PD NEXUS: Public Practice Insights

November 15, 2018 · Vancouver Convention Centre (West Building), Vancouver

Offered annually, this popular conference for CPABC members in public practice has been updated with new topics. Practitioners will benefit from practical learning sessions that include both technical knowledge and practice management tips and advice. The conference format is designed to provide instruction in topical areas of importance to public practitioners, and to encourage discussion and the exchange of ideas.

The conference will be a great opportunity to update your technical knowledge and learn best practices to address some of the key changes and challenges in professional practice in BC today. Be prepared to learn, discuss, network with your peers, and enjoy this dynamic, interactive conference day.

All practitioners in public practice in BC would benefit from attending this conference, particularly sole practitioners and members of small to medium sized firms.

November 15
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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

To register, please go to our website at **pd.bccpa.ca/conferences** or email us at **pdreg@bccpca.ca.**

CONFERENCE SPEAKERS

Hayley Brown, CPA, CA, is a Senior Manager, Tax at KPMG LLP. Hayley is a Canadian corporate tax practitioner with skills in domestic and international tax compliance and planning as well as accounting for income taxes under IFRS and US GAAP. She specializes in income tax issues for mining and resource companies. Hayley is a contributor to various industry publications as well as a presenter for the CPABC and a member of the Canadian Tax Foundation Young Practitioner's Vancouver Steering Committee.

Helen Fotos is a senior technology and management consultant specializing in delivering high profile initiatives for clients ranging from multinational Fortune 500s to Silicon Valley technology firms to public sector organizations. A seasoned advisor on digital transformation, Helen's current focus is emerging sectors and technologies, including Cannabis legalization and Blockchain adoption. She also leads the Victoria-based Meetup FutureGov.AI, which aims to demystify artificial intelligence and explore the impact of exponential technologies for government.

Tom Gillespie, CPA, CA is a director and co-founder of Clearline Consulting CPA. He has 10+ years accounting and assurance experience having been associate director of practice review and a professional standards advisor with CPABC, as well as an audit manager with a major international accounting firm. Tom provides file compliance, monitoring, in-house training, audit planning and on-going consulting services to CPA firms and practitioners, helping them succeed and build thriving practices.

Ryan Howe, LL.B. is a business lawyer at Alexander Holburn Beaudin + Lang LLP, a BC regional full service firm based in downtown Vancouver. Ryan advises accountants and various other professionals on corporate and commercial matters ranging from engagement letters and partnership agreements to acquisitions and dispositions of professional practices.

Ari Indyk, BA, MA leads Edelman Vancouver's Crisis & Risk practice group, where he provides senior-level issues management and crisis communications counsel to clients across a range of sectors, including the financial services industry, around situations involving significant reputational risk, such as data security incidents. Ari holds a BA in Political Science, an MA in Government, as well as Incident Command System certification.

Cody Mann, JD is a commercial insurance litigator at Dolden Wallace Folick LLP with experience conducting trials, tribunal hearings, mediations, and settlement negotiations. His cyber and privacy practice includes acting as a cyber breach coach and defending insureds in privacy litigation or regulatory claims.

Lesley-Ann Marriott, PCC, CEC holds the advanced credential of Professional Executive Coach. A former executive, she has spent thousands of hours coaching senior leaders and teams, many of whom are professional accountants. Described as "edgy and fun", her sessions are highly interactive and entertaining. Lesley-Ann is Principal at Marriott Management Group, Associate Faculty at Royal Roads University – Executive Coaching Program, an instructor for CPA's Executive Leadership Program and Senior Associate of Personal Strengths Canada – Core Strengths.

Bridget Noonan, CPA, CA is an assurance partner at and co-founder of Clearline Consulting. Following 12 years in the audit and assurance practice of a mid-sized accounting firm, she moved into a professional standards adviser role at CPABC where she supported and assisted practitioners. Bridget now focuses on the provision of assurance services to private and not-for-profit organizations, and consulting services to small and mid-size firms in the areas of regulatory and standards compliance, post-practice inspection requirements, buy-sell brokerage services, monitoring, in-house training and efficiency projects.

Shane Onufrechuk, FCPA, FCA, is a Partner, Tax at KPMG LLP. Shane's focus in the firm is in the area of Canadian Corporate Tax with an emphasis on PPP project finance structuring, corporate reorganizations, acquisitions and providing tax advisory services to other professionals. Shane speaks at CPABC PD events, plays an active role in CPABC professional development, and had been involved in teaching and course development for the CPA Western School of Business as well as the Sauder School of Business.

David Wende, CPA (Hon). For close to 4 decades, David was considered one of Canada's leading lawyers in the defence of professional negligence and conduct matters involving our profession. A strong advocate for active risk management, David's counsel was sought from across Canada for his expertise with the CPA Code of Professional Conduct, engagement letter content, and risk management training. In November 2017, the CPABC Board conferred an honorary CPA on David for his contribution to the profession.

cpa CHARTERED PROFESSIONAL ACCOUNTANTS BRITISH COLUMBIA

PUBLIC PRACTICE INSIGHTS - AGENDA

8:30-8:35AM
Introduction

Welcome and introductory remarks.

8:35-10:05AM
Plenary

CPA Risk & Liability: Cautionary Tales & Best Practices to Avoid Problems

David Wende

As long as you are honest and hard-working, you'll stay out of trouble as a CPA practitioner, right? Unfortunately that's not always true, and often when CPAs have faced liability claims, David Wende was the lawyer defending them. David's humourous and practical presentation style will keep you entertained while you learn valuable practice lessons on engagement letters (and why you need them), defensive tax practice for small practitioners, what to do if you ever face a complaint, and the lessons learned in over 30 years of defending accountants.

10:05-10:20AM: Refreshment Break

10:20-11:20AM
Breakout

Buying, Selling or Transitioning Your Small Firm

Bridget Noonan, Ryan Howe

We hear a lot in the news about the mid-tier and large firm acquisitions and mergers. It is difficult to find comparable information about the sale and merger of small firms. Join us for a discussion of the key factors that determine the valuation of small accounting firms. This session is for anybody looking at buying or selling an accounting practice, or transitioning

Privacy Law and Breach Response Strategies: It *Can* Happen to You!

Cody Mann, Ari Indyk

Do you know your obligations regarding safeguarding your clients' private information, and what to do if a breach occurs? In this session, Cody Mann will outline the basics of privacy law relevant to CPA practitioners, including the new PIPEDA rules effective November 2018, illustrated by actual cases. Ari Indyk will provide practical strategies for crisis communication in the event of a privacy breach, and will lead participants through a simulated data security incident to bring these concepts to life.

11:20-11:30AM: Transition Break

11:30-12:00PM
Roundtable

Roundtable Discussions

Attendees will participate in small roundtable groups. Each roundtable will discuss a particular topic for 30 minutes, in a discussion led by a moderator. This is an opportunity to discuss and exchange ideas, solve problems, and learn from your peers. Come prepared to share, learn and be inspired with new ideas and solutions for your practice. Possible roundtable topics include: Working in the cloud; Attracting and retaining staff; Working with diverse clients and staff; Billings and collections; Client and workflow management; Marketing and networking; Social media; Technology: Apps, programs and devices; Paperless office; Training CPA students; and Cybersecurity & data protection. During registration, registrants will select a topic of interest for each roundtable session.

12:00-12:50 PM: Lunch

12:50-1:20PM
Roundtable

Roundtable Discussions

See description above.

1:20-1:30 PM: Transition Break

1:30-2:15PM
Plenary

Compilation Engagements: Changes are Coming

Tom Gillespie

The AASB exposure draft on the new standard to replace Section 9200, Compilation Engagements proposes significant changes that will impact most practitioners. This session will outline the proposed changes and how you can provide feedback to the exposure draft.

2:15-3:15PM
Plenary

Demystifying the Hype Around AI and Automation Technologies

Helen Fotos

The sensationalized media coverage around Artificial Intelligence (AI) and other automation technologies can make it difficult to separate hype from practical business applications. This session will demystify emerging technologies and provide an overview of the various types of automation that are currently available for adoption, even for small entities without deep pockets or dedicated IT teams. Attendees will learn about use cases in Accounting and explore practical tips for adopting emerging technologies in their day-to-day business operations.

3:15-3:30PM: Refreshment Break

3:30-4:30PM
Breakout

Specified Corporate Income: The Long Reach of the New Rules

Hayley Brown, Shane Onufrechuk

The 2016 Federal Budget put in place complicated new rules to prevent the multiplication of the small business deduction by owners of a business. As is often the case, the impact of these rules is more wide spread then the budget document suggested and adds complexity to many corporate tax returns. This course will provide participants with a high level overview of the rules and unexpected traps to watch out for, including common structures that are impacted by these rules and potential restructuring opportunities.

How to Tackle the Difficult Conversation

Lesley-Ann Marriott

As public accountants, we often find ourselves in a situation where we must tactfully inform our clients or colleagues of news they don't want to hear. Difficult conversations are an art and it is possible to embrace the challenge and overcome the anxiety a difficult conversation presents. This session will outline the simple process to prepare and approach all challenging conversations and provide brain science tips for creating positive interactions that transform even the most difficult conversations into stronger relationships.