

# PD NEXUS: Scientific Research & Experimental Development Symposium

October 5, 2018 · Vancouver Convention Centre (West Building), Vancouver

This symposium will present key topics and updates of new developments in SR&ED claims.

A diverse mix of presentations and panel discussions featuring SR&ED practitioners and senior staff from the CRA will provide opportunities to increase your technical knowledge, stay ahead of new developments and trends, and network with other SR&ED practitioners and experts.

This symposium is geared towards accountants, engineers and others who advise on SR&ED matters, both specialists and general practitioners; technical experts and financial executives accountable for tax filings and SR&ED compliance; and CRA and Department of Finance employees responsible for SR&ED matters.

Sessions include presentations, panel discussions and the opportunity to work through case studies guided by dedicated staff from the CRA and experienced practitioners.

**October 5**  
**Vancouver Convention Centre**  
**West Building**

Course Fee: \$475  
CPD Hours: 7  
PD Passport Valid: 1 day

Please note that PD Nexus conferences are paperless offerings. An email containing the web link where registrants can download the materials in PDF format will be sent to registrants 2 business days prior to the event date.

To register, please go to our website at [pd.bccpa.ca/conferences](http://pd.bccpa.ca/conferences) or email us at [pdreg@bccpa.ca](mailto:pdreg@bccpa.ca).



## CONFERENCE SPEAKERS



*Lynn Burch* is General Counsel with Tax Law Services at the Vancouver offices of the Department of Justice. Her practice is varied, and she and her team have handled many precedent setting tax cases. Lynn also conducts large project litigation. Her most recent SR&ED case was *Maximus BC Health Inc. v. HMQ 2015-3185(IT)G*, in which the issue was whether amounts the taxpayer claimed as SR&ED were paid to it were contract payments within the meaning of ss. 127(9).



*Jason Charron, B Comm, CPA, CMA* is the Director General of the Scientific Research and Experimental Development Directorate (SREDD). Jason is passionate about helping firms grow through technological innovation. He has partnered with public and private stakeholders to improve how programs meet the needs of the innovation sector.



*David Douglas, CPA, CA, MBA* is Partner, SR&ED and Government Incentives at BDO Canada LLP. David is BDO's Government Incentives leader in the Central Region, with over 25 years of professional experience. His current consulting activities are directed towards assisting clients in maximizing the funding opportunities available through government grant and incentive programs.

*Albert de Luca, FCPA, FCA* is a Tax Partner and National Leader of Deloitte's Global R&D/ Government Incentives group. He advises Canadian companies and multinationals on matters relating to their innovation investments in Canada and globally, including cost-sharing agreements, intellectual property transfers and optimization of related incentives.



*Joanne Hausch, CPA, CA, ICD.D* recently retired from Deloitte LLP where she was a tax partner in the Global R&D and Government Incentives practice. Joanne has 30 years of experience in tax and is recognized as a national expert on the topic of R&D, innovation and productivity.



*Elizabeth Pringle, B.Sc., M.Sc.* is the Knowledge Leader for EY's Business Tax Incentives team with over 20 years of experience in Canada's SR&ED Program. She spent 8 of those years working with the CRA. She has experience as a Research and Technology Advisor and Manager, and was actively involved in policy development as the manager of the SR&ED National Technology Sector Specialists. Elizabeth also spent 10 years conducting research in both the private and public sectors.



*Jim Simpson, CPA, CMA* is the Assistant Director for the SR&ED program for the Prairie Region. Since 1985, he has worked in numerous divisions with the CRA, and joined the SR&ED Program in 1995. Jim has played a key role in the development and implementation of operational and risk management policies as well as national training for the program. He works closely with SR&ED tax practitioners to discuss legislative issues and streamline the review process for claimants.



*Amy Siu, BA, CPA, CA* is the Assistant Director for the SR&ED program for the Pacific Region. Since joining the Canada Revenue Agency in 2014, Amy has worked in many business and program lines, including Audit, Appeals, GST/HST Rulings and Criminal Investigations. She actively collaborates with stakeholders to enhance the SR&ED review process and reduce administrative burden. She is passionate about service, values and ethics, leadership and continuous improvement.

### Symposium Panelists:

*James Muir, Keith Chrystall, Ken Douglas, Elizabeth Pringle, Ed Zacharuk, Michael Dennison, Jay McLean, Ted Bell*

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# SCIENTIFIC RESEARCH & EXPERIMENTAL DEVELOPMENT SYMPOSIUM - AGENDA

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8:30-8:40AM  
Introduction

Welcome and introductory remarks from *Nicola McLaren, Program Director, Professional Development, CPABC*.

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8:40-9:20AM  
Plenary

## CRA Services & Tools

*Jim Simpson & Amy Siu*

In recent years, the CRA's SR&ED Program has implemented services and initiatives to improve the predictability and reduce the complexity of the program, in order to better meet the needs of users. This session highlights achievements to date and discusses the CRA's national strategy and regional initiatives put in place to deliver the mandate of the program.

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9:20-9:35AM: *Transition Break*

9:35-10:35AM  
Plenary

## Current Trends Practitioners are Seeing with CRA - A Panel Discussion

*Facilitator: Albert de Luca*

*Panelists: Ken Douglas, Elizabeth Pringle, Ed Zacharuk*

In this panel discussion, SR&ED practice leaders from across the country will discuss their experience and observations on current trends practitioners are seeing from CRA regarding SR&ED claims.

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10:35-10:50AM: *Refreshment Break*

10:50-11:50AM  
Plenary

## Recent Case Law Update

*Lynn Burch*

Although SR&ED cases are largely fact driven, in 1998, the Tax Court of Canada in Northwest Hydraulic set out the approach to be taken in assessing a taxpayer's activities and the statutory definition of SR&ED. This session will explore how the five considerations set out in that decision have been applied in recent cases.

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11:50AM-12:50 PM: *Lunch*

12:50-1:50PM  
Plenary

## Being Prepared for Success for SRED Reviews - A Panel Discussion

*Facilitator: Elizabeth Pringle*

*Panelists (CRA): James Muir, Keith Chrystall*

*Panelists (Practitioners): Michael Dennison, Jay McLean, Ted Bell*

In this panel discussion, SR&ED practice leaders from across the country will discuss their experience and observations on current trends practitioners are seeing from CRA regarding SR&ED claims.

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1:50-2:00PM: *Transition Break*

2:00-3:30PM  
Breakout  
Workshops

## Case Study: IT & Software Technical and Financial Components

*Facilitator: Joanne Hausch*

Choose between two workshops, where you will work through a case study with assistance from both SR&ED practitioners and CRA representatives. Both Technical and Financial components of the case will be explored.

## Case Study: Shop Floor Technical and Financial Components

*Facilitator: Dave Douglas*

Choose between two workshops, where you will work through a case study with assistance from both SR&ED practitioners and CRA representatives. Both Technical and Financial components of the case will be explored.

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3:30-3:50PM: *Refreshment Break*

3:50-4:30PM  
Plenary

## CRA Roundtable

*Jason Charron, Jim Simpson, Amy Siu*

Presented in a Q&A format on current SR&ED issues, CRA panelists will provide a response to questions submitted in advance.

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