud Strategic & Advanced Strategic Management Certificate Programs				
<b>TAXATION</b> Corporate & Personal Tax Trusts & Estates				
<b>TECHNOLOGY &amp; INNOVATION</b> Digital Transformation & Emerging Issues Software & Tools				
<b>WEALTH MANAGEMENT</b>				
<b>PD NEXUS</b>				

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

### STRATEGY, GOVERNANCE, & HUMAN RESOURCE

<p><b>Employment Law &amp; HR Practices</b></p> <p>Gain a practical perspective on the relationship between the legal landscape for (mostly non-union) employment in Canada, and day-to-day human resources activities that impact your organization.</p>	Two-segments May-27 & May-28	9am-12:30pm	Live Webinar
<p><b>Employment Standards Overview</b></p> <p>This seminar provides an overview introduction to key provisions of the BC Employment Standards Act (“ESA”), with emphasis on commonly misunderstood requirements. Participants will have the opportunity to ask real-life questions and will receive a handout summarizing seminar content.</p>	Jul-16	9am-12:30pm	Live Webinar
<p><b>Leading Strategy into Action</b></p> <p>Gain tools and techniques to help communicate the key strategic imperatives of a business, align daily decisions with business strategy, examine the repercussions of failing to follow the strategy, and explore the link between strategy implementation and the success of a business.</p>	Jul-19	9am-5pm	Live Webinar

### RISK MANAGEMENT & FRAUD

<p><b>Understanding the Financial Risk of Employee Benefits</b></p> <p>This seminar will help participants better understand the current reality related to employee benefits, recognize that a “financial storm” is coming around their costs and risks, and develop strategies that are best suited to their own unique needs.</p>	Jun-17	9am-12:30pm	Live Webinar
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**ACCOUNTING & ASSURANCE**  
 Audit & Assurance  
 Financial Reporting  
 Management Accounting & Financial Management

**ETHICS**

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

**PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT**  
 Communication & Negotiation  
 Creative Thinking & Decision Making  
 Self Management & Wellness  
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 Resilient Leadership Certificate Program

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

**Strategic & Advanced Strategic Management Certificate Programs**

**TAXATION**  
 Corporate & Personal Tax  
 Trusts & Estates

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

**WEALTH MANAGEMENT**

**PD NEXUS**

**STRATEGIC & ADVANCED STRATEGIC MANAGEMENT CERTIFICATE PROGRAMS**

<p><b>Strategic Management Certificate: Change Management</b>                  Learn how organizational and human dynamics impact change initiatives, how to plan for change and examine the main ingredients necessary for successful implementation.</p>	Jun-15	9am-5pm	Live Webinar
	Jul-14	9am-5pm	Live Webinar
<p><b>Strategic Management Certificate: Risk Management &amp; Governance</b>                  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.</p>	Jun-22	9am-5pm	Live Webinar
	Jul-21	9am-5pm	Live Webinar
	Aug-19	9am-5pm	Live Webinar
<p><b>Strategic Management Certificate: Strategic Planning</b>                  Examine the link between stated organizational goals, the business environment, and visible strategies, with focus on the functional strategy level. Gain an appreciation of the tools used to develop and execute successful strategies.</p>	May-26	9am-5pm	Live Webinar
	Jun-29	9am-5pm	Live Webinar
	Aug-17	9am-5pm	Live Webinar
<p><b>Strategic Management Certificate: Team Development</b>                  Gain an in-depth understanding of factors impacting team effectiveness, including team design, stages of team development, and ingredients necessary for achieving results.</p>	Jun-08	9am-5pm	Live Webinar
	Jul-20	9am-5pm	Live Webinar

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## TAXATION

### CORPORATE & PERSONAL TAX

<p><b>Advanced Tax Planning Strategies for Business Succession</b></p> <p>This seminar provides a comprehensive review of income tax compliance and planning issues relevant to the preparation of Canadian corporate income tax returns. The focus is on tax planning that is, or can be, implemented during the preparation of tax returns, rather than broader tax planning undertaken on a proactive basis outside of year-end financial statement and tax return preparation.</p>	<p>Jun-23</p>	<p>9am-5pm</p>	<p>Live Webinar</p>
<p><b>Corporate Restructuring - Fundamentals</b></p> <p>This full-day seminar highlights fundamental income tax considerations that arise in corporate reorganizations, including a discussion of related provisions and key pitfalls.</p>	<p>Two-segments Jul-20 &amp; Jul-21</p>	<p>9am-12:30pm</p>	<p>Live Webinar</p>
<p><b>Corporate Tax - Investment Holding Corporations</b></p> <p>The taxation of investment holding corporations has seen a number of significant changes over the past few years. This course will review these and other changes using a number of examples, as well as examine the issue that is now faced by many clients – should I keep or wind up my investment corporation?</p>	<p>Jul-28 Aug-19</p>	<p>9am-12:30pm 9am-12:30pm</p>	<p>Live Webinar Live Webinar</p>
<p><b>Corporate Tax - Purchase and Sale of a Business</b></p> <p>This seminar will provide an understanding and update of Canadian income tax issues for purchasers and vendors of businesses in Canada and their professional tax advisors. The focus of this course will be on transactions between Canadian private business owners and/or their privately-held corporations.</p>	<p>Jul-05</p>	<p>9am-5pm</p>	<p>Live Webinar</p>

# SEMINAR SCHEDULE CATEGORY & TITLE

<p><b>ACCOUNTING &amp; ASSURANCE</b> Audit &amp; Assurance Financial Reporting Management Accounting &amp; Financial Management</p> <p><b>ETHICS</b></p> <p><b>FINANCE &amp; ECONOMICS</b> Business Valuation Corporate Finance Financial Modelling</p> <p><b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b> Communication &amp; Negotiation Creative Thinking &amp; Decision Making Self Management &amp; Wellness Teamwork &amp; Leadership Resilient Leadership Certificate Program</p> <p><b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b> Strategy, Governance, &amp; Human Resource Risk Management &amp; Fraud Strategic &amp; Advanced Strategic Management Certificate Programs</p> <p><b>TAXATION</b></p> <p><b>Corporate &amp; Personal Tax</b> Trusts &amp; Estates</p> <p><b>TECHNOLOGY &amp; INNOVATION</b> Digital Transformation &amp; Emerging Issues Software &amp; Tools</p> <p><b>WEALTH MANAGEMENT</b></p> <p><b>PD NEXUS</b></p>	<p><b>Corporate Tax - RDTOH, CDA and Other Tax Accounts</b> This seminar provides a detailed review of the key tax accounts for private corporations and examines tax planning processes in the case of multiple tax accounts, including GRIP, LRIP, CDA, and the three RDTOH pools.</p>	Jul-13	9am-12:30pm	Live Webinar
	<p><b>Corporate Tax - Review of Tax Planning</b> This two-day seminar provides practitioners with a refresher on technical and tax planning issues for corporations. Although the seminar reviews taxation for public and private corporations, the session primary focuses on the taxation of private companies.</p>	Two-segments Jun-08 & Jun-15	9am-5pm	Live Webinar
	<p><b>Corporate Tax - Shutting Down the Corporation</b> This seminar will focus on the many tax issues that arise, from a compliance and planning perspective, when shutting down a private corporation. Common traps and planning opportunities that arise when shutting down private corporations will also be discussed.</p>	Jul-16	9am-12:30pm	Live Webinar
	<p><b>Corporate Tax - Small Business Deduction and Private Corporate Groups</b> While the small business deduction reduces the amount of income tax for many corporations, the myriad of rules and regulations and recent changes has significantly expanded the complexity. This seminar covers the unique taxation issues that apply to groups of privately held companies and their access to the small business deduction.</p>	Two-segments Jul-08 & Jul-09	9am-12:30pm	Live Webinar
	<p><b>Employing Contractors and Contracting Employees: Sorting Out Tax and Legal Issues</b> This seminar will distinguish between employment and independent contractor relationships and examine the liabilities and advantages of each type of relationship. In addition, the seminar will highlight some of the tax planning opportunities as well as areas of potential concern associated with these relationships.</p>	Jul-06	8:30am-10:30am	Live Webinar

## SEMINAR SCHEDULE CATEGORY & TITLE

<p><b>ACCOUNTING &amp; ASSURANCE</b> Audit &amp; Assurance Financial Reporting Management Accounting &amp; Financial Management</p> <p><b>ETHICS</b></p> <p><b>FINANCE &amp; ECONOMICS</b> Business Valuation Corporate Finance Financial Modelling</p> <p><b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b> Communication &amp; Negotiation Creative Thinking &amp; Decision Making Self Management &amp; Wellness Teamwork &amp; Leadership Resilient Leadership Certificate Program</p> <p><b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b> Strategy, Governance, &amp; Human Resource Risk Management &amp; Fraud Strategic &amp; Advanced Strategic Management Certificate Programs</p> <p><b>TAXATION</b> <b>Corporate &amp; Personal Tax</b> Trusts &amp; Estates</p> <p><b>TECHNOLOGY &amp; INNOVATION</b> Digital Transformation &amp; Emerging Issues Software &amp; Tools</p> <p><b>WEALTH MANAGEMENT</b></p> <p><b>PD NEXUS</b></p>	<p><b>Income Tax - Income Splitting, A New Era</b></p> <p>The Income Tax Act contains several measures related to income splitting; and while some are permissive, most are restrictive. This full-day seminar covers the tax benefits of income splitting, provides a detailed review of relevant income tax legislation, including the expanded TOSI rules, and reviews remaining opportunities to accomplish income splitting.</p>	Jul-07	9am-5pm	Live Webinar
	<p><b>Income Tax - Partnerships</b></p> <p>The taxation of partnerships and their partners is quite different from that of corporations and their shareholders. This course reviews the manner in which partnerships and their partners are taxed, and provides participants with improved understanding of the “what” and “why” issues in preparing returns, to better advise and serve their clients or employers with partnerships.</p>	Jul-09	9am-5pm	Live Webinar
	<p><b>Income Tax - Principal Residences</b></p> <p>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 situations and the unexpected issues or outcomes that can arise in such cases.</p>	May-26	9am-12:30pm	Live Webinar
	<p><b>Income Tax - Real Estate</b></p> <p>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.</p>	Two segments Jun-03 & Jun-04	9am-12:30pm	Live Webinar
		Aug-05	9am-5pm	Live Webinar

## SEMINAR SCHEDULE CATEGORY & TITLE

<b>ACCOUNTING &amp; ASSURANCE</b> Audit & Assurance Financial Reporting Management Accounting & Financial Management	<b>Personal Tax - Review of Tax Planning</b> This two-day seminar in personal tax is designed for those who desire to update and refresh their knowledge in both technical and tax planning issues for individuals, trusts and partnerships, with a primary focus on the taxation of individuals.	Four segments Jul-12, Jul-13, Jul-14 & Jul-15	9am-12:30pm	Live Webinar
	<b>Tax for Controllers</b> Controllers in small to mid-sized private companies have a wide range of responsibilities which can either have an impact on taxation or require tax related reporting. This two-day course is compliance oriented with high level review of a wide range of issues and focus on issue identification.	Four segments Jun-08, Jun-09, Jun-10 & Jun-11	9am-12:30pm	Live Webinar
<b>TRUSTS &amp; ESTATES</b>				
<b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b> Strategy, Governance, & Human Resource Risk Management & Fraud Strategic & Advanced Strategic Management Certificate Programs	<b>Life-Interest Trusts as Will Substitutes</b> This seminar focuses on why and how joint spousal or common-law partner trusts and alter ego trust are commonly used as will substitutes in British Columbia. It will review the requirements imposed by the Income Tax Act for a trust to qualify as an alter ego or a joint spousal or common-law partner trust and the design features of trust agreements for these types of trusts.	Jun-15	9am-12:30pm	Live Webinar
<b>TAXATION</b> <b>Corporate &amp; Personal Tax</b> <b>Trusts &amp; Estates</b>				
<b>TECHNOLOGY &amp; INNOVATION</b> Digital Transformation & Emerging Issues Software & Tools				
<b>WEALTH MANAGEMENT</b>				
<b>PD NEXUS</b>				

- ACCOUNTING & ASSURANCE**
  - Audit & Assurance
  - Financial Reporting
  - Management Accounting & Financial Management
- ETHICS**
- FINANCE & ECONOMICS**
  - Business Valuation
  - Corporate Finance
  - Financial Modelling
- PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT**
  - Communication & Negotiation
  - Creative Thinking & Decision Making
  - Self Management & Wellness
  - Teamwork & Leadership
  - Resilient Leadership Certificate Program
- STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE**
  - Strategy, Governance, & Human Resource
  - Risk Management & Fraud
  - Strategic & Advanced Strategic Management Certificate Programs
- TAXATION**
  - Corporate & Personal Tax
  - Trusts & Estates
- TECHNOLOGY & INNOVATION**
- Digital Transformation & Emerging Issues**
- Software & Tools
- WEALTH MANAGEMENT**
- PD NEXUS**

## TECHNOLOGY & INNOVATION

### DIGITAL TRANSFORMATION & EMERGING ISSUES

<p><b>2021 Technology Update</b></p> <p>Are you ready to learn about the latest trends in technology? Do you sometimes feel lost in the technology jungle? Would you like clear guidance regarding Windows, Office, the Cloud, security, and other technology-related issues? This fast-paced and highly informative seminar is sure to ramp up your return on technology investment.</p>	Jul-13	9am-12:30pm	Live Webinar
<p><b>Blockchain Essentials for CPAs</b></p> <p>This session aims to help participants comprehend what blockchain could mean for the CPA profession. It addresses how blockchain impacts business processes, how to approach risk identification and mitigation in a blockchain environment, and longer-term questions that blockchain raises for the profession.</p>	May-27	1pm-5pm	Live Webinar
<p><b>Cloud Computing</b></p> <p>Learn the fundamentals of cloud computing, the necessary skills to determine if cloud computing might be right for your organization or for your clients, and how to migrate to cloud-based solutions while avoiding major pitfalls along the way.</p>	Jul-08	9am-5pm	Live Webinar
<p><b>Data Analytics and the Future of Finance</b></p> <p>This interactive course addresses the importance of analytics to the future role of finance, the challenges and the opportunities for teams and individuals. It introduces key analytics processes, techniques, tools and application - using examples and case studies, and covers key issues such as data availability, governance, skills required, role of technology vs. people, and the reality of what “Artificial Intelligence” or Machine Learning can or cannot do.</p>	Three-segments Jun-15, Jun-16 & Jun-17	10am-12:30pm	Live Webinar
	Two-segments Aug-12 & Aug-13	8:30am-12:30pm	Live Webinar

# SEMINAR SCHEDULE CATEGORY & TITLE

<p><b>ACCOUNTING &amp; ASSURANCE</b>          Audit &amp; Assurance          Financial Reporting          Management Accounting &amp;          Financial Management</p>	<p><b>Emerging Technologies for Accountants, including Blockchain and Cryptocurrencies</b>          Unlike technologies we use every day, many of the currently emerging technologies have the potential to change how we work in the future. This session will cover an assortment of technologies which are nearing mainstream adoption and help you understand what they do, how they work, as well as some of the potential risks and rewards they offer potential users.</p>	Jul-07	9am-12:30pm	Live Webinar
<p><b>ETHICS</b></p> <p><b>FINANCE &amp; ECONOMICS</b>          Business Valuation          Corporate Finance          Financial Modelling</p>	<p><b>Five Success Strategies for Your Technology Projects</b>          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.</p>	Jul-22	9am-12:30pm	Live Webinar
<p><b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b>          Communication &amp; Negotiation          Creative Thinking &amp; Decision Making          Self Management &amp; Wellness          Teamwork &amp; Leadership          Resilient Leadership          Certificate Program</p>	<p><b>Foundations of Blockchain</b>          Gain a holistic overview of blockchain from a business (non-technical) perspective, including what it is and what it can do, how it is being applied today, and its potential to transform business and industry.</p>	May-27	9am-12:30pm	Live Webinar
<p><b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b>          Strategy, Governance, &amp; Human Resource          Risk Management &amp; Fraud          Strategic &amp; Advanced Strategic Management          Certificate Programs</p>	<p><b>Paperless Office</b>          No one expects a completely paperless office, but reducing the amount of paper used can lead to tremendous rewards. Discover best practices and proven processes for effective document management, and how you can implement simple, inexpensive document management systems at an individual, work group, or small business level.</p>	Two-segments Jul-14 & Jul-15	9am-12:30pm	Live Webinar
<p><b>TAXATION</b>          Corporate &amp; Personal Tax          Trusts &amp; Estates</p>	<p><b>Technology for CPAs - Don't Get Left Behind</b>          Survey today's IT environment, learning about computer hardware, software (including Office 2019), operating systems (including Windows 10) and what they mean for you, and peripheral devices. Learn about significant trends in information technology and how to take advantage of the opportunities presented by these trends. Learn from real-time demonstrations of practical applications of the latest tools which can provide you with knowledge you need to harness the power of technology.</p>	Aug-19	9am-5pm	Live Webinar
<p><b>TECHNOLOGY &amp; INNOVATION</b>  <b>Digital Transformation &amp; Emerging Issues</b>          Software &amp; Tools</p>				
<p><b>WEALTH MANAGEMENT</b></p> <p><b>PD NEXUS</b></p>				

<b>ACCOUNTING &amp; ASSURANCE</b>
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<b>WEALTH MANAGEMENT</b>
PD NEXUS

**SOFTWARE & TOOLS**

<p><b>Advanced Excel</b> For experienced Excel users seeking to elevate your skills, this seminar will provide critical advanced Excel skills in six key areas: collaborating, using tables, external source data, complex formulas, advanced data analysis tools, and visualization techniques.</p>	Two-segments Jun-23 & Jun-24	9am-12:30pm	Live Webinar
<p><b>Advanced Excel Data Magic - Managing, Analyzing and Reporting</b> With tools such as Data Models, Power Query, and Power Pivot, today’s versions of Excel offer unparalleled opportunities to move beyond traditional reporting techniques. If you are interested in advancing your reporting processes and minimizing your dependence on formulas, then this is the one class you cannot afford to miss.</p>	Two-segments Jun-16 & Jun-17	9am-12:30pm	Live Webinar
<p><b>An End to Manual Effort in Excel: The Power Query Effect</b> In this course, you’ll learn how Power Query can clean up, reshape and combine your data with ease. Converting ASCII files into tables, combining multiple text files in one shot and even un-pivoting data is not only simple, but an investment in the future, refreshable with a single click when next needed.</p>	Jun-22	9am-5pm	Live Webinar
<p><b>Best Word, Outlook and PowerPoint Features</b> Most professionals routinely use Word, Outlook, and PowerPoint, but many are self-taught and often use inefficient techniques. If that describes you, then make sure to attend this seminar to learn how you can work much more efficiently when using these tools.</p>	Aug-23	9am-12:30pm	Live Webinar

## SEMINAR SCHEDULE CATEGORY & TITLE

<p><b>ACCOUNTING &amp; ASSURANCE</b> Audit &amp; Assurance Financial Reporting Management Accounting &amp; Financial Management</p> <p><b>ETHICS</b></p> <p><b>FINANCE &amp; ECONOMICS</b> Business Valuation Corporate Finance Financial Modelling</p> <p><b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b> Communication &amp; Negotiation Creative Thinking &amp; Decision Making Self Management &amp; Wellness Teamwork &amp; Leadership Resilient Leadership Certificate Program</p> <p><b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b> Strategy, Governance, &amp; Human Resource Risk Management &amp; Fraud Strategic &amp; Advanced Strategic Management Certificate Programs</p> <p><b>TAXATION</b> Corporate &amp; Personal Tax Trusts &amp; Estates</p> <p><b>TECHNOLOGY &amp; INNOVATION</b> Digital Transformation &amp; Emerging Issues</p> <p><b>Software &amp; Tools</b></p> <p><b>WEALTH MANAGEMENT</b></p> <p><b>PD NEXUS</b></p>	<p><b>Business Intelligence, Featuring Microsoft’s Power BI Tools</b> Learn how to implement “do it yourself business intelligence” using a variety of techniques and tools, such as Excel’s advanced data query and summarization features. Join us for a fast-paced look at how you can take advantage of these fantastic tools to gain greater insights into your data for better decision making.</p>	Jun-22	9am-5pm	Live Webinar
	<p><b>Creating Vibrant Dashboards</b> Tell a story using effective data visualization tools in Excel with this one-day course. Examine charts, conditional formatting, and other techniques and showcase the results in a dynamic and engaging dashboard.</p>	Jul-08	9am-5pm	Live Webinar
	<p><b>DAX Formulas for PowerPivot</b> Up your DAX game so that you can make your PivotTables show the exact aggregations you need. From creating simple measures to controlling percent of grand totals which don’t lose their context upon filtering, to advanced patterns to control date period intelligence, we’ll cover it here.</p>	Jul-21	9am-5pm	Live Webinar
	<p><b>Excel 1: Core Data Analysis</b> This hands-on course is an intensive program that will transform participants into Excel “Power Users”. The course is focused on the pertinent Excel tools that are required in a business environment to efficiently analyze and manipulate data and to create compelling financial analyses. Participants will also learn numerous other tips, tricks and keyboard shortcuts to increase efficiency. Assignments, handouts and examples will be used throughout the day.</p>	Two-segments Jun-08 & Jun-09	9am-12:30pm	Live Webinar
		Aug-23	9am-5pm	Live Webinar

## SEMINAR SCHEDULE CATEGORY & TITLE

Category	Course Title	Date	Time	Format
<b>ACCOUNTING &amp; ASSURANCE</b> Audit & Assurance Financial Reporting Management Accounting & Financial Management	<b>NEW Excel 365: Advanced Data Analysis</b> Excel 365 recently introduced new features which are the biggest changes to Excel's core functionality in decades. This hands-on course is an intensive session that will teach participants to use new features in Excel 365 to complete analytical work more efficiently and accurately. Participants will also learn how this new functionality can replace or supplement older methods of analysis in Excel. Assignments, handouts and examples will be used throughout the day.	Jun-17	9am-12:30pm	Live Webinar
		Aug 27	9am-12:30pm	Live Webinar
<b>ETHICS</b>				
<b>FINANCE &amp; ECONOMICS</b> Business Valuation Corporate Finance Financial Modelling				
<b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b> Communication & Negotiation Creative Thinking & Decision Making Self Management & Wellness Teamwork & Leadership Resilient Leadership Certificate Program	<b>Excel Boot Camp</b> If you are ready for intensive Excel training, then this course is for you. Using accounting-centric examples, developed for and by accountants, this course takes you through Excel from A to Z and shows you how to take your use of Excel to the next level.	Two-segments Jul-16 & Jul-20	9am-5pm	Live Webinar
<b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b> Strategy, Governance, & Human Resource Risk Management & Fraud Strategic & Advanced Strategic Management Certificate Programs	<b>Excel Charting and Visualizations</b> Learn how to create advanced charts that are interactive, dynamic, and aesthetically pleasing – three qualities that will help to ensure that your audience will understand the data you are presenting. Create visualizations that will effectively communicate your data.	Jul-21	9am-12:30pm	Live Webinar
<b>TAXATION</b> Corporate & Personal Tax Trusts & Estates	<b>Excel Financial Models and Analysis</b> This hands-on workshop will provide you with the skills to build financial models for use in decision-making, analysis and forecasting. We'll also work with the many business intelligence (BI) features in Excel for reporting and presentation.	Jun-10	9am-5pm	Live Webinar
<b>TECHNOLOGY &amp; INNOVATION</b> Digital Transformation & Emerging Issues <b>Software &amp; Tools</b>				
<b>WEALTH MANAGEMENT</b>				
<b>PD NEXUS</b>				

## SEMINAR SCHEDULE CATEGORY & TITLE

<b>ACCOUNTING &amp; ASSURANCE</b> Audit & Assurance Financial Reporting Management Accounting & Financial Management	<b>Excel PivotTables for Accountants</b> Learn how to build PivotTables, how to group data inside PivotTables – including grouping options for fiscal periods – and how to create user-defined calculations in your PivotTables. You will also learn advanced PivotTable techniques, including how to build PivotTables that consolidate data from multiple data ranges and PivotTables dynamically connected to external databases and financial accounting systems.	Aug-11	9am-5pm	Live Webinar
<b>ETHICS</b>  <b>FINANCE &amp; ECONOMICS</b> Business Valuation Corporate Finance Financial Modelling	<b>Excel Tips, Tricks and Techniques for Accountants</b> Learn countless tips, tricks, and techniques to improve your general level of productivity, reduce the amount of time you spend on mundane tasks, such as formatting, and customize Excel for greater accuracy and efficiency. You will also learn valuable formula-building skills, best practices for linking Excel data from other worksheets and workbooks, and how to streamline report generation and printing processes.	Aug-12	9am-5pm	Live Webinar
<b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b> Communication & Negotiation Creative Thinking & Decision Making Self Management & Wellness Teamwork & Leadership Resilient Leadership Certificate Program	<b>Excel: Specific Skills for Budgeting, Planning &amp; Forecasting</b> Need help to improve budgeting, planning and forecasting processes in your business? This hands-on workshop will help you apply specific skills in Excel to do just that. Work on data consolidation for budgets, securing workbooks, and forecasting and charting techniques for presenting budgets.	Jul-29	9am-5pm	Live Webinar
<b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b> Strategy, Governance, & Human Resource Risk Management & Fraud Strategic & Advanced Strategic Management Certificate Programs	<b>Excel: The Next Level of Skills</b> It is time to take your Excel skills to the next level! Discover the best advanced features and functions in Excel to make your accounting and finance tasks easier, faster and more accurate, and increase the complexity of your data analysis and reporting.	May-20	9am-5pm	Live Webinar
<b>TAXATION</b> Corporate & Personal Tax Trusts & Estates				
<b>TECHNOLOGY &amp; INNOVATION</b> Digital Transformation & Emerging Issues				
<b>Software &amp; Tools</b>				
<b>WEALTH MANAGEMENT</b>				
<b>PD NEXUS</b>				

## SEMINAR SCHEDULE CATEGORY & TITLE

<b>ACCOUNTING &amp; ASSURANCE</b> Audit & Assurance Financial Reporting Management Accounting & Financial Management	<b>Getting Started with Excel PowerPivot</b> Linking data from multiple sources, while powerful, only scratches the surface of the impact that Power Pivot is making in the business intelligence landscape. Learn the right way to use Power Pivot in this hands-on course developed by a CPA and business intelligence (BI) expert with real-world experience.	Jul-19	9am-5pm	Live Webinar
<b>ETHICS</b>  <b>FINANCE &amp; ECONOMICS</b> Business Valuation Corporate Finance Financial Modelling	<b>Google is Not Enough: The Best Search Tools You Aren't Using (But Should!)</b> Gain a concise overview of non-Google search tools and how they can be used by accountants to scan the 99% of the web that Google can't "see". Discover a whole new universe of tools and content that are largely off the Google radar, and techniques to take you to the next level of online intelligence gathering.	Jul-21	9am-5pm	Live Webinar
<b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b> Communication & Negotiation Creative Thinking & Decision Making Self Management & Wellness Teamwork & Leadership Resilient Leadership Certificate Program	<b>Improving Productivity with Microsoft/Office 365 Cloud Applications</b> 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.	Aug-24	9am-12:30pm	Live Webinar
<b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b> Strategy, Governance, & Human Resource Risk Management & Fraud Strategic & Advanced Strategic Management Certificate Programs				
<b>TAXATION</b> Corporate & Personal Tax Trusts & Estates				
<b>TECHNOLOGY &amp; INNOVATION</b> Digital Transformation & Emerging Issues				
<b>Software &amp; Tools</b>				
<b>WEALTH MANAGEMENT</b>				
<b>PD NEXUS</b>				

## SEMINAR SCHEDULE CATEGORY & TITLE

<p><b>ACCOUNTING &amp; ASSURANCE</b>                      Audit &amp; Assurance                      Financial Reporting                      Management Accounting &amp;                      Financial Management</p>	<p><b>Introduction to Excel Macros</b>                      Designed for those with little, if any, experience working with macros, this course will teach the fundamentals of creating and working with macros in Excel. More specifically, you will learn how to use Excel’s Macro Recorder to write simple, yet effective, macros; how to secure and share macros with other Excel users; how to create user-defined functions to solve specific accountant-centric problems in Excel; and how to create macros that run automatically when a user opens a workbook.</p>	Jun-21	9am-12:30pm	Live Webinar
<p><b>ETHICS</b></p> <p><b>FINANCE &amp; ECONOMICS</b>                      Business Valuation                      Corporate Finance                      Financial Modelling</p>	<p><b>Intro-Mediate Excel Techniques</b>                      Did you know that there are almost always three ways to do everything in Excel? Are you using the most efficient method possible to get things done? This “intro-mediate” Excel course is designed to quickly review the basics, giving you a solid review of techniques that you should know to be efficient, but may have missed in your own education. Once the basics are covered, we’ll also jump into more advanced tools and techniques that you’ll be able to take back to your daily work.</p>	Aug-05	9am-5pm	Live Webinar
<p><b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b>                      Communication &amp; Negotiation                      Creative Thinking &amp; Decision Making                      Self Management &amp; Wellness                      Teamwork &amp; Leadership                      Resilient Leadership                      Certificate Program</p>	<p><b>Mastering Advanced Excel Functions</b>                      Learn about many of Excel’s newer tools, including XLOOKUP, SUMIFS, SWITCH, and STOCKHISTORY, as well as advanced financial functions, such as IPMT and PPMT, and how to retrieve summarized data easily using GETPIVOTDATA and CUBEVALUE. Additionally, learn how to make sophisticated calculations easier with Dynamic Array formulas, how to harness the power of the AGGREGATE function, and how to create more accurate forecasts with Excel’s FORECAST.ETS function.</p>	Aug-18	9am-12:30pm	Live Webinar
<p><b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b>                      Strategy, Governance, &amp; Human Resource                      Risk Management &amp; Fraud                      Strategic &amp; Advanced Strategic Management                      Certificate Programs</p>				
<p><b>TAXATION</b>                      Corporate &amp; Personal Tax                      Trusts &amp; Estates</p>				
<p><b>TECHNOLOGY &amp; INNOVATION</b>                      Digital Transformation &amp; Emerging Issues</p>				
<p><b>Software &amp; Tools</b></p>				
<p><b>WEALTH MANAGEMENT</b></p>				
<p><b>PD NEXUS</b></p>				

## SEMINAR SCHEDULE CATEGORY & TITLE

<p><b>ACCOUNTING &amp; ASSURANCE</b>          Audit &amp; Assurance          Financial Reporting          Management Accounting &amp;          Financial Management</p>	<p><b>NEW Microsoft Office 365 - All the Things You Need to Know</b>          Microsoft Office 365 continues to grow and evolve, yet most Office 365 users are utilizing only a fraction of the tools available in their subscription. Powerful resources such as SharePoint Online and Microsoft Teams can change how your entire organization communicates and collaborates, while more personal apps such as Planner, Flow, and Sway allow individuals to work more efficiently and effectively in virtually all facets of their jobs. Learn the things you need to know to be truly successful with Office 365.</p>	Aug-16	9am-12:30pm	Live Webinar
<p><b>ETHICS</b></p> <p><b>FINANCE &amp; ECONOMICS</b>          Business Valuation          Corporate Finance          Financial Modelling</p>	<p><b>Microsoft Teams</b>          Learn how you can get up and running quickly in Teams so that you can take full advantage of this powerful tool, and critical decisions that will affect your deployment. Also, learn how to work in Teams, including how to take advantage of the chat, voice, and video call services and how to share documents securely with others. Moreover, you will learn how you can extend your Teams platform to external organizations for improved communication and collaboration.</p>	Aug-23	9am-12:30pm	Live Webinar
<p><b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b>          Communication &amp; Negotiation          Creative Thinking &amp; Decision Making          Self Management &amp; Wellness          Teamwork &amp; Leadership          Resilient Leadership          Certificate Program</p>	<p><b>Optimizing Data for Power Pivot Using Power Query</b>          Explore the things you can do to increase your Power Pivot model performance, key factors that affect performance, and how to deal with them. Look at sourcing your data with Power Query, and discover tricks to optimize it for Power Pivot consumption.</p>	Jun-24	9am-5pm	Live Webinar
<p><b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b>          Strategy, Governance, &amp; Human Resource          Risk Management &amp; Fraud          Strategic &amp; Advanced Strategic Management          Certificate Programs</p>	<p><b>Rapid Dashboard Development with Power BI Desktop</b>          Power BI Desktop provides access to compelling dashboards that are attractive, interactive, and best of all, incredibly easy to both build and refresh. This hands-on session will explore sourcing data, data visualization and transformation, data model relationships, DAX measures, interactive visuals, and sharing dashboard solutions.</p>	May-27	9am-5pm	Live Webinar
<p><b>TAXATION</b>          Corporate &amp; Personal Tax          Trusts &amp; Estates</p>				
<p><b>TECHNOLOGY &amp; INNOVATION</b>          Digital Transformation &amp; Emerging Issues</p>				
<p><b>Software &amp; Tools</b></p>				
<p><b>WEALTH MANAGEMENT</b></p>				
<p><b>PD NEXUS</b></p>				

## SEMINAR SCHEDULE CATEGORY & TITLE

<p><b>ACCOUNTING &amp; ASSURANCE</b>          Audit &amp; Assurance          Financial Reporting          Management Accounting &amp;          Financial Management</p>	<p><b>Top PDF Features You Should Know</b>          Learn how to use tools and features to their fullest to optimize your work with PDF documents, including PDF forms, redaction, converting PDFs to Word and Excel files, electronic signatures, creating and applying tick marks, building indices and catalogues, portfolios, and securing PDF documents.</p>	<p>Aug-18</p>	<p>9am-12:30pm</p>	<p>Live Webinar</p>
<p><b>ETHICS</b></p> <p><b>FINANCE &amp; ECONOMICS</b>          Business Valuation          Corporate Finance          Financial Modelling</p>	<p><b>Visual Analytics and Dashboards</b>          Good visualisation and dashboarding is a process that starts with a structured approach to surfacing what users really need, identifying the most relevant data and using the most appropriate visual techniques, structures and 'stories' to support understanding, insights and focus for action. This course will take participants through this process, giving them the skills to create effective visual reports and dashboards in Excel, or to apply the principles and process of design to other visualisation software/ tools.</p>	<p>Four-segments          Jul-19,          Jul 21,          Jul-26 &amp;          Jul-28</p>	<p>8:30am-12:30pm</p>	<p>Live Webinar</p>
<p><b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b>          Communication &amp; Negotiation          Creative Thinking &amp; Decision Making          Self Management &amp; Wellness          Teamwork &amp; Leadership          Resilient Leadership          Certificate Program</p> <p><b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b>          Strategy, Governance, &amp; Human Resource          Risk Management &amp; Fraud          Strategic &amp; Advanced Strategic Management          Certificate Programs</p>				
<p><b>TAXATION</b>          Corporate &amp; Personal Tax          Trusts &amp; Estates</p>				
<p><b>TECHNOLOGY &amp; INNOVATION</b>          Digital Transformation &amp; Emerging Issues</p>				
<p><b>Software &amp; Tools</b></p>				
<p><b>WEALTH MANAGEMENT</b></p>				
<p><b>PD NEXUS</b></p>				

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

**ETHICS**

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

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

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

**TAXATION**  
 Corporate & Personal Tax  
 Trusts & Estates

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

**WEALTH MANAGEMENT**

**PD NEXUS**

**WEALTH MANAGEMENT**

<p><b>A Six Point Plan for Financial Freedom</b>                  Designed for those interested in helping their friends, family, and clients to retire well without having to take risks, this course will detail the non-traditional view of money management that many investment advisors don't want to talk about.</p>	Jul-20	9am-5pm	Live Webinar
<p><b>Designing Retirement Income</b>                  In this fast-paced webinar, learn about retirement cash flow considerations on retirement age, CPP, RRIF, income splitting, tax planning, estate factors, insurance and real estate.</p>	Two-segments Jun-10 & Jun-11	9am-12:30pm	Live Webinar
<p><b>Everything You Need to Know about Government, Bank and Personal Debt</b>                  This course is on the subject many people don't want to think about: debt. It will delve into all you need to know about the subject from the federal to the provincial level, and will help you understand how debt fuels the world and how you can optimize your personal situation as a result.</p>	Jul-27	9am-12:30pm	Live Webinar
<p><b>NEW Financial Planning for 30-to-40-Year-Olds</b>                  For young professionals today, most of the biggest decisions and events in their life happen often between 27 and 35 years old. The course will help you prepare for decisions related to all of the financial issues and strategies typically associated with the first phase of your post school life. And as you outgrow the advice of parents this course will prepare you to make independent financial decisions confidently.</p>	Jun-08	9am-12:30pm	Live Webinar
<p><b>How to Build an Investment Portfolio and Select Investment Products</b>                  This is an introductory course for individuals looking to learn the basics in a very thorough way. It is a fast-paced session with informative and direct commentary on today's investment landscape in Canada that will teach you a six step approach to investment portfolio management.</p>	Two-segments Jun-03 & Jun-04	9am-12:30pm	Live Webinar

## SEMINAR SCHEDULE CATEGORY & TITLE

<p><b>ACCOUNTING &amp; ASSURANCE</b> Audit &amp; Assurance Financial Reporting Management Accounting &amp; Financial Management</p> <p><b>ETHICS</b></p> <p><b>FINANCE &amp; ECONOMICS</b> Business Valuation Corporate Finance Financial Modelling</p> <p><b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b> Communication &amp; Negotiation Creative Thinking &amp; Decision Making Self Management &amp; Wellness Teamwork &amp; Leadership Resilient Leadership Certificate Program</p> <p><b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b> Strategy, Governance, &amp; Human Resource Risk Management &amp; Fraud Strategic &amp; Advanced Strategic Management Certificate Programs</p> <p><b>TAXATION</b> Corporate &amp; Personal Tax Trusts &amp; Estates</p> <p><b>TECHNOLOGY &amp; INNOVATION</b> Digital Transformation &amp; Emerging Issues Software &amp; Tools</p> <p><b>WEALTH MANAGEMENT</b></p> <p>PD NEXUS</p>	<p><b>How to Prepare a Personal Financial Plan</b> Delve into the world of personal financial planning, and learn how to prepare your own financial plan. Explore different planning areas, how to combine them into one overall plan, manage cash flow, determine priorities, decide among trade-offs, and how to update the plan over time.</p>	Two segments May-26 & May-27	9am-12:30pm	Live Webinar
	<p><b>Smoke and Mirrors: Financial Myths that will Ruin Your Retirement Dreams</b> There is a lot of confusion when it comes to retirement planning. This course will simplify the process of planning your retirement by pointing out the myths perpetuated by the financial services industry that make them money at your expense.</p>	Jul-08	9am-5pm	Live Webinar
	<p><b>NEW The ABCs of Personal Insurance</b> Learn the essentials of insurance concepts and products in an educational session with no sales pitches. Find out how to determine what amount of insurance you need, the different types of policies that exist, differences in costs and benefits, and strategies on how to determine what is suitable for you.</p>	May-20	9am-12:30pm	Live Webinar
	<p><b>The Procrastinator's Guide to Retirement</b> This course is designed to show you that it is possible to plan for retirement later in life. In fact, if you play your cards right, you can build a significant nest-egg in as little as ten years or less. And don't worry if you are younger, as all the concepts will still be useful to you.</p>	Aug-17	9am-5pm	Live Webinar
	<p><b>The Simplest Personal Finance Strategy Ever</b> This course is designed to show you the dangers that exist with a net worth focus. Delve into a much better strategy - The Cash Cow Strategy - that focuses on the cash flow implications of everything you acquire from now on rather than where they go on a net worth statement.</p>	Aug-10	9am-5pm	Live Webinar

<p><b>ACCOUNTING &amp; ASSURANCE</b>                  Audit &amp; Assurance                  Financial Reporting                  Management Accounting &amp; Financial Management</p> <p><b>ETHICS</b></p> <p><b>FINANCE &amp; ECONOMICS</b>                  Business Valuation                  Corporate Finance                  Financial Modelling</p> <p><b>PEOPLE MANAGEMENT &amp; PERSONAL DEVELOPMENT</b>                  Communication &amp; Negotiation                  Creative Thinking &amp; Decision Making                  Self Management &amp; Wellness                  Teamwork &amp; Leadership                  Resilient Leadership                  Certificate Program</p> <p><b>STRATEGY, GOVERNANCE, RISK &amp; HUMAN RESOURCE</b>                  Strategy, Governance, &amp; Human Resource                  Risk Management &amp; Fraud                  Strategic &amp; Advanced Strategic Management                  Certificate Programs</p> <p><b>TAXATION</b>                  Corporate &amp; Personal Tax                  Trusts &amp; Estates</p> <p><b>TECHNOLOGY &amp; INNOVATION</b>                  Digital Transformation &amp; Emerging Issues                  Software &amp; Tools</p> <p><b>WEALTH MANAGEMENT</b></p> <p><b>PD NEXUS</b></p>	<p><b>PD Nexus: Business and Leadership Insights</b></p> <p>Our semi-annual PD Nexus: Business Insights Day is a great opportunity to keep up with new developments in the ever-changing business environment. Come to this live virtual event to obtain new skills and knowledge from a wide variety of presentations, including the ever-popular Economic Outlook. Featuring three streams of break-out sessions, you'll find our familiar Tax Update, other technical topics as well as sessions focusing on the challenges and opportunities of leadership and career development. This fast paced day will introduce you to new ideas, expand your knowledge and sharpen your skills as a business leader.</p>	Jul-07	8:30am-4:30pm	Live Webinar
	<p><b>PD Nexus: Work Life Balance Insights</b></p> <p>Life is busy! But that shouldn't keep you from attending this live virtual event where you will learn how to achieve better work-life integration and ultimately, be your best self. In this energizing and empowering day, you will learn strategies and tips for managing your physical, emotional and mental health, as well as tools to increase productivity. Featuring two plenaries and three streams of break-out sessions, you'll learn about eating for health, mindfulness, breaking habits, managing stress and achieving high-performance rest. Get clear on what makes life meaningful, and how to cultivate moments that matter. You will come away with insights on how to get the most out of each day to live your happier, healthier, and more balanced life.</p>	Jul-27	8:30am-4:30pm	Live Webinar
	<p><b>PD Nexus: Information Technology Insights</b></p> <p>PD Nexus: Information Technology Insights 2021 strives to be the touchstone conference-style PD Day for members and organizations who want the best for the customers and clients. Each session – plenaries and breakouts – have been custom tailored to enhance the day-to-day working environment of professional accountants. This PD Nexus Day will benefit accounting professionals who need to keep current with the latest technologies, as well as determine what applications are worth implementing. It will offer practical technology topics designed to help alleviate heavy workloads of today's busy professionals.</p>	Aug-12 & Aug-13	8:30am-4:30pm	Live Webinar

# PD PASSPORTS

Your most economical, cost effective and convenient savings program



## Bulk Savings

The more you learn, the more you save



## Reminder

Use on courses through **August 31, 2021**



## Special Discount

Additional 10% discount on **2020-21 Passports Purchased**

UP TO AUGUST 31, 2021

PASSPORT DAYS → PASSPORT CREDITS = MORE FLEXIBILITY



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



# PD PASSPORTS

Beginning September 2020, the passport measurement unit shifted from “days” to “credits” to help better align passport units to the learning value of in-person and online seminar options. For example, previously most seminars that had a “1 Passport Day” unit are now valued at “10 Passport Credits”; recorded online products that were previously valued at “1 Passport Day” may now require only “6 Passport Credits”. Credits for each seminar and product will be indicated with their descriptions.



## Personal PD Passport

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

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



### AN EXAMPLE OF POTENTIAL SAVINGS

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

Without Personal PD Passport = \$2,175

**1 Personal PD Passport = \$1,485**

**You could save \$690 or 32% discount**

## Flexi PD Passport

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

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



### AN EXAMPLE OF POTENTIAL SAVINGS

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

Without Flexi PD Passport = \$2,110

**1 Flexi PD Passport = \$1,845**

**You could save \$265 or 13% discount**

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

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

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



### AN EXAMPLE OF POTENTIAL SAVINGS

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

Without Mini PD Passport = \$1,080

**1 Mini PD Passport = \$899**

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

# PD NEXUS DAYS STAY VIRTUAL FOR SPRING/SUMMER 2021

PD Nexus Days are unique PD seminars with multiple short sessions throughout the day. Our Nexus Days are focused on exposing members to new knowledge and discussions on topical subject matters, in environments where members can also benefit from networking and learning from peers.

## Business & Leadership Insights

**July 7, 2021**

PD Passport Valid:  
12 Credits | \$380

Come to this live virtual event to obtain new skills and knowledge from a wide variety of presentations, including the ever-popular Economic Outlook. Featuring three streams of break-out sessions, you'll find our familiar Tax Update, other technical topics as well as sessions focusing on the challenges and opportunities of leadership and career development. This fast paced day will introduce you to new ideas, expand your knowledge and sharpen your skills as a business leader.

## Work Life Balance Insights

**July 27, 2021**

PD Passport Valid:  
12 Credits | \$380

In this empowering day, you will learn strategies for managing your physical, emotional and mental health, as well as strategies to increase productivity. Learn about eating for health, mindfulness, breaking habits, managing stress and achieving high-performance rest through two plenaries and three break-out streams. Get clear on what makes life meaningful, and how to cultivate moments that matter. Come away with insights on how to get the most out of each day to live your happier, healthier, and more balanced life.

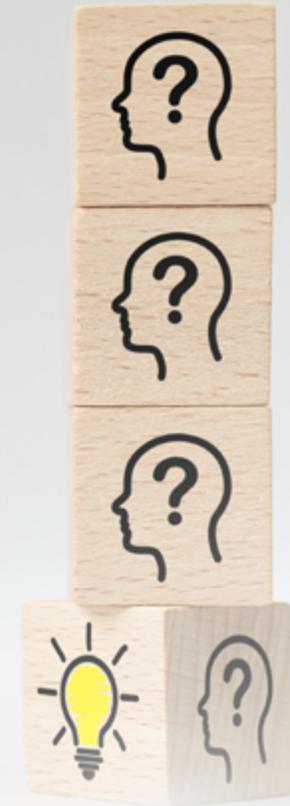
**NEW** for 2021 - join an optional "Laughing Yoga" class to discover the health benefits of laughter.

## Information Technology Insights

**August 12 & 13, 2021**

PD Passport Valid:  
Both days: 24 Credits | \$700  
Single day: 12 Credits | \$380

Keep up with the latest technologies in this two-day event and uncover practical technology topics designed to help alleviate heavy workloads of today's busy professionals. Each session - plenaries and breakouts - have been custom tailored to enhance the day-to-day working environment of professional accountants. Join your peers and panel facilitators at the optional Technology Town Hall on Day 1. New for 2021 - choose to attend one day or the full event.



» **PRICING** Already reflects discount

EXECUTIVE PROGRAMS

# Moving You Forward

Discover how you can move yourself  
and your organization forward with  
CPABC's Executive Programs.



## Controller's Program

Created with the aspiring and new Controller in mind.



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

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

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May 19-20, 26-27  
July 14-17  
September 20-21, 27-28  
(Online)



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

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

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May 6-7, 13-14  
November 18-19, 25-26  
(Online)

### CFO Program

Geared towards aspiring and new CFOs.



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

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

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

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

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**Dates and venue to be announced**



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

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

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**June 17-18, 24-25**  
**September 9-10, 16-17**  
(Online)

## CFO as Navigator Program

Geared towards seasoned financial executives.



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

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

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

## The CEO Program

Geared towards current and aspiring leaders.



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

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

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**June 1-4, 14-16**  
(Online)

### Enterprise Risk Management Fundamentals

Geared towards financial professionals seeking knowledge in risk management.



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

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

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**May 5-7**  
**October 18, 20, 22**  
(Online)

### Smart Leaders 2023

Geared towards leaders in positions of executive responsibility.



**Smart Leaders 2023** is a stand-alone program for leaders seeking to liberate their genius, to change the way they think, and to strengthen their capabilities as decision makers, risk-takers and innovators to meet the demands of an increasingly volatile and complex business environment.

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

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

## Governing with Intention™

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



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

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

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**Oct 28-29, Nov 4-5**  
(Online)

## Did You Know?

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

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

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

Faculty



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

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**TERESA FACILITATES**  
Governing with Intention™



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

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**VIJAY FACILITATES**  
The CFO as Navigator Program



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

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**LINDA CO-FACILITATES**  
The Controller's Management Program



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

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

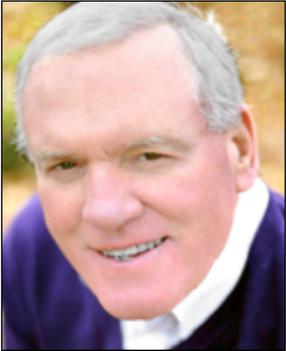


**LESLEY-ANN MARRIOTT, CEC, PCC**, is a certified executive coach who holds the advanced credential of professional certified coach. A former executive in the food industry, Lesley-Ann has over 25 years of leadership and management experience. She has facilitated hundreds of corporate partnerships at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

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

## Faculty



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

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### JIM FACILITATES

The CEO Program  
Smart Leaders 2023



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

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### JEFFREY FACILITATES

The CFO’s Operational Skills Program



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

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### TAMMY CO-FACILITATES

The CFO’s Leadership Program



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

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

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### BILL FACILITATES

Enterprise Risk Management Fundamentals

## CERTIFICATE PROGRAMS

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



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

## Strategic Management



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

### Why take this program?

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

### Who is this program designed for?

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

## Advanced Strategic Management



This two-module program focuses on integrating frameworks and strategic plan implementation, through the application of critical components of leadership and strategy. It includes high-level frameworks for strategic planning, implementation and monitoring including risk assessment and determination of the impact of change management initiatives on governance and teams. Upon completion of the two modules – **Strategy: Maps;** and **Strategy: Links,** members will qualify for the Advanced Strategic Management Certificate. Completion of the Strategic Management Certificate Program is not a pre-requisite. Please note: there are no summer dates for this program, it will be available in fall/winter.

### Why take this program?

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

### Who is this program designed for?

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

## Resilient Leadership



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

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

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

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

### Why take this program?

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

### Who is this program designed for?

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

## Faculty

### STRATEGIC MANAGEMENT & ADVANCED STRATEGIC MANAGEMENT



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



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

### RESILIENT LEADERSHIP



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

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



### Corporate Finance Institute (CFI)

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



### CPA Crossings

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



### Business Learning Institute (BLI)

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



### Executive Finance

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



### K2E Canada Inc

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



### LumiQ

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



### ProDio Audio Learning Inc

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



### CPABC PD Video On-Demand

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



### PD AudioWeb

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

### How to search for these offerings

Use the Keywords search field and type "LumiQ", "Executive Finance", "CPA Crossings", or "BLI". Existing partners include "CFI", "K2E", and "ProDio".

For CPABC Video On-Demand or PD AudioWeb titles, use the Keywords search field and type "Video On-Demand" or "AudioWeb".

## IN-HOUSE PRESENTATION SERVICES

### Making Corporate Training Happen

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

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

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

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

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

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

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

## IN-HOUSE PRESENTATION SERVICES

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



70+

Sessions offered



2,400+

participants from 26 organizations (industry & public practice)



4.2/5.0

average course rating



300+

seminar titles to select from

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

**Keith Elliott**, Partner  
Manning Elliott LLP, Vancouver, BC

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

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

## Paperless Seminar Materials & Online Services

### Frequently Asked Questions

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

We launched our paperless initiative in February 2019 to:

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

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

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

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

No, we no longer offer a print option.

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

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

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

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

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

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

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

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

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

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

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

### Discounted Pricing for the the Spring/Summer Program

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

#### 20% OFF Individual PD seminars

A 20% discount will be applied to in-person courses, live webinars, and select on-demand virtual products dated through **August 31, 2021**. Some CPABC PD products may be excluded from this offer.

#### 10% OFF PD passports

A 10% discount will be applied to all 2020-2021 PD passports purchased. The PD Passport program is a savings program for individuals who plan to take multiple CPABC PD seminars throughout the year. Depending on the type of passport chosen, PD passport holders are entitled to 30-60 credits that can be applied toward passport-eligible seminars.

#### » WATCH

Visit our website for tips & videos

# Registration & Payment

### Confirmation of Registration

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

### Seminar Venues & Dates

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

### Registration Cancellations, Transfers & Refunds

In light in COVID-19 and the many uncertainties it presents, CPABC will be waiving our \$25 and \$50 cancellation fee on registrations to CPABC PD seminars held through to August 31, 2021. 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.

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

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

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

### Seminar Cancellations by CPABC

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

### Seminar Leader Substitution

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

### Meals for In-Person Seminars

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

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

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

### Flexi PD Passport Registrations

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

### Audio/Video Recording & Photography

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

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

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

The Terms & Conditions specified above.

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

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

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



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