

PD NEXUS: Business Insights Vancouver

December 7, 2018 · Vancouver Convention Centre, West Building

Join colleagues and other professionals for this popular *PD Nexus* day, with a revised format that includes more topics and shorter afternoon break-out sessions.

Our plenary sessions will anchor the day. **Andrew Sweeney** will open the day with a discussion on the risks and opportunities that exist in the current economic environment. **Alex Wray** will close the day with a session on what leadership looks like in an age of change.

This PD Nexus day will be a great opportunity mix and match technical updates in accounting and tax with practical sessions to help you get more done in a day, and leadership sessions to develop the skills needed to thrive in today's technology driven and fast changing environment. You will hear from subject matter experts and industry leaders who will help you learn, grow and develop as a business leader.

PD Nexus - bringing together knowledge, skills and business professionals. Don't miss this chance to network with your peers and return to your work inspired and with new knowledge and skills.

December 7, 2018
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 or email us at pdreg@bccpa.ca.

CONFERENCE SPEAKERS



Ward Blatch, CPA, CA is a partner with K2 Enterprises Canada. Since joining K2 Enterprises in 2005, he has provided consulting and training services throughout the United States and Canada. Ward also has his own practice in Nova Scotia providing accounting, business consulting, training, and information technology support and evaluations to small business.



Daphne Gray-Grant is a former senior newspaper editor and communications coach who has had her own business for the last 20 years. She has worked with such organizations as BC Hydro, the Calgary Stampede, Intel, and Miami University, training their employees to become more skillful communicators. Daphne is known for her interesting and highly interactive workshops and writes a free weekly newsletter on writing that is read by almost 22,000 people world-wide. She is also the author of the bestselling book *8½ Steps to Writing Faster, Better*.



Denise Lammi, CPA, CA has been professionally involved with income tax matters for over 25 years. She specializes in Canadian income taxation with an emphasis on all matters relevant to owner-manager businesses. Denise is an entertaining and enthusiastic speaker who lectures extensively on income tax matters while authoring and mentoring numerous taxation related professional development courses and seminars.



Casey Miller, President of 6 1/2 Consulting has more than 15 years' experience in leadership roles and leadership training across the public, private and non-profit sectors. Over the span of his career, Casey has served as a facilitator and trainer in domestic and international enterprises, helping organizations reach their potential through research-based organizational psychology. Casey holds a Masters degree in Public Administration and another in Theological Studies from Harvard University.



Andrew Sweeney, CPA, CA is an institutional portfolio manager who specializes in broad-based portfolios with a focus on equity mandates. As a CFA charterholder and CPA, CA, he is a capability specialist on both capital markets and the integration of environmental, social and governance (ESG) considerations in institutional portfolios. Since entering the investment industry in 1995, Andrew has held analytical research responsibilities for most sectors within the Canadian equity market and, as a result, has acquired a strategic, long-term perspective regarding market dynamics and the implications of macroeconomic developments.



Yoel Tewelde, MBA is a corporate FX dealer and Risk Management Consultant with EncoreFX. He works alongside financial professionals and business owners, providing systematic hedging strategies to mitigate FX Volatility risk as well as treasury solutions. Prior to joining EncoreFX, Yoel's professional experience included roles in management, operations, sales, and professional services. He holds an MBA in finance from Cass Business School and is currently pursuing the CFA charter.



Tammy Towill, MBA, FCPA, FCMA is a partner in the Cordura Group and faculty with Capilano University, providing business and financial advisory services and related education and training programs to communities and organizations seeking growth or change. For over 20 years, Tammy has worked with private and public sector companies throughout North America and Europe, providing education, training and facilitating in the areas of leadership, strategy, business planning and curriculum development and implementation. She has served on and worked with several boards in Canada and the US.



Alex Wray uses the science of habit change to equip leaders and teams with tangible tools to improve performance, transform culture and achieve extraordinary business results. Alex brings over 25 years as a trusted adviser of top teams and leaders throughout North America and globally, from Singapore to Switzerland. He is faculty with Notre Dame University's Executive Integral Leadership (EIL) program— recognized as one of the premier leadership development programs in North America.

PD NEXUS: BUSINESS INSIGHTS VANCOUVER - AGENDA

8:30-8:35AM
Introduction

Welcome and introductory remarks from *Simone Leonard, VP, Education & Professional Development, CPABC.*

8:35-10:05AM
Plenary

Economic Outlook

Andrew Sweeney

The Canadian economy is enjoying the strongest rate of sustained growth since the 2008 financial crisis. Bolstered by robust global expansion, renewed investor confidence, and a rallying resource sector, GDP growth reached 3% in 2017. Yet a complex array of challenges lie ahead as an aging business cycle and intensifying geopolitical threats heighten market volatility. Andrew Sweeney will discuss the pertinent risks and opportunities that exist in the current economic environment.

10:05-10:20 AM: Refreshment Break

10:20-11:50AM
Breakout

Tax-ercises: Stretch and Strengthen Your Tax Core

Denise Lammi

Get ready to Tax-ercise! This fast paced and entertaining session will give your tax knowledge a work-out and refresher of some commonly misunderstood tax fundamentals. Areas targeted include: core principles, practical matters and fallacies. We'll go over the taxation of automobiles and other benefits, things a taxpayer should never do, when to engage a tax specialist and more.

Securing your Organizations Future - Managing the Revolving Door of Succession Planning and Employee Retention

Tammy Towill

The immense business risk due to turnover, lack of available talent and the inevitable departure of those nearing retirement age creates an ever increasing need to engage, retain and replace key talent. This session will examine succession planning at every level, not just at retirement, and how to attract and retain employees, especially the millennial generation. We will explore tools and strategies for how best to mitigate these risks to ensure your organization's future stability and success.

11:50AM-12:40 PM: Lunch

12:40-1:40PM
Breakout

The Return of Foreign Exchange Volatility and How to Mitigate the Risks to Your Business

Yoel Twelde

As central banks roll off their quantitative easing programs, FX volatility has returned in dramatic fashion. What does this mean to the CPA and how can you address this increase in business risk? This session will explore how the changing financial and political landscape has increased the level of FX risk, how to define this risk pertaining to your business' bottom line and the various tools and strategies available to help manage it.

A Practical Tool to Help You Deliver Polished Presentations

Daphne Gray-Grant

Do you become anxious every time you're faced with making a presentation to your executive group, or, worse to a big crowd? Calm your nerves with an easy-to-use 7-step process that will make presentations a breeze. Even better, learn the skill of Mind Mapping to help generate new ideas and inspire you to prepare your presentation in record time.

1:40-1:55 PM: Refreshment Break

1:55-2:55PM
Breakout

Blockchain and Other Emerging Technologies

Ward Blatch

The next wave of technology is arriving now, and you will need to choose from various technologies and tools to maintain and improve your business productivity. Each emerging technology – including Blockchain, Artificial Intelligence, Big Data, and Machine Learning – will be explained including why it is important, how it works and what solutions are available for immediate implementation. Actual products will be used as examples in each category, turning this discussion from theoretical overview into practical selection and how-to advice.

The Robots are Here: How Automation is Demanding that Soft Skills be our Competitive Advantage

Casey Miller

AI, machine-learning, and robotics are automating everything from manufacturing to biotechnology. Accounting is not immune. With disruption impacting the future of work, what skills will be key to keeping our profession relevant? This session will highlight changes expected for our industry, and give insights into the human skills that will be most imperative now that the robots are here. Participants will leave with insights into emotional intelligence building and empathy.

2:55-3:10 PM: Refreshment Break

3:10-4:30PM
Plenary

Mastering Leadership - What Type of Leadership is Needed to Drive Business Performance Today?

Alex Wray

In an age of unprecedented change, leadership matters more than ever; but what does it actually look like? What rules still apply? This presentation offers a fresh lens through which to view leadership, based on compelling and conclusive research. Participants will learn how to apply a more agile mindset when leading, 5 leadership competencies proven to be the greatest drivers of business performance and 3 behavioral patterns to avoid that most frequently erode a leader's impact.
