CHARTERED PROFESSIONAL ACCOUNTANTS BRITISH COLUMBIA

Professional Development

Reap the Rewards

2018/2019

FALL | WINTER

CHARTERED PROFESSIONAL ACCOUNTANTS BRITISH COLUMBIA

Welcome to the Fall/Winter CPABC PD Program!

We are pleased to bring you another season of quality PD seminars. The program contains over 200 titles and over 500 offerings occurring at over 20 locations across the province. Recognizing the diverse backgrounds and desired learning needs of our membership, the program continues to provide an extensive listing of in-classroom seminars in the areas of tax, accounting, assurance, finance, technology, wealth management, strategy and governance and many other areas of interest in both technical and enabling skills development.

Through our expanded partnerships with online learning providers, we are also pleased to provide an array of web-based learning seminars that cover both technical and enabling skills development and allow members the flexibility afforded by online learning sessions – details on the online offerings can be found on pages 152-161.

This season contains four exciting PD Nexus Days (formerly PD Conference Days). PD Nexus Days provide an excellent opportunity to deep dive into specific topical areas of interest. For members in Public Practice, the Public Practice Insights Nexus Day provides coverage on topics relevant to the small to medium practitioner; and those members supporting organizations with R&D, must attend the inaugural SR&ED Symposium. We have also brought back the popular Business Insights Nexus Day (formerly Members in Business and Industry) and the Estate Planning Insights Nexus Day. More information on the PD Nexus Day line-up can be found on pages 144-146.

The Controller and CFO Executive programs continue to be in demand and this season we'll see an expansion of the Executive Programs with the inclusion of the Enterprise Risk Management Fundamentals Program (and The CEO Program set for 2019). To make these sessions more accessible, we will be piloting offering a few of these sessions, which are traditionally held in outlying locations, directly within the lower mainland. See pages 147-151 for more details.

Your feedback is important to the ongoing evolution of the PD program and we can advise that based on your input, you can expect to see more changes in the new calendar year. This will include an overhaul of the online CPABC PD registration website which will increase the usability of the system. We'll also explore offering more virtual (simul-casted) PD seminars to expand the reach of the program to outlying areas of the province. Finally, in response to the greener initiatives being adopted by many organizations, and diminish the need for hardcopy course materials, we will further facilitate the ability of our systems to manage softcopy storage and access of course materials.

In closing, we believe the Fall/Winter program promises to assist you in meeting your learning objectives through the quality content you will receive. Be sure to look up this season's new titles indicated with 'new' beside the title – a number of the newer titles are showcased in the sidebar on the opposite page.

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General Information

Seminars

Unsubscribe from printed PD catalogue

Our two seasonal PD catalogues (fall/winter and spring/summer) are also available in electronic format on our website. If you do not want to receive printed copies of the catalogues, simply email pdreg@bccpa.ca, and provide your full name and membership number to be removed from the mailing list.

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PD Passports

PD Passports are a great way to save on your professional development training costs! We have a variety of seminars scheduled between September 2018 and August 2019, so consider purchasing a PD Passport to enjoy substantial savings on your PD costs. Our Fall/Winter program, which runs from September to March is covered in this catalogue, while our Spring/Summer program, which runs from May to August, will be covered in the next issue of our catalogue. See page 21 for details on the PD Passports.

Seminar Levels & Naming Conventions

See page 5 for a definition of seminar levels, and explanations of our naming conventions.

Fall Seminar Highlights

The season contains over 30 new course titles. A selection of the newer titles include:

- Assurance & Professional Practice Update – Just for Auditors
- Assurance & Professional Practice Update – Other than Audit
- Audit Engagements – Application of the Standards Using PEG
- ASPE-Strategic Investments (1591, 3051, and 3856)
- Introduction to Financial Reporting Concepts
- PSAS – Introduction to Asset Retirement Obligations
- PSAS – Introduction to Public Private Partnerships
- Internal Controls – Industry Sector
- Business Valuations – Purchase Price Allocations
- Blockchain for Accountants
- How Technology is Impacting the Accounting Profession
- Research Automation Tools for Accountants
- Becoming an Ethical Leader
- Ethics at our Core
- They Dynamics of Cultural and Generational Gaps in the Modern Business Family
- Corporate Tax – Section 55 How Safe are your Dividends
- Income Tax – BC Real Estate Tax
- Income Tax – Income Splitting, A New Era
- US Tax –Cross-Border Financing and US Tax Reform: Tips and Traps
- Essential Documents of any Successful Estate Plan

All seminars are listed on our website at pd.bccpa.ca
For further information, please direct your enquiries to pdreg@bccpa.ca, or call 604 872.7222 and ask for the PD Department.

Accounting & Assurance

Audit & Assurance

Financial Reporting

Management Accounting & Financial Management

Finance

Information & Business Technology

People Management & Personal Development

Communication & Negotiation

Wealth Management

PD Nexus (formerly PD Conference Days)

Executive Programs

Web-Based Learning

Seminars with Ethics Content

Ethics content hours are in brackets

Note that some of our web-based learning titles may also contain ethics hours, see description of individual titles for information.

Seminar Levels

To assist members in deciding if a seminar is right for them, a course "level" is included in the course description. A "level" is based on the information the seminar will disseminate and an assumed pre-requisite knowledge of the potential participant.

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

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

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

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

Naming Conventions

In addition to the identified seminar levels above, the following terminology is sometimes used within some of our seminar titles to further define the content of the seminar.

Update – reviews all relevant changes in a subject area during the past 12-18 months. A solid understanding of the subject area prior to the changes is required.

Review –provides a thorough examination of all the significant standards or concepts in a subject area at an intermediate level. For standards based courses, a majority of, and all key, standards are examined. Basic knowledge of the subject area is required.

Specific Topics –provides a thorough examination of specific standards or concepts in a subject area. Topic coverage is listed in the course description. Fundamental knowledge of the subject area is required.

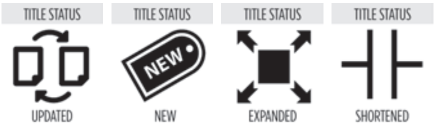
Fundamentals/Foundations – examines the key foundational topics of a subject area. Common knowledge of the subject area is required.

Essentials– provides a general review of the key topics or standards to provide the user with an awareness of a subject area Common knowledge of the subject area required.

Advanced– provides a deeper examination of the significant standards or concepts in a subject area than a fundamental, foundations or essentials course. Fundamental knowledge of the subject area is required.

Seminar Icons - Legend and Definition

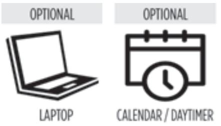
Title Status – will indicate if a course title is new, updated, expanded, or carried forward (no major content change).



Notable Format – will indicate if the course will be taught in a format other than standard classroom, lecture.

Required – will indicate what registrants are required to bring to the class.

Optional – will indicate what registrants are encouraged, but not required, to bring to the class.



Special Feature – will indicate if the course has any unique features.

Available Option – will indicate if the course will also be available in a different option or format.

Vancouver

Oct 05	[T87100A_VA]	PD Nexus: Scientific Research and Experimental Development (SR&ED) Symposium	8:30am-4:30pm	Van Conv Ctr West	146
Oct 16	[T83000A_VA]	Income Tax – Update 2018	9am-5pm	Hyatt Regency	130
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Oct 24	[M83490B_VA]	Becoming a Skilled Negotiator	9am-5pm	Four Seasons	80
Oct 24	[T83090A_VA]	Income Tax - Everyday Issues for General Practitioners	9am-5pm	Four Seasons	126
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Oct 25	[C82005A_VA]	Blockchain for Accountants	9am-12:30pm	UBC Robson	62
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Oct 25	[A83600B_VA]	Advanced Financial Statement Analysis	9am-5pm	Four Seasons	45
Oct 25	[T83000F_VA]	Income Tax – Update 2018	9am-5pm	Four Seasons	130
Oct 25	[E82051I_VA]	Shades of Grey: Ethics in the Workplace	1pm-5pm	Four Seasons	91
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Oct 26	[A83140B_VA]	IFRS – Mining Industry	9am-5pm	Four Seasons	37
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Nov 22	[T83380A_VA]	US Corporate Tax – Fundamentals	9am-5pm	Van Conv Ctr West	136
Nov 22	[T82210B_VA]	Corporate Tax – Shutting Down the Corporation	1:30pm-5pm	Van Conv Ctr West	118
Nov 22	[C82040A_VA]	Excel Macros Demystified	1:30pm-5pm	Van Conv Ctr West	68
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Nov 23	[M83023D_VA]	Wiring Your Brain for High Impact Leadership	9am-5pm	Van Conv Ctr West	104
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Nov 26	[T82012F_VA]	Income Tax - Income Splitting, A New Era	9am-12:30pm	Sutton Place	127
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Nov 28	[T83000V_VA]	Income Tax – Update 2018	9am-5pm	Hyatt Regency	130
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Nov 29	[A83007A_VA]	Internal Controls – Industry Sector	9am-5pm	Sutton Place	51
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Nov 29	[T83322A_VA]	US Tax – Real Estate & Personal Investments	9am-5pm	Four Seasons	137
Nov 29-30	[A84020B_VA]	Audit Engagements – Review of the Standards	9am-5pm	Sutton Place	29
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Nov 30	[A83111A_VA]	ASPE – Related Party Transactions	9am-5pm	Hyatt Regency	35
Nov 30	[T83000X_VA]	Income Tax – Update 2018	9am-5pm	Hyatt Regency	130
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Dec 03	[T83040B_VA]	Advanced Tax Planning Strategies	9am-5pm	Sutton Place	113
Dec 03	[A83281C_VA]	Fraud Risk Management Principles & Practices – An Integrated Approach	9am-5pm	Sutton Place	50
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Dec 03	[T83070A_VA]	RIP – Terminal Filing	9am-5pm	Hyatt Regency	133
Dec 03	[A82006A_VA]	Introduction to Financial Reporting Concepts	1:30pm-5pm	Sutton Place	40
Dec 04	[A81003A_VA]	PSAS – Introduction to Public Private Partnerships	8am-10am	Sutton Place	43
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Dec 04	[T83001A_VA]	Income Tax – Update 2018	9am-5pm	Hyatt Regency	130
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Dec 04	[T83211A_VA]	RIP – Estate and Testamentary Trust Returns	9am-5pm	Hyatt Regency	132
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Dec 05	[M82325A_VA]	Dispelling the Myth of "Effective Meetings"	9am-12:30pm	Sutton Place	98
Dec 05	[A83050C_VA]	ASPE – Disclosure and Presentation	9am-5pm	Sutton Place	34
Dec 05	[T83220E_VA]	Corporate Tax – Tax Returns, Compliance, and Planning	9am-5pm	Hyatt Regency	120
Dec 05	[M83800A_VA]	Managing Change and Transformation	9am-5pm	Sutton Place	102
Dec 05	[T83110B_VA]	RIP – Estate Planning	9am-5pm	Hyatt Regency	133
Dec 05-06	[T84030D_VA]	Tax for Controllers	9am-5pm	Sutton Place	134
Dec 06	[E82040E_VA]	Understanding and Embracing Ethics in the Workplace	8:30am-12:30pm	Sutton Place	91
Dec 06	[A82005B_VA]	Quality Control - Application of CSQC1	9am-12:30pm	Sutton Place	31
Dec 06	[M83480D_VA]	Leadership and Coaching	9am-5pm	Hyatt Regency	101
Dec 06	[M83330C_VA]	Time Management: The Essentials of Productivity Skills	9am-5pm	Hyatt Regency	95
Dec 06	[M83652C_VA]	Tools for Communicating with Difficult People	9am-5pm	Sutton Place	85
Dec 06	[M82216A_VA]	Understanding and Embracing Cultural Relationships in the Workplace	1:30pm-5pm	Sutton Place	99
Dec 06	[A82019B_VA]	Review Engagements – File Review	1:30pm-5pm	Sutton Place	32
Dec 07	[M87100B_VA]	PD Nexus: Business Insights Vancouver	8:30am-4:30pm	Van Conv Ctr West	145
Dec 07	[C82047A_VA]	Advanced Excel Reporting: Best Practices, Tools, and Techniques	9am-12:30pm	Sutton Place	61
Dec 07	[M83017B_VA]	Balancing Your Wheels	9am-5pm	Sutton Place	92
Dec 07	[T83002A_VA]	Income Tax – Partnerships	9am-5pm	Sutton Place	128
Dec 10	[T82090A_VA]	Income Tax – Portfolio Investments	9am-12:30pm	Van Conv Ctr West	128
Dec 10	[C82004A_VA]	Research Automation Tools for Accountants	9am-12:30pm	Van Conv Ctr West	76
Dec 10	[C83040A_VA]	Cloud Computing: The Future is Here	9am-5pm	Van Conv Ctr West	63
Dec 10	[T83001C_VA]	Income Tax – Update 2018	9am-5pm	Van Conv Ctr West	130

Vancouver continued

Dec 10	[A83612C_VA]	Interpreting Financial Statements	9am-5pm	Van Conv Ctr West	52
Dec 10	[M83013A_VA]	Make Change Stick: Getting Results by Changing the Inner Game	9am-5pm	Van Conv Ctr West	102
Dec 10	[M83004C_VA]	Triple Your Reading Speed	9am-5pm	Van Conv Ctr West	96
Dec 10	[A82018A_VA]	Assurance – Compliance with Agreements, Statutes and Regulations (New CSAE 3530 and 3531)	1:30pm-5pm	Van Conv Ctr West	26
Dec 10	[C82003A_VA]	How Technology is Impacting the Accounting Profession	1:30pm-5pm	Van Conv Ctr West	72
Dec 11	[E82060C_VA]	Ethics at our Core	8:30am-12:30pm	Van Conv Ctr West	89
Dec 11	[T82112A_VA]	Current Strategies in Tax Dispute Resolution	9am-12:30pm	Van Conv Ctr West	120
Dec 11	[A83611B_VA]	Essential Topics for Controllers	9am-5pm	Van Conv Ctr West	48
Dec 11	[C83340F_VA]	Google is Not Enough: The Best Search Tools You Aren't Using (But Should!)	9am-5pm	Van Conv Ctr West	72
Dec 11	[A83331B_VA]	IFRS 15 – Revenue Recognition	9am-5pm	Van Conv Ctr West	39
Dec 11	[C83170B_VA]	Paperless Office	9am-5pm	Van Conv Ctr West	75
Dec 11	[M83000B_VA]	Personal Effectiveness: Self Awareness and Balanced Thinking	9am-5pm	Van Conv Ctr West	95
Dec 11	[M83810A_VA]	Professional Presence	9am-5pm	Van Conv Ctr West	90
Dec 11	[M83015G_VA]	Strategic Management Certificate Program – Strategic Planning	9am-5pm	Van Conv Ctr West	111
Dec 11	[M82051A_VA]	Top Employment Issues Affecting Your Bottom Line	1:30pm-5pm	Van Conv Ctr West	109
Dec 12	[C82021C_VA]	Tech Tools and Gadgets for a More Efficient You	9am-12:30pm	Van Conv Ctr West	77
Dec 12	[A83030K_VA]	Budgeting & Financial Management: Understanding Budgeting Variance Analysis & Forecasting	9am-5pm	Van Conv Ctr West	55
Dec 12	[M83005A_VA]	Business English for Professionals – Level 2	9am-5pm	Van Conv Ctr West	81
Dec 12	[A83010C_VA]	Business Valuations – Advanced	9am-5pm	Van Conv Ctr West	56
Dec 12	[A83613B_VA]	Financial Management in the Construction Industry	9am-5pm	Van Conv Ctr West	49
Dec 12	[M83019A_VA]	The Dynamics of Cultural and Generational Gaps in the Modern Business Family	9am-5pm	Van Conv Ctr West	109
Dec 12	[C82130B_VA]	Technology Update	1:30pm-5pm	Van Conv Ctr West	77
Dec 12-13	[A84030B_VA]	IFRS – Review of the Standards	9am-5pm	Van Conv Ctr West	38
Dec 13	[E82011M_VA]	Code Decoded: Evolving Professional Ethical Expectations	8:30am-12:30pm	Van Conv Ctr West	89
Dec 13	[M83219I_VA]	Communicating Effectively Under Pressure	9am-5pm	Van Conv Ctr West	82
Dec 13	[T83080A_VA]	Corporate Restructuring - Section 85: Transfer of Property	9am-5pm	Van Conv Ctr West	116
Dec 13	[M83360D_VA]	Effective & Essential Management Skills	9am-5pm	Van Conv Ctr West	98
Dec 13	[M83640C_VA]	Empowering and Engaging Others	9am-5pm	Van Conv Ctr West	99
Dec 13	[A83250B_VA]	Improving Financial Performance for Controllers and CFOs	9am-5pm	Van Conv Ctr West	50
Dec 13	[C83233B_VA]	Intro-Mediate Excel Techniques	9am-5pm	Van Conv Ctr West	73
Dec 13	[A82301A_VA]	Money, Love and the Law	1:30pm-5pm	Van Conv Ctr West	139
Dec 14	[A82051L_VA]	ASPE & NFPO – Update 2018	9am-12:30pm	Van Conv Ctr West	36
Dec 14	[A83280C_VA]	Fraud Happens – What to do When You Suspect Fraud	9am-5pm	Van Conv Ctr West	30
Dec 14	[A83012B_VA]	IFRS 9 – Financial Instruments	9am-5pm	Van Conv Ctr West	39
Dec 14	[T83180F_VA]	Income Tax – Real Estate	9am-5pm	Van Conv Ctr West	129
Dec 14	[T83001D_VA]	Income Tax – Update 2018	9am-5pm	Van Conv Ctr West	130
Dec 14	[A83256B_VA]	Internal Control Refresher for Financial Managers	9am-5pm	Van Conv Ctr West	51
Dec 14	[C83014C_VA]	Rapid Dashboard Development with Power BI Desktop	9am-5pm	Van Conv Ctr West	76
Dec 15	[T83001F_VA]	Income Tax – Update 2018	9am-5pm	Sutton Place	130
Jan 14	[T83001G_VA]	Income Tax – Update 2018	9am-5pm	Hyatt Regency	130
Jan 16	[T83150B_VA]	GST/HST - Real Property	9am-5pm	Sutton Place	122
Jan 17	[T83101G_VA]	GST/HST – Specific Topics	9am-5pm	Sutton Place	123
Jan 22	[T83210B_VA]	Corporate Tax – Purchase and Sale of a Business	9am-5pm	Sutton Place	116
Jan 23	[T83041C_VA]	Corporate Tax – Small Business Deduction & Related Tax	9am-5pm	Hyatt Regency	118

Vancouver continued

Jan 23-24	[T84020C_VA]	Review of Personal Tax Planning	9am-5pm	Hyatt Regency	132
Jan 24	[T82021C_VA]	Corporate Tax - RDTOH, CDA & Other Tax Accounts	9am-12:30pm	Sutton Place	117
Jan 24	[T82024C_VA]	Corporate Tax – Section 55 How Safe are Your Dividends?	1:30pm-5pm	Sutton Place	117
Jan 25	[T82120A_VA]	Income Tax - Employee Benefits	9am-12:30pm	Sutton Place	125
Jan 25	[A83011B_VA]	ASPE –Strategic Investments (1591, 3051, and 3856)	9am-5pm	Sutton Place	36
Jan 25	[T83001I_VA]	Income Tax – Update 2018	9am-5pm	Four Seasons	130
Jan 28	[M83035F_VA]	Strategic Management Certificate Program – Team Development	9am-5pm	Sutton Place	111
Jan 29	[E82011N_VA]	Code Decoded: Evolving Professional Ethical Expectations	8:30am-12:30pm	Sutton Place	89
Jan 29	[A82004L_VA]	Review Engagements - Specific Topics	9am-12:30pm	Sutton Place	33
Jan 29	[M83045F_VA]	Strategic Management Certificate Program – Change Management	9am-5pm	Sutton Place	111
Jan 30	[T82012J_VA]	Income Tax - Income Splitting, A New Era	9am-12:30pm	Sutton Place	127
Feb 04	[A83050D_VA]	ASPE – Disclosure and Presentation	9am-5pm	Sutton Place	34
Feb 04	[E83101D_VA]	Gateway to Membership: Welcome to the Pros	9am-5pm	Sutton Place	90
Feb 04	[A83222H_VA]	Review Engagements – Application of the New Standards	9am-5pm	Sutton Place	32
Feb 05	[A82051M_VA]	ASPE & NFPO – Update 2018	9am-12:30pm	Sutton Place	36
Feb 05	[T83001J_VA]	Income Tax – Update 2018	9am-5pm	Sutton Place	130
Feb 06	[A81012D_VA]	Assurance & Professional Practice Update – Other than Audit	8am-10am	Four Seasons	27
Feb 06	[M83930D_VA]	Influence and Assertiveness	9am-5pm	Sutton Place	94
Feb 06	[A81022B_VA]	Assurance & Professional Practice Update – Just for Auditors	10:30am-12:30pm	Sutton Place	27
Feb 07	[E82040F_VA]	Understanding and Embracing Ethics in the Workplace	8:30am-12:30pm	Sutton Place	91
Feb 07	[A82010J_VA]	Compilation Engagements - Review of Section 9200	9am-12:30pm	Sutton Place	30
Feb 07	[C83290E_VA]	Excel: The Next Level of Skills	9am-5pm	Sutton Place	66
Feb 07	[A82006B_VA]	Introduction to Financial Reporting Concepts	1:30pm-5pm	Sutton Place	40
Feb 08	[M82190C_VA]	Brain Focus: The Power of Full Engagement	9am-12:30pm	Sutton Place	93
Feb 08	[A82008B_VA]	Compilation Engagements – Introduction to Section 9200	9am-12:30pm	Sutton Place	29
Feb 08	[T83040C_VA]	Advanced Tax Planning Strategies	9am-5pm	Hyatt Regency	113
Feb 08	[A83040D_VA]	ASPE – Real Estate Industry	9am-5pm	Sutton Place	34
Feb 08	[T83260C_VA]	Personal Tax – Tax Returns, Compliance, and Planning	9am-5pm	Hyatt Regency	130
Feb 12	[A83030L_VA]	Budgeting & Financial Management: Understanding Budgeting Variance Analysis & Forecasting	9am-5pm	Sutton Place	55
Feb 12-13	[C84030B_VA]	From Text Files to BI Solution – Building Business Intelligence with Excel	9am-5pm	Sutton Place	71
Feb 13	[E82052E_VA]	Becoming an Ethical Leader	8:30am-12:30pm	Sutton Place	88
Feb 13	[A83111B_VA]	ASPE – Related Party Transactions	9am-5pm	Four Seasons	35
Feb 13	[C83320C_VA]	Excel: Specific Skills for Budgeting, Planning and Forecasting	9am-5pm	Sutton Place	65
Feb 13	[C83050D_VA]	Financial Modeling in Excel	9am-5pm	Four Seasons	71
Feb 13	[E82052F_VA]	Becoming an Ethical Leader	1pm-5pm	Sutton Place	88
Feb 14	[C82023A_VA]	Modeling Business Cash Flows in Excel	9am-12:30pm	Sutton Place	74
Feb 15	[M82140B_VA]	Workplace Law: All You Wanted to Know About and Were Afraid to Ask	9am-12:30pm	Sutton Place	110
Feb 15	[M83600D_VA]	A Coach Approach to Problem Solving	9am-5pm	Sutton Place	86
Feb 15	[A82018B_VA]	Assurance – Compliance with Agreements, Statutes and Regulations (New CSAE 3530 and 3531)	9am-12:30pm	Sutton Place	26
Feb 19	[A83009C_VA]	Business Valuations – Purchase Price Allocations	9am-5pm	Sutton Place	57
Feb 19	[T83220F_VA]	Corporate Tax – Tax Returns, Compliance, and Planning	9am-5pm	Sutton Place	120
Feb 19	[C83260E_VA]	Excel Financial Models and Analysis	9am-5pm	Sutton Place	68
Feb 20	[T81110A_VA]	To Be or Not to Be: The Executor – Powers, Obligations and Liabilities	8am-10am	Sutton Place	135
Feb 20	[A82150E_VA]	IFRS – Update 2018	9am-12:30pm	Sutton Place	38
Feb 20	[M83213B_VA]	Becoming a High Performance Team Member	9am-5pm	Sutton Place	96
Feb 20	[T83180G_VA]	Income Tax – Real Estate	9am-5pm	Hyatt Regency	129
Feb 20	[A83680C_VA]	Writing & Maintaining Task-Based Procedures	9am-5pm	Sutton Place	54

Vancouver continued

Feb 21	[T83090H_VA]	Income Tax - Everyday Issues for General Practitioners	9am-5pm	Hyatt Regency	126
Feb 21	[M83253C_VA]	Influencing Without Authority	9am-5pm	Hyatt Regency	101
Feb 21	[A83614E_VA]	Powerful Financial Analysis	9am-5pm	Hyatt Regency	53
Feb 21	[M83015H_VA]	Strategic Management Certificate Program – Strategic Planning	9am-5pm	Hyatt Regency	111
Feb 22	[A83290I_VA]	Business Valuations – Foundations	9am-5pm	Hyatt Regency	56
Feb 22	[A83300E_VA]	IFRS 16 – Leases	9am-5pm	Sutton Place	40
Feb 22	[T83060F_VA]	Income Tax – 5 Years of Developments	9am-5pm	Hyatt Regency	124
Feb 25	[A82306A_VA]	The Psychology of Investing	9am-12:30pm	Four Seasons	141
Feb 25	[M83002A_VA]	Essence of Leadership	9am-5pm	Sutton Place	100
Feb 26	[M83160C_VA]	Sharpening Your Business Writing Skills	9am-5pm	Sutton Place	84
Feb 26	[M83025E_VA]	Strategic Management Certificate Program – Risk Management and Governance	9am-5pm	Sutton Place	111
Feb 27	[A81014A_VA]	Essential Documents of any Successful Estate Plan	8am-10am	Sutton Place	139
Mar 05	[C83021B_VA]	Building a Financial Model of a Company	9am-5pm	Sutton Place	62
Mar 05	[M83150G_VA]	Clear Thinking/Clear Speaking	9am-5pm	Sutton Place	81
Mar 05	[M83023F_VA]	Wiring Your Brain for High Impact Leadership	9am-5pm	Sutton Place	104
Mar 06	[C83080A_VA]	Financial Model: Merger Modeling	9am-5pm	Sutton Place	69
Mar 07	[T81017A_VA]	BC PST Refresher & Comparison with GST/HST	8am-10am	Sutton Place	114
Mar 07	[A83630A_VA]	Building Enterprise Performance Dashboards	9am-5pm	Sutton Place	46
Mar 07	[C83084A_VA]	Financial Model: Mining Financial Modeling – Understanding and Analyzing a Mining Company	9am-5pm	Sutton Place	70
Mar 08	[A83666A_VA]	Effective Financial Analysis for Business Decisions – Medium-Sized Privately Held Businesses	9am-5pm	Sutton Place	48
Mar 11	[C83011D_VA]	An End to Manual Effort in Excel: The Power Query Effect	9am-5pm	Sutton Place	61
Mar 11	[M83370C_VA]	Communicating with Influence	9am-5pm	Sutton Place	82
Mar 11-12	[T84010F_VA]	Review of Corporate Tax Planning	9am-5pm	Four Seasons	131
Mar 12	[C83390B_VA]	Optimizing Data for Power Pivot using Power Query	9am-5pm	Sutton Place	75
Mar 12-13	[M84040A_VA]	The Art of Negotiating...with anyone	9am-5pm	Four Seasons	84
Mar 13	[C83070B_VA]	Excel: Integrating and Preparing Budgets & Forecasts	9am-5pm	Sutton Place	64
Mar 13	[M83240B_VA]	What Do People Want? Motivating Yourself and Others	9am-5pm	Sutton Place	103
Mar 14	[C82050B_VA]	Word, Outlook, and PowerPoint: Tips and Tricks for Enhancing Productivity	9am-12:30pm	Sutton Place	78
Mar 14	[M83060A_VA]	Conflict: Changing Viewpoints & Influencing Behaviors	9am-5pm	Four Seasons	83
Mar 14	[C82040C_VA]	Excel Macros Demystified	1:30pm-5pm	Sutton Place	68
Mar 14	[A83601C_VA]	Controllership – Operational Management	9am-5pm	Four Seasons	46
Mar 15	[C83380E_VA]	Advanced Data Magic with Excel	9am-5pm	Sutton Place	60
Mar 15	[A83602F_VA]	Controllership – Strategic Leadership	9am-5pm	Four Seasons	47

Abbotsford

Oct 24	[A82010F_AB]	Compilation Engagements - Review of Section 9200	9am-12:30pm	Quality Hotel	30
Oct 25	[E82011C_AB]	Code Decoded: Evolving Professional Ethical Expectations	8:30am-12:30pm	Quality Hotel	89
Nov 06	[M83150D_AB]	Clear Thinking/Clear Speaking	9am-5pm	Quality Hotel	81
Nov 07	[A82051I_AB]	ASPE & NFPO – Update 2018	9am-12:30pm	Quality Hotel	36
Nov 07	[A81012A_AB]	Assurance & Professional Practice Update – Other than Audit	1:30pm-3:30pm	Quality Hotel	27
Nov 08	[A82004F_AB]	Review Engagements – Specific Topics	9am-12:30pm	Quality Hotel	33
Nov 14	[T830000_AB]	Income Tax – Update 2018	9am-5pm	Quality Hotel	130
Nov 16	[A83290G_AB]	Business Valuations – Foundations	9am-5pm	Quality Hotel	56
Nov 19	[C83016D_AB]	Excel Data Magic, Including Advanced PivotTables & Power Pivot	9am-5pm	Quality Hotel	67
Nov 21	[C82003A_AB]	How Technology is Impacting the Accounting Profession	9am-12:30pm	Quality Hotel	72
Dec 06	[T82012G_AB]	Income Tax - Income Splitting, A New Era	9am-12:30pm	Quality Hotel	127
Feb 20	[E82030Q_AB]	Business Ethics: It Starts With You	8:30am-12:30pm	Quality Hotel	88
Feb 20	[E82030R_AB]	Business Ethics: It Starts With You	1pm-5pm	Quality Hotel	88

Burnaby

Oct 25	[E82060A_BU]	Ethics at our Core	8:30am-12:30pm	Executive Hotel	89
Nov 06	[T83000L_BU]	Income Tax – Update 2018	9am-5pm	Executive Hotel	130
Dec 04	[E82011K_BU]	Code Decoded: Evolving Professional Ethical Expectations	8:30am-12:30pm	Executive Hotel	89
Mar 06	[E82030S_BU]	Business Ethics: It Starts With You	8:30am-12:30pm	Executive Hotel	88
Mar 06	[E82030T_BU]	Business Ethics: It Starts With You	1pm-5pm	Executive Hotel	88

Courtenay

Nov 05	[E82011E_CR]	Code Decoded: Evolving Professional Ethical Expectations	1pm-5pm	Best Western Westerly	89
Nov 06	[T83101C_CR]	GST/HST – Specific Topics	9am-5pm	Best Western Westerly	123
Nov 19	[T83000P_CR]	Income Tax – Update 2018	9am-5pm	Best Western Westerly	130
Nov 26	[C83016E_CR]	Excel Data Magic, Including Advanced PivotTables & Power Pivot	9am-5pm	Best Western Westerly	67

Coquitlam

Oct 23	[A83290B_CO]	Business Valuations – Foundations	9am-5pm	Executive Plaza	56
Oct 30	[T83000G_CO]	Income Tax – Update 2018	9am-5pm	Executive Plaza	130
Nov 01	[M83650B_CO]	Employment Law & HR Practices	9am-5pm	Executive Plaza	107
Nov 06	[A83030F_CO]	Budgeting & Financial Management: Understanding Budgeting Variance Analysis & Forecasting	9am-5pm	Executive Plaza	55
Nov 07	[C83290B_CO]	Excel: The Next Level of Skills	9am-5pm	Executive Plaza	66
Nov 08	[A82150A_CO]	IFRS – Update 2018	9am-12:30pm	Executive Plaza	38
Nov 09	[T83101D_CO]	GST/HST – Specific Topics	9am-5pm	Executive Plaza	123
Nov 14	[E82030M_CO]	Business Ethics: It Starts With You	8:30am-12:30pm	Executive Plaza	88
Nov 14	[E82030N_CO]	Business Ethics: It Starts With You	1pm-5pm	Executive Plaza	88
Nov 16	[T83220A_CO]	Corporate Tax – Tax Returns, Compliance, and Planning	9am-5pm	Executive Plaza	120
Nov 20	[A82051K_CO]	ASPE & NFPO – Update 2018	9am-12:30pm	Executive Plaza	36
Nov 20	[A81012C_CO]	Assurance & Professional Practice Update – Other than Audit	1:30pm-3:30pm	Executive Plaza	27
Nov 21	[E82011I_CO]	Code Decoded: Evolving Professional Ethical Expectations	8:30am-12:30pm	Executive Plaza	89
Nov 23	[T82012E_CO]	Income Tax - Income Splitting, A New Era	9am-12:30pm	Executive Plaza	127
Dec 10	[A82004K_CO]	Review Engagements – Specific Topics	9am-12:30pm	Executive Plaza	33
Dec 12	[C83011C_CO]	An End to Manual Effort in Excel: The Power Query Effect	9am-5pm	Executive Plaza	61
Feb 20	[E82051N_CO]	Shades of Grey: Ethics in the Workplace	8:30am-12:30pm	Executive Plaza	91
Feb 20	[E82051O_CO]	Shades of Grey: Ethics in the Workplace	1pm-5pm	Executive Plaza	91
Feb 22	[A83614F_CO]	Powerful Financial Analysis	9am-5pm	Executive Plaza	53

Fort St John

Oct 18	[T83000B_FS]	Income Tax – Update 2018	9am-5pm	Northern Grand	130
Oct 19	[E82011A_FS]	Code Decoded: Evolving Professional Ethical Expectations	8:30am-12:30pm	Northern Grand	89

Kamloops

Nov 01	[A82051F_KA]	ASPE & NFPO – Update 2018	9am-12:30pm	Wingate by Wyndham	36
Nov 01	[A82050F_KA]	Assurance Standards – Update 2018	1:30pm-5pm	Wingate by Wyndham	26
Nov 02	[A82004E_KA]	Review Engagements – Specific Topics	9am-12:30pm	Wingate by Wyndham	33
Nov 02	[A82010H_KA]	Compilation Engagements - Review of Section 9200	1:30pm-5pm	Wingate by Wyndham	30
Nov 05	[T83090C_KA]	Income Tax - Everyday Issues for General Practitioners	9am-5pm	Coast Hotel	126
Nov 14	[E82051J_KA]	Shades of Grey: Ethics in the Workplace	8:30am-12:30pm	Wingate by Wyndham	91
Nov 14	[M83650C_KA]	Employment Law & HR Practices	9am-5pm	Wingate by Wyndham	107
Nov 14	[E82051K_KA]	Shades of Grey: Ethics in the Workplace	1pm-5pm	Wingate by Wyndham	91
Nov 15	[A83030G_KA]	Budgeting & Financial Management: Understanding Budgeting Variance Analysis & Forecasting	9am-5pm	Wingate by Wyndham	55
Nov 21	[T83000S_KA]	Income Tax – Update 2018	9am-5pm	Coast Hotel	130
Nov 21	[A83082B_KA]	The Simplest Personal Finance Strategy Ever: Cash Cows, Pigs and Jackpots	9am-5pm	Coast Hotel	142
Nov 22	[T82012D_KA]	Income Tax - Income Splitting, A New Era	9am-12:30pm	Coast Hotel	127
Nov 23	[C83110D_KA]	Excel Tips, Tricks and Techniques for Accountants	9am-5pm	Coast Hotel	69

Kelowna

Oct 19	[A83330A_KE]	PSAS – Review of the Standards	9am-5pm	Coast Capri	43
Oct 22	[M83219B_KE]	Communicating Effectively Under Pressure	9am-5pm	Coast Capri	82
Oct 23	[E82011D_KE]	Code Decoded: Evolving Professional Ethical Expectations	8:30am-12:30pm	Coast Capri	89
Oct 23-24	[T84030B_KE]	Tax for Controllers	9am-5pm	Coast Capri	134
Oct 26	[A82051C_KE]	ASPE & NFPO – Update 2018	9am-12:30pm	Ramada Hotel	36
Oct 26	[A82050B_KE]	Assurance Standards – Update 2018	1:30pm-5pm	Ramada Hotel	26
Oct 29	[M83045C_KE]	Strategic Management Certificate Program – Change Management	9am-5pm	Ramada Hotel	111
Oct 30	[T83130A_KE]	Income Tax – Essentials for General Practitioners	9am-5pm	Ramada Hotel	126
Oct 30	[M83015E_KE]	Strategic Management Certificate Program – Strategic Planning	9am-5pm	Ramada Hotel	111
Nov 01	[T83000H_KE]	Income Tax – Update 2018	9am-5pm	Ramada Hotel	130
Nov 02	[A83602A_KE]	Controllership – Strategic Leadership	9am-5pm	Ramada Hotel	47
Nov 05	[A83130B_KE]	Financing Strategies	9am-5pm	Ramada Hotel	59
Nov 05	[A83320A_KE]	NFPO & Registered Charities – Accounting & Taxation	9am-5pm	Ramada Hotel	42
Nov 06	[A83570B_KE]	Faster & Better Financial Processes	9am-5pm	Ramada Hotel	49
Nov 07	[M83860C_KE]	Critical Thinking and Self Reflection	9am-5pm	Ramada Hotel	94
Nov 08	[M83640B_KE]	Empowering and Engaging Others	9am-5pm	Ramada Hotel	99
Nov 08	[T83090D_KE]	Income Tax - Everyday Issues for General Practitioners	9am-5pm	Ramada Hotel	126
Nov 09	[C83016C_KE]	Excel Data Magic, Including Advanced PivotTables & Power Pivot	9am-5pm	Ramada Hotel	67
Nov 15	[A83281B_KE]	Fraud Risk Management Principles & Practices – An Integrated Approach	9am-5pm	Coast Capri	50
Nov 16	[M83023C_KE]	Wiring Your Brain for High Impact Leadership	9am-5pm	Coast Capri	104
Nov 19	[T83220B_KE]	Corporate Tax – Tax Returns, Compliance, and Planning	9am-5pm	Coast Capri	120
Nov 21	[C83260D_KE]	Excel Financial Models and Analysis	9am-5pm	Coast Capri	68
Nov 22	[C83340E_KE]	Google is Not Enough: The Best Search Tools You Aren't Using (But Should!)	9am-5pm	Coast Capri	72
Nov 23	[A82010I_KE]	Compilation Engagements - Review of Section 9200	9am-12:30pm	Coast Capri	30
Nov 23	[A82004I_KE]	Review Engagements – Specific Topics	1:30pm-5pm	Coast Capri	33
Nov 26-27	[T84010D_KE]	Review of Corporate Tax Planning	9am-5pm	Ramada Hotel	131

Kelowna continued

Nov 28	[M83600B_KE]	A Coach Approach to Problem Solving	9am-5pm	Ramada Hotel	86
Nov 28	[A83030I_KE]	Budgeting & Financial Management: Understanding Budgeting Variance Analysis & Forecasting	9am-5pm	Ramada Hotel	55
Nov 29	[E82051L_KE]	Shades of Grey: Ethics in the Workplace	8:30am-12:30pm	Ramada Hotel	91
Nov 29	[E82051M_KE]	Shades of Grey: Ethics in the Workplace	1pm-5pm	Ramada Hotel	91
Dec 05	[A83040C_KE]	ASPE – Real Estate Industry	9am-5pm	Ramada Hotel	34
Dec 06	[A82150D_KE]	IFRS – Update 2018	9am-12:30pm	Ramada Hotel	38
Dec 07	[T83060E_KE]	Income Tax – 5 Years of Developments	9am-5pm	Coast Capri	124
Dec 10	[T83001B_KE]	Income Tax – Update 2018	9am-5pm	Coast Capri	130
Dec 11	[T82012H_KE]	Income Tax - Income Splitting, A New Era	9am-12:30pm	Coast Capri	127
Jan 17-18	[T84020B_KE]	Review of Personal Tax Planning	9am-5pm	Ramada Hotel	132
Feb 19	[A83614D_KE]	Powerful Financial Analysis	9am-5pm	Ramada Hotel	53
Feb 20	[M83650E_KE]	Employment Law & HR Practices	9am-5pm	Ramada Hotel	107

Nanaimo

Oct 24	[A83030E_NA]	Budgeting & Financial Management: Understanding Budgeting Variance Analysis & Forecasting	9am-5pm	Van Island Conf Ctr	55
Oct 25	[E82051F_NA]	Shades of Grey: Ethics in the Workplace	8:30am-12:30pm	Van Island Conf Ctr	91
Oct 25	[E82051G_NA]	Shades of Grey: Ethics in the Workplace	1pm-5pm	Van Island Conf Ctr	91
Oct 29	[A82051D_NA]	ASPE & NFPO – Update 2018	9am-12:30pm	Van Island Conf Ctr	36
Oct 29	[A82050C_NA]	Assurance Standards – Update 2018	1:30pm-5pm	Van Island Conf Ctr	26
Oct 30	[A82004C_NA]	Review Engagements – Specific Topics	9am-12:30pm	Van Island Conf Ctr	33
Oct 30	[A82005A_NA]	Quality Control - Application of CSQC1	1:30pm-5pm	Van Island Conf Ctr	31
Nov 05	[A83270A_NA]	Practical Tips for Controllers & CFOs	9am-5pm	Van Island Conf Ctr	53
Nov 08	[T83090E_NA]	Income Tax - Everyday Issues for General Practitioners	9am-5pm	Van Island Conf Ctr	126
Nov 09	[A83290F_NA]	Business Valuations – Foundations	9am-5pm	Van Island Conf Ctr	56
Nov 19	[C83340C_NA]	Google is Not Enough: The Best Search Tools You Aren't Using (But Should!)	9am-5pm	Van Island Conf Ctr	72
Nov 20	[T83000R_NA]	Income Tax – Update 2018	9am-5pm	Best Western Dorchester	130
Nov 21	[T82012C_NA]	Income Tax - Income Splitting, A New Era	9am-12:30pm	Best Western Dorchester	127
Nov 23	[M83219G_NA]	Communicating Effectively Under Pressure	9am-5pm	Best Western Dorchester	82
Nov 27	[C83110E_NA]	Excel Tips, Tricks and Techniques for Accountants	9am-5pm	Van Island Conf Ctr	69
Mar 05	[M83650F_NA]	Employment Law & HR Practices	9am-5pm	Van Island Conf Ctr	107

Parksville

Oct 19	[A82051A_PA]	ASPE & NFPO – Update 2018	9am-12:30pm	Quality Bayside	36
Oct 19	[A82010E_PA]	Compilation Engagements - Review of Section 9200	1:30pm-5pm	Quality Bayside	30
Oct 29	[M83652B_PA]	Tools for Communicating with Difficult People	9am-5pm	Quality Bayside	85
Oct 30	[A83290D_PA]	Business Valuations – Foundations	9am-5pm	Quality Bayside	56
Oct 31	[A82004D_PA]	Review Engagements – Specific Topics	9am-12:30pm	Quality Bayside	33
Oct 31	[A82050E_PA]	Assurance Standards – Update 2018	1:30pm-5pm	Quality Bayside	26
Nov 01	[T83000I_PA]	Income Tax – Update 2018	9am-5pm	Quality Bayside	130
Nov 02	[T83060A_PA]	Income Tax – 5 Years of Developments	9am-5pm	Quality Bayside	124
Nov 06	[E82011F_PA]	Coded Decoded: Evolving Professional Ethical Expectations	8:30am-12:30pm	Quality Bayside	89

Prince George

Oct 22	[A82051B_PG]	ASPE & NFPO – Update 2018	9am-12:30pm	Ramada Hotel	36
Oct 22	[A82050A_PG]	Assurance Standards – Update 2018	1:30pm-5pm	Ramada Hotel	26
Oct 23	[A82004B_PG]	Review Engagements – Specific Topics	9am-12:30pm	Ramada Hotel	33
Oct 29	[A83290C_PG]	Business Valuations – Foundations	9am-5pm	Ramada Hotel	56
Oct 30	[M83480C_PG]	Leadership and Coaching	9am-5pm	Ramada Hotel	101
Oct 31	[E82030I_PG]	Business Ethics: It Starts With You	8:30am-12:30pm	Ramada Hotel	88
Oct 31	[E82030J_PG]	Business Ethics: It Starts With You	1pm-5pm	Ramada Hotel	88
Nov 06	[M83219E_PG]	Communicating Effectively Under Pressure	9am-5pm	Ramada Hotel	82
Nov 09	[T83090F_PG]	Income Tax - Everyday Issues for General Practitioners	9am-5pm	Ramada Hotel	126
Nov 14	[T83101E_PG]	GST/HST – Specific Topics	9am-5pm	Ramada Hotel	123
Nov 15	[A83602B_PG]	Controllership – Strategic Leadership	9am-5pm	Ramada Hotel	47
Nov 19	[T83000Q_PG]	Income Tax – Update 2018	9am-5pm	Ramada Hotel	130
Nov 20	[T82012B_PG]	Income Tax - Income Splitting, A New Era	9am-12:30pm	Ramada Hotel	127
Nov 20	[A83340D_PG]	Unveiling the Retirement Myth	9am-5pm	Ramada Hotel	143
Nov 21	[C83380D_PG]	Advanced Data Magic with Excel	9am-5pm	Ramada Hotel	60

Richmond

Nov 05	[A82051H_RI]	ASPE & NFPO – Update 2018	9am-12:30pm	Executive Airport	36
Nov 05	[T83000K_RI]	Income Tax – Update 2018	9am-5pm	Executive Airport	130
Nov 16	[E82011H_RI]	Code Decoded: Evolving Professional Ethical Expectations	8:30am-12:30pm	Executive Airport	89
Dec 12	[E82030O_RI]	Business Ethics: It Starts With You	8:30am-12:30pm	Executive Airport	88
Dec 12	[E82030P_RI]	Business Ethics: It Starts With You	1pm-5pm	Executive Airport	88
Feb 21	[E82051P_RI]	Shades of Grey: Ethics in the Workplace	8:30am-12:30pm	Executive Airport	91
Feb 21	[E82051Q_RI]	Shades of Grey: Ethics in the Workplace	1pm-5pm	Executive Airport	91

Surrey

Oct 18	[A82010D_SU]	Compilation Engagements - Review of Section 9200	9am-12:30pm	Sheraton Guildford	30
Oct 22	[A82004A_SU]	Review Engagements – Specific Topics	9am-12:30pm	Sheraton Guildford	33
Oct 25	[T83000D_SU]	Income Tax – Update 2018	9am-5pm	Sheraton Guildford	130
Oct 26	[T83101B_SU]	GST/HST – Specific Topics	9am-5pm	Sheraton Guildford	123
Oct 26	[A83614C_SU]	Powerful Financial Analysis	9am-5pm	Sheraton Guildford	53
Nov 06	[T83041B_SU]	Corporate Tax – Small Business Deduction & Related Tax	9am-5pm	Civic Hotel	118
Nov 07	[A82051J_SU]	ASPE & NFPO – Update 2018	9am-12:30pm	Comfort Inn	36
Nov 07	[A82050H_SU]	Assurance Standards – Update 2018	1:30pm-5pm	Comfort Inn	26
Nov 07	[T82021B_SU]	Corporate Tax - RDTOH, CDA & Other Tax Accounts	9am-12:30pm	Civic Hotel	117
Nov 08	[E82052C_SU]	Becoming an Ethical Leader	8:30am-12:30pm	Civic Hotel	88
Nov 08	[E82052D_SU]	Becoming an Ethical Leader	1pm-5pm	Civic Hotel	88
Nov 09	[A83280A_SU]	Fraud Happens – What to do When You Suspect Fraud	9am-5pm	Civic Hotel	30
Nov 16	[A83145B_SU]	Starting a Successful CPA Practice	9am-5pm	Sheraton Guildford	105
Nov 19	[T83090G_SU]	Income Tax - Everyday Issues for General Practitioners	9am-5pm	Sheraton Guildford	126
Nov 20	[E82060B_SU]	Ethics at our Core	8:30am-12:30pm	Sheraton Guildford	89
Nov 20	[C83340D_SU]	Google is Not Enough: The Best Search Tools You Aren't Using (But Should!)	9am-5pm	Sheraton Guildford	72
Nov 20	[T83060C_SU]	Income Tax – 5 Years of Developments	9am-5pm	Sheraton Guildford	124
Nov 23	[A83050B_SU]	ASPE – Disclosure and Presentation	9am-5pm	Sheraton Guildford	34
Nov 23	[A83072B_SU]	Enough Bull: How to Retire Well Without the Stock Market	9am-5pm	Sheraton Guildford	138
Nov 26	[M83219H_SU]	Communicating Effectively Under Pressure	9am-5pm	Sheraton Guildford	82

Surrey continued

Nov 26	[A83602E_SU]	Controllership – Strategic Leadership	9am-5pm	Sheraton Guildford	47
Nov 27	[T83040A_SU]	Advanced Tax Planning Strategies	9am-5pm	Sheraton Guildford	113
Nov 27	[M83650D_SU]	Employment Law & HR Practices	9am-5pm	Sheraton Guildford	107
Nov 28	[M83243C_SU]	Coach Yourself First	9am-5pm	Sheraton Guildford	93
Nov 28	[T83130B_SU]	Income Tax – Essentials for General Practitioners	9am-5pm	Sheraton Guildford	126
Nov 29	[M83860E_SU]	Critical Thinking and Self Reflection	9am-5pm	Sheraton Guildford	94
Nov 29	[A83004A_SU]	Management Accounting – Foundations	9am-5pm	Sheraton Guildford	52
Nov 30	[T83220D_SU]	Corporate Tax – Tax Returns, Compliance, and Planning	9am-5pm	Sheraton Guildford	120
Nov 30	[T83000W_SU]	Income Tax – Update 2018	9am-5pm	Sheraton Guildford	130
Dec 04	[C83290D_SU]	Excel: The Next Level of Skills	9am-5pm	Sheraton Guildford	66
Dec 05	[E82011L_SU]	Code Decoded: Evolving Professional Ethical Expectations	8:30am-12:30pm	Sheraton Guildford	89
Dec 05	[M83023E_SU]	Wiring Your Brain for High Impact Leadership	9am-5pm	Sheraton Guildford	104
Dec 07	[A83222G_SU]	Review Engagements – Application of the New Standards	9am-5pm	Sheraton Guildford	32
Dec 11	[A83030J_SU]	Budgeting & Financial Management: Understanding Budgeting Variance Analysis & Forecasting	9am-5pm	Sheraton Guildford	55
Dec 13	[A83612D_SU]	Interpreting Financial Statements	9am-5pm	Sheraton Guildford	52
Dec 14	[T83001E_SU]	Income Tax – Update 2018	9am-5pm	Sheraton Guildford	130
Jan 28	[T82012I_SU]	Income Tax - Income Splitting, A New Era	9am-12:30pm	Sheraton Guildford	127
Feb 06-07	[T84020D_SU]	Review of Personal Tax Planning	9am-5pm	Sheraton Guildford	132
Feb 15	[E82011O_SU]	Code Decoded: Evolving Professional Ethical Expectations	8:30am-12:30pm	Sheraton Guildford	89
Feb 21	[M83652D_SU]	Tools for Communicating with Difficult People	9am-5pm	Sheraton Guildford	85
Mar 06	[C82004B_SU]	Research Automation Tools for Accountants	9am-12:30pm	Sheraton Guildford	76
Mar 06	[C82005C_SU]	Blockchain for Accountants	1:30pm-5pm	Sheraton Guildford	62
Mar 14	[C83016G_SU]	Excel Data Magic, Including Advanced PivotTables & Power Pivot	9am-5pm	Sheraton Guildford	67
Mar 15	[C83110F_SU]	Excel Tips, Tricks and Techniques for Accountants	9am-5pm	Sheraton Guildford	69

Terrace

Oct 24	[E82011B_TE]	Code Decoded: Evolving Professional Ethical Expectations	1pm-5pm	Best Western Terrace Inn	89
Oct 25	[T83000E_TE]	Income Tax – Update 2018	9am-5pm	Best Western Terrace Inn	130
Oct 26	[M83219D_TE]	Communicating Effectively Under Pressure	9am-5pm	Best Western Terrace Inn	82
Nov 05	[C83016A_TE]	Excel Data Magic, Including Advanced PivotTables & Power Pivot	9am-5pm	Best Western Terrace Inn	67
Nov 06	[A83290E_TE]	Business Valuations – Foundations	9am-5pm	Best Western Terrace Inn	56

Victoria

Oct 19	[T83000C_VI]	Income Tax – Update 2018	9am-5pm	Marriott Inner Harbour	130
Oct 22	[T83101A_VI]	GST/HST – Specific Topics	9am-5pm	Victoria Conf Ctr	123
Oct 22	[A83133A_VI]	Treasury & Finance for Accountants	9am-5pm	Victoria Conf Ctr	59
Oct 23	[M83640A_VI]	Empowering and Engaging Others	9am-5pm	Victoria Conf Ctr	99
Oct 23	[A83614B_VI]	Powerful Financial Analysis	9am-5pm	Victoria Conf Ctr	53
Oct 24	[E82030G_VI]	Business Ethics: It Starts With You	8:30am-12:30pm	Victoria Conf Ctr	88
Oct 24	[M83219C_VI]	Communicating Effectively Under Pressure	9am-5pm	Victoria Conf Ctr	82
Oct 24	[E82030H_VI]	Business Ethics: It Starts With You	1pm-5pm	Victoria Conf Ctr	88
Oct 25	[M83025C_VI]	Strategic Management Certificate Program – Risk Management and Governance	9am-5pm	Victoria Conf Ctr	111
Oct 26	[T83090B_VI]	Income Tax - Everyday Issues for General Practitioners	9am-5pm	Victoria Conf Ctr	126
Oct 29	[C83340B_VI]	Google is Not Enough: The Best Search Tools You Aren't Using (But Should!)	9am-5pm	Marriott Inner Harbour	72
Oct 30	[C82005B_VI]	Blockchain for Accountants	9am-12:30pm	Marriott Inner Harbour	62
Nov 02	[A82051G_VI]	ASPE & NFPO – Update 2018	9am-12:30pm	Delta Ocean Pointe	36
Nov 02	[A82050G_VI]	Assurance Standards – Update 2018	1:30pm-5pm	Delta Ocean Pointe	26
Nov 06	[A83320B_VI]	NFPO & Registered Charities – Accounting & Taxation	9am-5pm	Marriott Inner Harbour	42
Nov 06	[A83270B_VI]	Practical Tips for Controllers & CFOs	9am-5pm	Marriott Inner Harbour	53
Nov 07	[A83330B_VI]	PSAS – Review of the Standards	9am-5pm	Marriott Inner Harbour	43
Nov 07	[T83110A_VI]	RIP – Estate Planning	9am-5pm	Marriott Inner Harbour	133
Nov 08	[T83170A_VI]	Corporate Restructuring – Fundamentals	9am-5pm	Marriott Inner Harbour	115
Nov 08	[A83203B_VI]	The Procrastinator's Guide to Retirement	9am-5pm	Marriott Inner Harbour	141
Nov 09	[C83290C_VI]	Excel: The Next Level of Skills	9am-5pm	Marriott Inner Harbour	66
Nov 13	[T83000N_VI]	Income Tax – Update 2018	9am-5pm	Marriott Inner Harbour	130
Nov 14	[T83260A_VI]	Personal Tax – Tax Returns, Compliance, and Planning	9am-5pm	Delta Ocean Pointe	130
Nov 14-15	[T84030C_VI]	Tax for Controllers	9am-5pm	Marriott Inner Harbour	134
Nov 16	[A83080B_VI]	Corporate Treasury Management	9am-5pm	Marriott Inner Harbour	58
Nov 16	[A82004H_VI]	Review Engagements – Specific Topics	9am-12:30pm	Marriott Inner Harbour	33
Nov 16	[C83260C_VI]	Excel Financial Models and Analysis	9am-5pm	Marriott Inner Harbour	68
Nov 16	[A82150C_VI]	IFRS – Update 2018	1:30pm-5pm	Marriott Inner Harbour	38
Nov 19	[T82012A_VI]	Income Tax - Income Splitting, A New Era	1:30pm-5pm	Marriott Inner Harbour	127
Nov 20	[M83490C_VI]	Becoming a Skilled Negotiator	9am-5pm	Delta Ocean Pointe	80
Nov 20	[M83150F_VI]	Clear Thinking/Clear Speaking	9am-5pm	Delta Ocean Pointe	81
Nov 20	[T83060D_VI]	Income Tax – 5 Years of Developments	9am-5pm	Marriott Inner Harbour	124
Nov 21	[E82011J_VI]	Code Decoded: Evolving Professional Ethical Expectations	8:30am-12:30pm	Marriott Inner Harbour	89
Nov 22	[A83601B_VI]	Controllership – Operational Management	9am-5pm	Marriott Inner Harbour	46
Nov 23	[A83602D_VI]	Controllership – Strategic Leadership	9am-5pm	Marriott Inner Harbour	47
Nov 23	[T83220C_VI]	Corporate Tax – Tax Returns, Compliance, and Planning	9am-5pm	Marriott Inner Harbour	120
Nov 26	[M83360C_VI]	Effective & Essential Management Skills	9am-5pm	Victoria Conf Ctr	98
Nov 27	[A83290H_VI]	Business Valuations – Foundations	9am-5pm	Victoria Conf Ctr	56
Nov 27	[M83045E_VI]	Strategic Management Certificate Program – Change Management	9am-5pm	Victoria Conf Ctr	111
Nov 28	[A83010B_VI]	Business Valuations – Advanced	9am-5pm	Victoria Conf Ctr	56
Nov 28	[A83280B_VI]	Fraud Happens – What to do When You Suspect Fraud	9am-5pm	Victoria Conf Ctr	30
Nov 29	[M82100B_VI]	Corporate Governance Essentials	9am-12:30pm	Victoria Conf Ctr	107
Nov 29	[M82080B_VI]	Risk Management Essentials	1:30pm-5pm	Victoria Conf Ctr	108
Nov 29	[T83180E_VI]	Income Tax – Real Estate	9am-5pm	Victoria Conf Ctr	129
Nov 30	[T82024B_VI]	Corporate Tax – Section 55 How Safe are Your Dividends?	9am-12:30pm	Victoria Conf Ctr	117
Nov 30	[T82050B_VI]	Corporate Restructuring – Practical Applications	1:30pm-5pm	Victoria Conf Ctr	115

Victoria continued

Nov 30	[A83332B_VI]	PSAS – Specific Topics	9am-5pm	Victoria Conf Ctr	44
Dec 04-05	[T84010E_VI]	Review of Corporate Tax Planning	9am-5pm	Marriott Inner Harbour	131
Dec 05	[M83600C_VI]	A Coach Approach to Problem Solving	9am-5pm	Marriott Inner Harbour	86
Dec 06	[M83035E_VI]	Strategic Management Certificate Program – Team Development	9am-5pm	Marriott Inner Harbour	111
Dec 07	[M83015F_VI]	Strategic Management Certificate Program – Strategic Planning	9am-5pm	Marriott Inner Harbour	111
Dec 10	[C83011B_VI]	An End to Manual Effort in Excel: The Power Query Effect	9am-5pm	Marriott Inner Harbour	61
Dec 11	[M82140A_VI]	Workplace Law: All You Wanted to Know About and Were Afraid to Ask	9am-12:30pm	Marriott Inner Harbour	110
Dec 13	[C83016F_VI]	Excel Data Magic, Including Advanced PivotTables & Power Pivot	9am-5pm	Marriott Inner Harbour	67
Dec 14	[C82130C_VI]	Technology Update	9am-12:30pm	Marriott Inner Harbour	77
Dec 14	[C82040B_VI]	Excel Macros Demystified	1:30pm-5pm	Marriott Inner Harbour	68
Jan 22	[T83001H_VI]	Income Tax – Update 2018	9am-5pm	Marriott Inner Harbour	130
Jan 25	[A83009B_VI]	Business Valuations – Purchase Price Allocations	9am-5pm	Marriott Inner Harbour	57
Feb 12	[A83222I_VI]	Review Engagements: Application of the New Standards	9am-5pm	Marriott Inner Harbour	32
Feb 13	[A82051N_VI]	ASPE & NFPO: 2018	9am-12:30pm	Marriott Inner Harbour	31
Feb 13	[A82005C_VI]	Quality Control - Application of CSQC1	1:30pm-5pm	Marriott Inner Harbour	30
Feb 21	[E82011P_VI]	Code Decoded: Evolving Professional Ethical Expectations	8:30am-12:30pm	Marriott Inner Harbour	89

How to register

- On our secure website at pd.bccpa.ca
- By phone 604 872.7222 (ask for the PD Department)
- By email to pdreg@bccpa.ca (only for registrations with no credit card payments – please do not include credit card information by email)
- By mail to the CPABC 800-555 West Hastings Street, Vancouver, BC V6B 4N6 (Registration form on page 172)

Our Fall/Winter program includes seminars until the middle of March. Our Spring/Summer 2019 PD catalogue will be available in March, and will include seminars from May 2019 to August 2019.

Seminar Venues

Abbotsford
Quality Hotel & Conference Centre — Tel 604 870.1050
36035 North Parallel Road — www.qualityhotelabbotsford.com

Burnaby
Executive Hotel Burnaby — Tel 604 298.2010
4201 Lougheed Highway — www.executivehotels.net

Coquitlam
Executive Plaza Hotel — Tel 604 433.3932
405 North Road — www.executivehotels.net

Courtenay
Best Western Westerly Hotel — Tel 250 338.7741
1590 Cliffe Avenue — www.thewesterlyhotel.ca

Fort St. John
Northern Grand Hotel — Tel 250 787.6521
9830 100th Avenue — www.northerngrand.com

Kamloops
Coast Kamloops Hotel & Convention Centre — Tel 250 828.6660
1250 Rogers Way — www.coasthotels.com

Wingate by Wyndham — Tel 778 731.0376
1180 Rogers Way — www.wyndhamhotels.com

Kelowna
Coast Capri Hotel — Tel 250 860.6060
1171 Harvey Avenue — www.coastcaprihotel.com

Delta Grand Okanagan Resort — Tel 250 763.4500
1310 Water Street — www.marriott.com/hotels/travel/ylwok

Ramada Hotel & Conference Centre — Tel 250 860.9711
2170 Harvey Avenue — www.ramadalodgehotelkelowna.com

Nanaimo
Best Western Dorchester — Tel 250 754.6835
70 Church Street — www.dorchesternanaimo.com

Vancouver Island Conference Centre — Tel 250 244-4050
101 Gordon Street — www.viconference.com

Parksville
Quality Resort Bayside — Tel 250 248.8333
240 Dogwood Street — www.qualityresortparksville.com

Prince George
Ramada Prince George — Tel 250 563.0055
444 George Street — www.ramadaprincegeorge.com

Richmond
Executive Airport Plaza Hotel — Tel 604 278.5555
7311 Westminster Highway — www.executivehotels.net

Surrey
Civic Hotel — Tel 855 255.8933
13457 Central Avenue — www.civichotel.ca

Comfort Inn & Suites — Tel 604 576.8888
8255 – 166th Street — www.comfortinnsurrey.com

Sheraton Guildford Hotel — Tel 604 582.9288
15269 – 104th Avenue — www.sheratonguildford.com

Terrace
Best Western Terrace Inn — Tel 250 635.0083
4553 Greig Avenue — www.bestwestern.com

Victoria
Delta Victoria Ocean Pointe — Tel 250 360.2999
100 Harbour Road — www.marriott.com/hotels/travel/yyjvo

Victoria Marriott Inner Harbour Hotel — Tel 250 480.3800
728 Humboldt Street — www.marriottvictoria.com

Westin Bear Mountain Resort — Tel 250 391.7160
1999 Country Club Way — www.westin.com/bearmountain

Vancouver
Four Seasons Hotel — Tel 604 689.9333
791 West Georgia Street — www.fourseasons.com/vancouver

Hyatt Regency — Tel 604 683.1234
655 Burrard Street — vancouver.hyatt.com

Sutton Place Hotel — Tel 604 682.5511
845 Burrard Street — www.suttonplace.com/vancouver

UBC Robson Square — Tel 604 822.3333
800 Robson Street — Robsonsquare.ubc.ca

Vancouver Convention Centre East — Tel 604 689.8232
999 Canada Place (2nd floor) — www.vancouverconventioncentre.com

Vancouver Convention Centre West — Tel 604 689.8232
1055 Canada Place — www.vancouverconventioncentre.com

Whistler
Delta Whistler Village Suites — Tel 604 905.3987
4308 Main Street — www.marriott.com/hotels/travel/ysewv

Westin Whistler Resort — Tel 604 905.5000
4090 Whistler Way — www.westinwhistler.com

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The Personal and Flexi PD Passports are savings programs for members and other professionals taking multiple professional development seminars throughout the year. For the price of a PD Passport, you are entitled to register for 6 days of PD Passport Valid seminars between September 1, 2018 and August 31, 2019 at no extra cost. You can mix and match executive breakfasts/briefs (three breakfasts/briefs are equal to 1 day), half-day, one-day, and two-day seminars to equal 6 days of PD training – potentially saving you up to 40% off seminar prices.

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- economical way to meet your CPD reporting requirements – one PD Passport straddles two CPD reporting years
- budget educational activities for the coming year conveniently
- explore new areas of practice at a fraction of the price
- eligible for our web-based seminars as well

NOTE: CPABC PD seminars that are not PD Passport Valid will be clearly marked "PD Passport invalid".

Personal & Flexi PD Passports can be used for Online Seminars & PD AudioWeb titles

We know that some of our members face challenges in attending traditional classroom seminars. We offer these members a way to continue their professional education in a cost effective manner by offering a selection of web-based seminars. These "to go" sessions allow you to learn what you want, where you want, and at the pace and in the amount of detail you choose.

Our web-based seminars are eligible for Verifiable CPD Hours – in order to claim those hours as verifiable, you will be required to successfully complete a short quiz or answer polling questions. See pages 152-161 for a selection of titles.

To order your passport

You can go to our website at pd.bccpa.ca to make your online purchase or email pdreg@bccpa.ca for more information.

IN-HOUSE PRESENTATIONS | TAILORED TO YOUR NEEDS

CPABC PD In-House Presentation Services

Our customized training program is growing every year. CPABC realizes that members work in diverse roles and industries, and that seminars tailored and relevant to you are sometimes difficult to locate.

Possible seminar topics

- Accounting and assurance
- Taxation
- Wealth management
- Leadership and team building
- Personal development
- Information and business technology
- Ethics

Our instructors can work with you to customize the seminars to focus on your specific needs.

Contact us to find out how bringing a class to you makes sense to your business.
Email: *pdreg@bccpa.ca*

Why use our in-house services?

It's Flexible!

This is your program. It is designed to work around your schedule, which we know can be hectic. We bring the instructor to the location of your choosing, around the schedule you decide works best for your audience.

It's Customized and Confidential!

We can discuss your requirements and expectations in detail. CPABC, in collaboration with CPA Canada, can either customize an existing seminar or create a seminar specifically for you. You decide who you want in your classroom - your employees, your peers, your clients, your study group, or anyone with common learning goals. When you control who is in attendance, you are able to discuss issues freely, and feel safe to ask questions.

It's Cost Effective!

Costs vary depending on the size of your group and how much customization is required. The per-person cost is typically less than attending an off-site seminar. Also, by eliminating travel time and travel expenses for your staff, you can significantly decrease training costs.

It's Easy!

We will find and secure the right instructor for your needs, and will also supply the seminar materials. We can assist with booking meeting facilities if you do not have room at your location. We work with many independent instructors nationwide, and have an exceptional pool of local and national instructors to draw from.

Other benefits

- is great for team-building and achieving organizational results
- provides attendees more interaction with the instructor

Call today to find out how bringing a class on site makes sense to your business. Contact Nicola McLaren, CPA, CA or Kitty Leung at 604 872.7222, toll free in BC at 1 800 663.2677, or email pdreg@bccpa.ca.

Here are what some of our in-house customers have to say:

With the growing number of employees in our finance department who require professional development, we decided to look at CPABC's in-house seminar offerings to align training and development for all our team members. This gave us an opportunity to not only provide training for those who require PD points but also for the rest of team. Our first session was received very well by our team and we will definitely consider this again for the future.

Helena Ng, Finance Coordinator
E-Comm 911, Vancouver, BC

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

In-house presentation of PD Program course material provided us with: well prepared material; customization to emphasize areas of particular interest; very knowledgeable instructors; and an economic delivery model that enabled us to include more staff in the learning experience.

Larry Guthrie, Director, Financial Services
Simon Fraser University, Burnaby, BC

With the convenience of in-house PD, we're able to have more accounting team attend PD, by including team members that wouldn't normally attend if it were out of town. Our team like it because they are more comfortable asking questions and discussing issues specific to our clients. I think we get more out of the PD because of the discussions that result from those questions. It's also more convenient to have the course under our roof and to not have to go elsewhere for it. We definitely get more value out of in-house PD courses.

Brenda Kelm, Partner
Presley and Partners, Courtenay, BC

One of Avisar's objectives is to provide a work environment that is conducive to both personal and professional growth. Greg Campeau was the key person for Avisar's 2-day offsite CPABC in-house seminar "Leading from Anywhere in the Organization." He executive on all the deliverables we worked on together to ensure a well-rounded interactive workshop to our leadership group and entire team. Of particular value to us was that the material resonated with us – leadership is everyone's job – serving people is the highest form of performance.

Cheryl Hipwell, Office Manager
Avisar, Langley, BC

Continuing Professional Development (CPD) Reporting Requirements for CPABC Members

Members are reminded of Rule 203 of the Code of Professional Conduct.

Rule 203 – Professional Competence

A member shall sustain professional competence by keeping informed of, and complying with, developments in professional standards in all functions in which the member provides professional services or is relied upon because of the member's calling.

MINIMUM CPD REQUIREMENTS

Minimum Requirements	Verifiable Hours	Additional Hours	Total Hours
Annual	10	10	20
3-Year Rolling Cycle, including 4 hours of verifiable business ethics	60	60	120

**Additional hours required can be fulfilled with verifiable or unverifiable hours.*

- **Verifiable CPD** includes learning activities, relevant to your professional role, for which there is satisfactory evidence to objectively verify participation in the learning activity.
- **Unverifiable CPD** includes personal reading, on-the-job learning and other 'self-study' activities relevant to your professional role for which there is no evidence to verify participation in the learning activity.
- **Verifiable Professional Ethics CPD** includes learning activities that specifically address professional ethics matters, for which there is satisfactory evidence to objectively verify participation in the learning activity.

Verifiable Professional Ethics CPD

Members must report a minimum of 4 hours of verifiable professional ethics as part of their 60 verifiable hour requirement in each rolling three-calendar year period. The 4-hours can be obtained in a single program or can accumulate through various separate activities over the three years. For additional information please refer to our website at www.bccpa.ca/cpd-ethics-requirement.

CPD Reporting

CPD reports are due by January 31 for the previous calendar year. You can log your CPD activities on-line throughout the year as you undertake them. Failure to complete and report CPD requirements on a timely basis, will result in a $200 late reporting administrative fee and the suspension and/or cancellation of membership.

CPD Audit

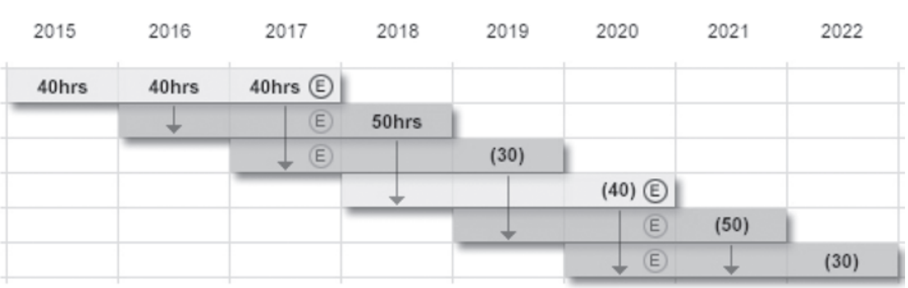
It is important for you to keep supporting records of your CPD activities for five years after the end of the annual reporting period, as we audit a sample of members each year for the preceding three-years. You do not need to submit the supporting records unless requested.

CPD Sources

CPD does not have to be taken through CPABC - it does not even have to be taken in Canada. CPD may be completed through any learning institution, organization and/or an employer. CPD is not restricted to traditional accounting topics - consider taking leadership courses or courses related to your industry. CPD just has to be relevant to your particular employment or professional role, business situation, or career aspirations.

Example - How the Rolling Three-Calendar Year Period Works

The example provided references total CPD hours, but can also be applied to verifiable CPD hours



E – Denotes verifiable business ethics

1. In the first rolling three-year period of 2015-2017, the member completed 40 hours of CPD each year.
2. In 2018, the member completed 50 hours of CPD, for a total of 130 CPD hours for the 2016-2018 three-year period.
3. In 2019, to meet the requisite 120 hours for the 2017-2019 rolling three-year period, the member will need to complete a minimum of 30 hours of CPD. Assume that the member only completes the minimum 30 hours of CPD in 2019.
4. In 2020, to meet the requisite 120 hours for the 2018-2020 rolling three-year period, the member will need to complete a minimum of 40 hours of CPD. And so on.
5. A member who met the verifiable professional ethics requirement in 2017 and did not complete any professional ethics CPD in 2018 or 2019 would need to meet the requirement again in 2020, and so on. Members are required to complete 4 hours of professional ethics in every rolling three- year period.

Additional Information

For further information, please refer to our website at **www.bccpa.ca,** or contact Lisa Murray, CPD Administrator or Robert Bansal, CPA, CMA, Membership Registration Manager, at **cpd@bccpa.ca**

Accounting & Assurance

Audit & Assurance

Financial Reporting

Management Accounting & Financial Management

TITLE STATUS
NEW

Assurance – Compliance with Agreements, Statutes and Regulations (New CSAE 3530 and 3531)

LEVEL Intermediate

Prerequisite
Familiarity with *CPA Handbook – Assurance*.

Overview
Effective for compliance reports dated on or after April 1, 2019, the relevant assurance standards will change. This seminar will provide an overview of the new standards, CSAE 3530 Special Considerations. Attestation Engagements to Report on Compliance and CSAE 3531 Special Considerations – Direct Engagements to Report on Compliance. Reports that will be impacted by these standards include

- compliance with debt covenants in a banking agreement
- compliance with the terms of a lease arrangement
- compliance with financial reporting requirements of a not-for-profit funding arrangement and
- compliance with non-financial requirements for a public sector organization

Who Should Attend
Practitioners who have previously issued 5815 Auditor's Reports on Compliance with Agreements, Statutes and Regulations, 8600 Reviews of Compliance with Agreements and Regulations, PS 5300 Auditing for Compliance with Legislative and Related Authorities in the Public Sector and practitioners expecting to issue a compliance report in the future.

Content
This course will highlight the changes in procedural requirements and the wording of the new reports, including:

- explaining the difference between CSAE 3530 and 3531 and integration with CSAE 3000 and 3001
- understanding the differences in practical application for both compliance audits and compliance reviews
- writing the new report

Seminar Leader
Diane McDonald, CPA, CA

Dec 10	1:30pm-5pm	Van Conv Ctr West, Vancouver	[A82018A_VA]
Feb 15	9am-12:30pm	Sutton Place, Vancouver	[A82018B_VA]
Fee $225	PD Passport Valid	1/2 Passport Day	3.5 CPD Hours

TITLE STATUS
UPDATED

Assurance Standards – Update 2018

(formerly Assurance & Professional Practice Update)

LEVEL Intermediate

Prerequisite
Familiarity with *CPA Handbook – Assurance*.

Overview
This seminar is designed to review recent revisions to the *CPA Canada Handbook–Assurance* and other practice matters. It will focus on new auditing standards issued, with an overview of projects in progress, and other issues such as auditing accounting estimates and other developments of interest to auditors, and will also review audit practice issues identified by practice advisory and/or practice inspection. It will also focus on new developments for review engagements and compilations, with an overview of projects in progress. Related practice issues identified by practice advisory and/or practice inspection will also be reviewed, particularly with respect to the application and reporting under CSRE 2400 Review Engagements.

Who Should Attend
Practitioners who practice public accounting, serving small and medium-sized entities.

Practitioners who do not do audits should consider attending the two-hour seminar *Assurance & Professional Practice Update – Other than Audit* instead. Practitioners who only do audits should consider attending *Assurance & Professional Practice Update – Just for Auditors*.

Content
- introduction and overview of new standards issued
- specific coverage of the new audit report
- exposure drafts and other projects in process for audit
- practice matters, including practice inspection findings and practice advisory comments for auditors
- awareness of tools available to assist auditors
- follow-up of implementation and application of CSRE 2400
- exposure drafts and other projects in process for compilations and other services
- practice matters, including practice inspection findings and practice advisory comments on review engagements and compilations

Seminar Leader to be drawn from
Tom Gillespie, CPA, CA
Diane McDonald, CPA, CA
Terry Gunderson, CPA, CA
Bridget Noonan, CPA, CA

Oct 22	1:30pm-5pm	Ramada Hotel, Prince George	[A82050A_PG]
Oct 26	1:30pm-5pm	Ramada Hotel, Kelowna	[A82050B_KE]
Oct 29	1:30pm-5pm	Van Island Conf Ctr, Nanaimo	[A82050C_NA]
Oct 30	1:30pm-5pm	Sutton Place, Vancouver	[A82050D_VA]
Oct 31	1:30pm-5pm	Quality Bayside, Parksville	[A82050E_PA]
Nov 01	1:30pm-5pm	Wingate, Kamloops	[A82050F_KA]
Nov 02	1:30pm-5pm	Delta Ocean Pointe, Victoria	[A82050G_VI]
Nov 07	1:30pm-5pm	Comfort Inn, Surrey	[A82050H_SU]
Fee $225	PD Passport Valid	1/2 Passport Day	3.5 CPD Hours

TITLE STATUS

NEW

Assurance & Professional Practice Update – Just for Auditors

LEVEL Intermediate

Prerequisite

Familiarity with *CPA Handbook – Assurance*.

Overview

This seminar is designed to review recent revisions to the *CPA Handbook – Assurance* and other practice matters specifically for auditors and only auditors. The focus of the seminar is on new auditing standards issued, with an overview of projects in progress, and other issues such as auditing accounting estimates and other developments of interest to auditors. Audit practice issues identified by practice advisory and/or practice inspection will also be reviewed.

Who Should Attend

Professional accountants who audit small and medium-sized entities.

This session will not address review engagements or compilations – for these service areas, practitioners should attend either *Assurance & Professional Practice Update – Other than Audit*, or the half-day seminar *Assurance Standards – Update 2018* (which will cover both areas).

Content

- introduction and overview of new standards issued
- specific coverage of the new audit report
- exposure drafts and other projects in process for audit
- practice matters, including practice inspection findings and practice advisory comments for auditors
- awareness of tools available to assist auditors

Seminar Leader

Diane McDonald, CPA, CA

Nov 13	10:30am-12:30pm	Sutton Place, Vancouver	[A81022A_VA]
Feb 06	10:30am-12:30pm	Sutton Place, Vancouver	[A81022B_VA]
Fee $130	PD Passport Valid	1/3 Passport Day	2 CPD Hours

TITLE STATUS

NEW

Assurance & Professional Practice Update – Other than Audit

LEVEL Intermediate

Prerequisite

Familiarity with *CPA Handbook – Assurance*.

Overview

This seminar is designed to review recent revisions to the *CPA Handbook – Assurance* and other practice matters for practitioners who perform review and compilation engagements. The focus of the seminar is on new developments for review engagements and compilations, with an overview of projects in progress. Related practice issues identified by practice advisory and/or practice inspection will also be reviewed, particularly with respect to the application and reporting under CSRE 2400 Review Engagements.

Who Should Attend

Practitioners who perform review engagements and compilations of small and medium-sized entities that are private or not-for-profit entities. This seminar provides an overview of current developments in other-than-audit standards.

This session will not address audits – practitioners who do audits should consider attending *Assurance & Professional Practice Update – Just for Auditors*, or the half-day seminar *Assurance Standards – Update 2018* (which will cover both areas).

Content

- introduction and overview of new standards issued
- follow-up of implementation and application of CSRE 2400
- exposure drafts and other projects in process for compilations and other services
- practice matters, including practice inspection findings and practice advisory comments on review engagements and compilations

Seminar Leader to be drawn from

Terry Gunderson, CPA, CA
Diane McDonald, CPA, CA

Nov 07	1:30pm-3:30pm	Quality Hotel, Abbotsford	[A81012A_AB]
Nov 13	8am-10am	Sutton Place, Vancouver	[A81012B_VA]
Nov 20	1:30pm-3:30pm	Executive Plaza, Coquitlam	[A81012C_CO]
Feb 06	8am-10am	Sutton Place, Vancouver	[A81012D_VA]
Fee $130	PD Passport Valid	1/3 Passport Day	2 CPD Hours

TITLE STATUS
NEW

Audit Engagements – Application of the Standards Using PEG

LEVEL Intermediate

Prerequisite

Familiarity with *CPA Handbook – Assurance* and some experience performing audits.

Overview

This course provides practical guidance on how to perform effective and efficient small to medium sized audit engagements, using audit methodology contained in Volume 2 of PEG. It will address problem areas encountered in practice and often reported in the provincial practice inspection findings related to audit. This includes identifying risks, particularly at the financial statement level, developing fraud scenarios and then responding to such risks, identifying relevant internal controls and practical guidance on the extent of testing. Using real world examples and exercises, participants will unlock the full potential of PEG and its practical aids to reduce engagement time and improve results.

Who Should Attend

Practitioners and professional staff who perform audit engagements, want a refresher on how to perform an audit, or want to improve their audit efficiency and effectiveness and want to use the PEG effectively in their audit engagements.

Content

- an overview of PEG and its objectives including the PEG 12 step audit process
- risk assessment and engagement planning activities
- risk response, including developing the audit strategy and work programs, documenting the work performed, and evaluating evidence obtained
- forming an opinion and communicating results with management and those charged with governance
- keys to a successful audit

Ethics Content

This seminar contains 0.5 hours of ethics content.

Seminar Leader

Bridget Noonan, CPA, CA

Nov 26	9am-5pm	Sutton Place, Vancouver	[A83013A_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

TITLE STATUS
UPDATED

Audit Engagements – CAS 240: Risk Related to Fraud

(formerly Auditor's Responsibility Relating to Fraud)

LEVEL Introductory to Intermediate

Prerequisite

Familiarity with *CPA Handbook – Assurance*.

Overview

An auditor has responsibilities relating to fraud in the context of an audit. As fraud is intentional and involves schemes designed to hide misstatement, the risk of not detecting a material misstatement resulting from fraud is higher than the risk of not detecting one resulting from error. The requirements of the Canadian Auditing Standards (CAS) are designed to assist the auditor in identifying and assessing the risk of material misstatement due to fraud, and in designing procedures to respond to and detect such misstatements. In addition, under the new review standards, specific consideration of fraud is now required. This seminar will clarify the requirements of CAS and the auditor's responsibility relating to fraud, and assist the practitioner in meeting these responsibilities.

Who Should Attend

Practitioners who want to improve their ability to identify and assess the risk of fraud, as well as strengthen the work performed and documented in the assurance files, to efficiently and effectively meet their responsibilities related to fraud.

Content

- overview of CAS 240 and its related requirements
- review of key characteristics of fraud
- performing risk assessment procedures
- through discussion and examples, design audit procedures to address the risk of fraud including reviewing of journal entry testing requirements and building unpredictability into audit procedures
- evaluate audit evidence obtained and assess impact on planned audit procedures and the audit report
- overview of documentation and communication requirements, including responding appropriately to fraud or suspected fraud identified during the audit

Ethics Content

This seminar contains 0.5 hours of ethics content.

Seminar Leader

Terry Gunderson, CPA, CA

Nov 22	9am-12:30pm	Van Conv Ctr West, Vancouver	[A82015A_VA]
Fee $225	PD Passport Valid	1/2 Passport Day	3.5 CPD Hours

TITLE STATUS
UPDATED

Audit Engagements – Review of the Standards

(formerly Audit: A Survey of Standards with Practical Application)

LEVEL Introductory to Intermediate

Prerequisite
Familiarity with *CPA Handbook – Assurance*.

Overview
This seminar provides a solid foundation in the practical application of the Canadian Auditing Standards (CAS) to audit engagements. Participants will build on their understanding of the standards, with an emphasis on areas identified as common pitfalls in national practice inspection findings. Using a case study approach, participants will apply the standards to a set of client-specific facts. Participants will also explore the key elements of documenting an engagement working paper file including, planning, engagement execution, and reporting.

Who Should Attend
Audit practitioners at all levels of experience, who want to refresh their understanding of the CAS and explore applying the standards in a more effective and efficient manner.

Content
- audit quality
- communication with others
- audit documentation
- acceptance and overall audit strategy
- internal control
- risk assessment
- audit procedures
- conclusion and reporting

Ethics Content
This seminar contains 0.75 hours of ethics content.

Seminar Leader
Robin Diehl, CPA, CA

Nov 29-30	9am-5pm	Sutton Place, Vancouver	[A84020B_VA]
Fee $785	PD Passport Valid	2 Passport Days	14 CPD Hours

TITLE STATUS
UPDATED

Compilation Engagements – Introduction to Section 9200

(formerly Compilation Engagements: New Practitioners)

LEVEL Introductory

Prerequisite
Review *CPA Handbook* sections 9200 and AuG-5.

Overview
The objective of this seminar is to provide an introduction to compilation engagements and to public practice in general. Examples on different approaches to completing and documenting compilation engagements will be discussed. The material covers the current standards for compilation engagements and explores some best practice approaches that are being applied by practitioners.

Who Should Attend
Members seeking an introduction to compilation engagements and to public practice in general.

Content
- standards set out in *CPA Handbook* as well as upcoming standards
- miscellaneous topics relating specifically to compilation engagements
- what communication issues are relevant
- how does lack of independence impact these engagements
- how does the *CPABC Code of Professional Conduct* impact these engagements
- how do the standards impact bookkeeping practices
- how do the standards impact tax compliance work performed
- discussion of what should be included in the working paper file
- how much work is too little, or too much, to have in our files
- the use of an index, engagement letters, compilation and independence checklists, and file review procedures
- sample compilation file to provide practical examples
- appendix - compilation and independence checklists; and other relevant materials of interest to practitioners

Seminar Leader
Grant Smith, CPA, CA

Nov 01	9am-12:30pm	Sutton Place, Vancouver	[A82008A_VA]
Feb 08	9am-12:30pm	Sutton Place, Vancouver	[A82008B_VA]
Fee $225	PD Passport Valid	1/2 Passport Day	3.5 CPD Hours

TITLE STATUS
UPDATED

Compilation Engagements - Review of Section 9200

(formerly Compilation Engagements: Experienced Practitioners)

LEVEL Intermediate

Prerequisite

Familiarity with *CPA Handbook – Assurance* sections 9200 and AuG-5, and with preparing compilation engagements.

Overview

This seminar provides an overview of the *CPA Handbook – Assurance* sections relevant to compilation engagements, with practical examples of different approaches to completing and documenting compilation engagements. Best practice approaches that are being applied by practitioners will be explored. Scenario based exercises will assist participants in developing their understanding of the relevant standards and common issues, including appropriate disclosures in compiled financial statements, *CPA Code of Professional Conduct* concepts such as association with false and misleading information and independence, and assessing what documentation is necessary to support a compilation engagement file. The course also provides a forum for practitioners to discuss the difficulties they have experienced and solutions that have worked for them.

Who Should Attend

Experienced practitioners, and senior professional staff responsible for reviewing compilation engagements, who would like an overview of the practical issues of completing and documenting compilation engagements.

Content

- overview of compilation engagements and standards, including:
  - Section 9200 and AuG-5
  - AASB compilation engagements project
  - engagement acceptance, independence
  - income tax return preparation
  - compilation of a financial forecast or projection
- engagement letters and other client correspondence, and the Notice to Reader report
- file documentation, tools & resources, and retention of working paper files
- sample compilation file

Ethics Content

This seminar contains 0.5 hours of ethics content.

Seminar Leader to be drawn from

Greg Buck, CPA, CA, BComm
Tom Gillespie, CPA, CA
Bridget Noonan, CPA, CA
Grant Smith, CPA, CA

Oct 18	9am-12:30pm	Sheraton Guildford, Surrey	[A82010D_SU]
Oct 19	1:30pm-5pm	Quality Bayside, Parksville	[A82010E_PA]
Oct 24	9am-12:30pm	Quality Hotel, Abbotsford	[A82010F_AB]
Oct 25	9am-12:30pm	UBC Robson, Vancouver	[A82010G_VA]
Nov 02	1:30pm-5pm	Wingate, Kamloops	[A82010H_KA]
Nov 23	9am-12:30pm	Coast Capri, Kelowna	[A82010I_KE]
Feb 07	9am-12:30pm	Sutton Place, Vancouver	[A82010J_VA]
Fee $225	PD Passport Valid	1/2 Passport Day	3.5 CPD Hours

TITLE STATUS
UPDATED

Fraud Happens – What to do When You Suspect Fraud

LEVEL Intermediate

Prerequisite

None.

Special Note

There is some limited overlap between this seminar and Fraud Risk Management Principles & Practices (see page 50) which describes the five major principles of fraud risk management as organized by COSO. This seminar goes into much more detail about relevant investigative and legal tools and techniques for performing financial investigations

Overview

Companies must respond in an appropriate way to concerns about fraud and related inappropriate conduct. A "knee-jerk" reaction can lead to many negative consequences. A rational reaction plan is critical. This seminar will provide best practices for conducting an organized financial investigation. It will assist participants through the many challenges that companies face in such matters, and will provide "real life" examples of fraud, integrating a complex financial investigation case while examining the potential phases of such an investigation.

Who Should Attend

Members in industry who require knowledge of the complexities involved with planning and conducting a financial investigation. Members in public practice will also benefit as participants will understand the importance of complying with the CPA Canada Standard Practices for Investigative and Forensic Accounting Engagements.

Content

- introduction to fraud/fraud indicators
- planning an investigation
- interviewing basics
- investigative research
- digital forensics
- legal tools and remedies
- landmark fraud cases

Seminar Leader

Rosanne Walters, CPA, CA, CBV, CFE, CFF

Nov 09	9am-5pm	Civic Hotel, Surrey	[A83280A_SU]
Nov 28	9am-5pm	Victoria Conf Ctr, Victoria	[A83280B_VI]
Dec 14	9am-5pm	Van Conv Ctr West, Vancouver	[A83280C_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

TITLE STATUS

UPDATED

Quality Control – Review of CSQC1

(formerly Quality Control Manual for Public Practitioners – Canadian Standards of Quality Control CSQC1)

LEVEL Intermediate

Prerequisite
Familiarity with CSQC1.

Special Note
In order to apply the ideas and concepts discussed during the session, practitioners should bring a copy of the firm's quality control manual to the session.

Overview
Every public practice firm providing assurance engagements is required to comply with the quality control standards as set out in Canadian Standards for Quality Control ("CSQC1"). This course is designed to assist sole practitioners and small firms in understanding the requirements of the standard and how the requirements may be applied in a small firm environment. The course is structured based on the CPA Canada Quality Assurance Manual subscription, however the topics and ideas may be integrated into any customized firm template.

Note that requirements specific to firms providing services to publicly accountable entities will not be covered.

Who Should Attend
Practitioners who: are new to public practice and have not yet established the firm's quality control manual; are new to the provision of assurance services and have not yet implemented a firm quality control manual; or have not updated their firm's quality control manual for a number of years.

Content
- integration of quality control policies and procedures into firm and file documentation
- requirement for engagement quality control reviews
- ongoing (annual) monitoring: who, what, when, how and reporting
- completed file (cyclical) monitoring: who, what, when, how and reporting
- annual update of the firm's Quality Assurance Manual (QAM)
- common quality control deficiencies in small firms

Ethics Content
This seminar contains 0.5 hours of ethics content.

Seminar Leader
Bridget Noonan, CPA, CA

Oct 24	9am-12:30pm	Four Seasons, Vancouver	[A82410B_VA]
Fee $225	PD Passport Valid	1/2 Passport Day	3.5 CPD Hours

TITLE STATUS

NEW

Quality Control - Application of CSQC1

LEVEL Intermediate

Prerequisite
A good understanding of the requirements under CSQC1 or recent attendance at the seminar *Quality Control - Review of CSQC1*, (formerly *Quality Control Manual for Public Practitioners – Canadian Standards of Quality Control "CSQC1"*).

Special Note
Practitioners must have access to the following material in class, either in hardcopy or on a laptop.
- most current version of the firm's quality control manual
- annual staff sign-offs for confidentiality, independence and performance reviews
- a number of finalized assurance engagement files (recommend four per engagement partner of both reviews and/or audits)
- copy of most current practice inspection report & action plan
- copy of most current cyclical monitoring report & action plan
- summary of the firm's completed or scheduled CPD

Overview
Under the Canadian Standards for Quality Control (CSQC1), all firms who report on assurance engagements are required to complete annual monitoring. Annual monitoring, which differs for cyclical monitoring and practice inspection, can be performed in-house by a partner or a senior staff member. This workshop has been created to provide sole practitioners and small firms with the opportunity to complete annual monitoring. During the workshop, practitioners will review the firm's quality control documentation as well as completed engagement files. Attendees are required to bring the necessary material to the session (see special note above), preferably on an electronic device with full access to the required information.

Who Should Attend
Sole practitioners and partners of small firms who are responsible for the firm's quality control policies and procedures, and senior staff who assist the quality control partner in meeting the annual monitoring requirements.

Content
- identify all updates required for the firm's quality control manual
- identify, at a high level, all upcoming changes in assurance that relate to quality control
- create an annual CPD work plan for all partners and staff
- review a sample of the firm's completed assurance engagements
- document the firm's annual monitoring results
- create an action plan based on annual monitoring findings

Seminar Leader
Bridget Noonan, CPA, CA

Oct 30	1:30pm-5pm	Van Island Conf Ctr, Nanaimo	[A82005A_NA]
Dec 06	9am-12:30pm	Sutton Place, Vancouver	[A82005B_VA]
Feb 13	1:30pm-5pm	Marriott Inner Harbour, Victoria	[A82005C_VI]
Fee $225	PD Passport Valid	1/2 Passport Day	3.5 CPD Hours

TITLE STATUS
UPDATED

Review Engagements – Application of the New Standards

(formerly Review Engagements: Practical Application of CSRE 2400)

LEVEL Intermediate

Prerequisite

Review Engagements: Introduction to the New Standard or equivalent knowledge of the standards. Note that an AudioWeb version of the *Introduction* course is also available (see page 152).

Overview

A new standard on review engagements came into effect for reviews of financial statements and financial information for periods ending on or after December 14, 2017. This professional development seminar is essential to experienced practitioners who are already aware of the requirements of the new standard CSRE 2400 and the differences from the requirements of the current standard.

Using extracts of a review engagement file of a fictitious entity, the seminar will enable participants to

- apply practical advice to optimize the planning of the review engagement
- identify areas in the financial statements where material misstatements are likely to arise
- develop strategies for identifying milestones in the review engagement and for completing specific sections
- identify specific issues related to the implementation of the new requirements

Who Should Attend

Experienced practitioners who want to deepen their knowledge of the new requirements, and benefit from practical advice, in order to properly apply the new standard.

Content

- preliminary considerations
- identifying areas in the financial statements where material misstatements are likely to arise
- planning
  - understanding the entity and its environment
  - materiality
  - analytical procedures
- implementation and conclusion of the review engagements under CSRE 2400
  - work required (responsibilities)
  - specific issues

Seminar Leader to be drawn from

Tom Gillespie, CPA, CA
Diane McDonald, CPA, CA
Bridget Noonan, CPA, CA

Nov 26	9am-5pm	Sutton Place, Vancouver	[A83222F_VA]
Dec 07	9am-5pm	Sheraton Guildford, Surrey	[A83222G_SU]
Feb 04	9am-5pm	Sutton Place, Vancouver	[A83222H_VA]
Feb 12	9am-5pm	Marriott Inner Harbour, Victoria	[A83222I_VI]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

TITLE STATUS
UPDATED

Review Engagements – File Review

LEVEL Intermediate

Prerequisite

Familiarity with the CSRE 2400 and CSQC1.

Overview

This course focuses on techniques to effectively and efficiently review engagement files prepared under CSRE 2400. Using practical cases, participants will develop skills to ensure that the file and financial statements are in accordance with standards in CSRE 2400 and ASPE.

Participants will gain an understanding of the relationship between the review process and the requirements for engagement file reviews under CSRE 2400, including specific new requirements of CSRE 2400 that should be considered. All file review roles discussed in CSQC #1 will be covered. Exercises that address common problems that reviewers may encounter will be included.

Who Should Attend

Experienced assurance practitioners interested in improving their file review skills.

Content

- why we review working paper files
- outline of file review requirements under the CSQC #1
- how to ensure the file is prepared under the requirements of CSRE 2400
- optimal schedule for working paper review
- useful techniques to use when reviewing working papers
- discussion of review problems encountered in practice
- file review notes – how to prepare and present them to file preparers
- strategies to incorporate file efficiencies identified during the review process in future files
- exercises to help identify what is missing and documentation deficiencies

Seminar Leader

Terry Gunderson, CPA, CA

Dec 06	1:30pm-5pm	Sutton Place, Vancouver	[A82019B_VA]
Fee $225	PD Passport Valid	1/2 Passport Day	3.5 CPD Hours

TITLE STATUS

NEW

Review Engagements – Specific Topics

LEVEL Intermediate

Prerequisite

Review Engagements: Introduction to the New Standard or *Review Engagements: Application of the New Standards*, or equivalent knowledge. Note that a PD AudioWeb version of the *Introduction* course is available (see page 152).

Overview

This course will identify and discuss in detail the common application issues for review engagements under the new CSRE 2400 standard. It is not intended to be a comprehensive overview of CSRE 2400, but will build upon content from previous courses on CSRE 2400 by addressing the common documentation issues. Participants will learn how to quickly identify incomplete review engagement documentation, and understand what needs to be done and documented to resolve outstanding issues. The material includes various exercises and examples of review engagement documentation.

Who Should Attend

Practitioners and engagement staff who are conducting review engagements under CSRE 2400.

Content

- overview of the documentation requirements, and how to strike the right balance to meet the documentation standards
- common CSRE 2400 application and documentation deficiencies noted by provincial CPA practice inspection programs
- tips for addressing common deficiencies such as documenting client/engagement acceptance/continuance, assessment of independence, assessment of whether an EQCR is required, using the correct review engagement report, and dating the report
- improving documentation of the understanding the entity and its environment using alternative approaches to documenting the client's accounting systems
- documenting the identification of areas in the financial statements where material misstatements are likely to arise, and linking them to the planned review procedures
- designing and documenting appropriate analytical procedures for revenue, inventory, cost of sales, and payroll.
- performing of additional procedures, such as cut-off procedures, confirmations, and substantive test of details

Seminar Leader to be drawn from

Greg Buck, CPA, CA, BComm
Terry Gunderson, CPA, CA
Bridget Noonan, CPA, CA
Tom Gillespie, CPA, CA
Diane McDonald, CPA, CA

Oct 22	9am-12:30pm	Sheraton Guildford, Surrey	[A82004A_SU]
Oct 23	9am-12:30pm	Ramada Hotel, Prince George	[A82004B_PG]
Oct 30	9am-12:30pm	Van Island Conf Ctr, Nanaimo	[A82004C_NA]
Oct 31	9am-12:30pm	Quality Bayside, Parksville	[A82004D_PA]
Nov 02	9am-12:30pm	Wingate, Kamloops	[A82004E_KA]
Nov 08	9am-12:30pm	Quality Hotel, Abbotsford	[A82004F_AB]
Nov 09	9am-12:30pm	Sutton Place, Vancouver	[A82004G_VA]
Nov 16	9am-12:30pm	Marriott Inner Harbour, Victoria	[A82004H_VI]
Nov 23	1:30pm-5pm	Coast Capri, Kelowna	[A82004I_KE]
Dec 03	9am-12:30pm	Sutton Place, Vancouver	[A82004J_VA]
Dec 10	9am-12:30pm	Executive Plaza, Coquitlam	[A82004K_CO]
Jan 29	9am-12:30pm	Sutton Place, Vancouver	[A82004L_VA]
Fee $225	PD Passport Valid	1/2 Passport Day	3.5 CPD Hours

TITLE STATUS

UPDATED

ASPE – Comparison to IFRS

LEVEL Introductory

Prerequisite

None.

Overview

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 and how these differences impact financial statements. Participants will learn about current developments and changes to standards in IFRS and how they will impact ASPE, as well as the one-time considerations on transitioning between the two sets of standards.

Who Should Attend

CPAs who want to understand the key differences between IFRS and ASPE to determine which set of standards would be most appropriate for an entity, and be able to explain the impact of the differences on the entity's financial statements and the implications of using IFRS compared to ASPE.

Content

- conceptual framework, fair value measurement
- standards related to financial statement presentation, including non-current, non-financial assets, property, plant and equipment, investment property, agriculture, intangible assets and impairment
- borrowing costs, assets held for sale, financial instruments, joint arrangements and investment
- other liabilities, including asset retirement obligations, provisions, contingencies, employee benefits and income taxes
- leases (including new standard) and revenue recognition
- other standards, including inventories, subsequent events, government grants, foreign currency, consolidated financial statements, non-controlling interests, investments, related party transactions and stock based compensation
- first-time adoption

Seminar Leader

Diane McDonald, CPA, CA

Nov 26	9am-5pm	Hyatt Regency, Vancouver	[A83020B_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

TITLE STATUS
UPDATED

ASPE – Disclosure and Presentation

LEVEL Intermediate

Prerequisite

Familiarity with the *CPA Handbook – Accounting Part II*. The material does not address recognition and measurement; therefor, a good working knowledge of the recognition and measurement standards is expected.

Overview

This seminar reviews the reality and best practices for disclosure and presentation requirements of Part II – Accounting Standards for Private Enterprises (ASPE), from cash to cash flow; from financial instruments to equity instruments; and from the known to the contingent. The seminar will start with a basic private enterprise financial statement, showing the common presentation and disclosure requirements and will then build on those statements with additional disclosure and presentation matters. Each disclosure and presentation requirement of ASPE will be reviewed and examples will be provided (sample financial statements are developed during the seminar).

Who Should Attend

Practitioners who serve private enterprises and those who prepare financial statements for private enterprises.

Content

- general financial statement framework, including the distinction between disclosure and presentation requirements within ASPE
- presentation and classification requirements for the balance sheet, income statement, statement of changes in equity and statement of cash flows
- preparing basic and more complex note disclosures in accordance with Sections 1000 through Section 3870 and related Guidelines in ASPE
- determining what significant accounting policies require disclosure within the financial statements control and influence, including disclosure requirements for consolidated financial statements
- the economy and related disclosures

Seminar Leader to be drawn from

Tom Gillespie, CPA, CA
Diane McDonald, CPA, CA

Nov 23	9am-5pm	Sheraton Guildford, Surrey	[A83050B_SU]
Dec 05	9am-5pm	Sutton Place, Vancouver	[A83050C_VA]
Feb 04	9am-5pm	Sutton Place, Vancouver	[A83050D_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

TITLE STATUS
UPDATED

ASPE – Real Estate Industry

LEVEL Intermediate

Prerequisite

Familiarity with the *CPA Handbook – Accounting Part II*.

Overview

This seminar explores the Part II - Accounting Standards for Private Enterprise (ASPE) that are applicable to the real estate industry while making links to REALpac in a practical manner. For the purposes of this seminar, the real estate industry includes real estate development and rental properties. Participants will discuss accounting issues encountered by builders, developers and landlords that have direct or indirect ownership of the real estate. You will also learn about the measurement and disclosure requirements of ASPE specific to the real estate industry.

Who Should Attend

Professionals who work in, or are interested in financial reporting and related areas of accounting in the real estate industry.

Content

- accounting for real estate development costs
- accounting for construction of rental properties
- interest capitalization and accounting for transaction and financing fees
- vendor take back mortgage/loan and calculating the discount rate
- revenue recognition
- impairment of assets, asset retirement obligations
- accounting for joint arrangements
- resources available for real estate accounting

Seminar Leader

Diane McDonald, CPA, CA

Nov 21	9am-5pm	Van Conv Ctr West, Vancouver	[A83040B_VA]
Dec 05	9am-5pm	Ramada Hotel, Kelowna	[A83040C_KE]
Feb 08	9am-5pm	Sutton Place, Vancouver	[A83040D_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

TITLE STATUS
UPDATED

ASPE – Related Party Transactions

LEVEL Intermediate

Prerequisite

Familiarity with the *CPA Handbook – Accounting Part II.*

Overview

Deficiencies in the accounting for and disclosure of related party transactions have regularly been reported by practice review. This one-day course is designed to address the challenges private enterprise accountants and service providers encounter with respect to the measurement and disclosure of related party transactions and balances under Part II – Accounting Standards for Private Enterprises (ASPE).

Who Should Attend

Professionals involved in the preparation of private enterprise financial statements, and practitioners who serve private clients with related party transactions.

Content

- identifying a related party
- when a related party is deemed not to be a related party
- appropriate measurement basis for related party transactions
- when does Section 3856, Financial Instruments apply to related party transactions
- when should exchange value be used in place of carrying value
- presentation of amount due to and from related parties
- disclosure requirements under Section 3840 including the terminology dos and don'ts
- accounting for business combinations among related parties
- accounting for amalgamations, wind-ups and other combinations involving related parties

Comments from Past Attendees

"Many good examples in course material." "Overall the seminar is informative." "Will recommend to others."

Seminar Leader

Diane McDonald, CPA, CA

Nov 30	9am-5pm	Hyatt Regency, Vancouver	[A83111A_VA]
Feb 13	9am-5pm	Four Seasons, Vancouver	[A83111B_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

TITLE STATUS
UPDATED

ASPE – Review of the Standards

(formerly ASPE - A Survey of the Standards)

LEVEL Introductory

Prerequisite

Familiarity with *CPA Handbook – Accounting Part II.*

Overview

This two-day seminar is designed to review Part II – Accounting Standards for Private Enterprises (ASPE) from cover to cover, encompassing all sections and guidelines. In addition, the seminar will identify and outline the accounting policy choices available to management in applying ASPE. Examples and exercises will cover some of the newer or more common concepts of accounting used by private enterprises or areas where practice review has identified struggles or challenges. Some supplemental information to address ASPE application for not-for-profit organizations will be included at a high level.

Who Should Attend

Those seeking a robust and complete review of ASPE. Individuals involved in the not-for-profit sector may also find this seminar useful because of the ASPE measurement, recognition, presentation and disclosure requirements applicable to not-for-profit accounting and reporting.

Content

- accounting standards framework and general standards
- financial instruments
- tangible assets
- long-term assets
- non-financial liabilities
- shareholder equity
- revenue and other expenses
- other disclosures and other matters
- sample financial statements
- numerous note examples
- transition guidance (appendix)

Seminar Leader

Tom Gillespie, CPA, CA

Nov 22-23	9am-5pm	Van Conv Ctr West, Vancouver	[A84010B_VA]
Fee $785	PD Passport Valid	2 Passport Days	14 CPD Hours

TITLE STATUS

NEW

ASPE –Strategic Investments (1591, 3051, and 3856)

LEVEL Introductory

Prerequisite

None.

Overview

Do you or your clients have subsidiaries, significantly influenced investees or investments in joint arrangements? These types of investments are considered strategic and ASPE allows for choices in their accounting. This course examines the choices to be made and the impact on recognition, measurement, presentation and disclosure. In addition the course explores the changes to ASPE effective for fiscal years beginning January 1, 2018 when you choose to account for controlled subsidiaries or significantly influenced investees at cost.

Who Should Attend

Professionals involved in the preparation of private enterprise financial statements and practitioners who serve private clients with investments in subsidiaries, significantly influenced investees and joint arrangements.

Content

- the nature of strategic investments (i.e. control, significant influence, or joint control) and the accounting policy choices
- the differences in accounting when acquiring subsidiaries depending on whether subsidiaries are accounted for at cost, on an equity basis or consolidated
- the fundamental principles of equity accounting
- the changes in accounting for significantly influenced investees on a cost basis
- applying the principles of accounting for joint arrangements

Seminar Leader

Diane McDonald, CPA, CA

Nov 28	9am-5pm	Sutton Place, Vancouver	[A83011A_VA]
Jan 25	9am-5pm	Sutton Place, Vancouver	[A83011B_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

TITLE STATUS

UPDATED

ASPE & NFPO – Update 2018

(formerly Accounting Update for Private Enterprises and NPOs)

LEVEL Intermediate

Prerequisite

Familiarity with *CPA Handbook – Accounting Part II* and *CPA Handbook – Accounting Part III*.

Overview

This seminar will review recent revisions to Part II -Accounting Standards for Private Enterprises (ASPE) and Part III - Accounting Standards for Not-for-Profit Organizations (ASNFPO). Participants will first be provided with an overview of changes to ASPE and ASNFPO, followed by specific examples of the implementation of new and revised recommendations. In addition, practical guidance will be provided on selected accounting matters identified by practice advisory and/or practice inspection.

Who Should Attend

Professionals who are involved in the preparation and analysis of financial statements for small and medium-sized entities, and practitioners who provide assurance on these financial statements.

Content

ASPE

- exposure drafts
- retractable or mandatorily redeemable shares issued in a tax planning arrangement
- accounting for related party financial instruments and significant risk disclosures
- agriculture project
- consultation on priorities for ASPE
- narrow scope amendment financial instruments
- matters discussed by the Private Enterprise Advisory Committee
- practice inspection topics and other “hot topics”

NFPO

- accounting standard improvements to NFPO’s and how to apply them
- projects
- contributions revenue recognition
- reporting controlled and related entities
- matters discussed by the NFPO Advisory Committee

Seminar Leader to be drawn from

Tom Gillespie, CPA, CA — Terry Gunderson, CPA, CA
Diane McDonald, CPA, CA — Bridget Noonan, CPA, CA

Oct 19	9am-12:30pm	Quality Bayside, Parksville	[A82051A_PA]
Oct 22	9am-12:30pm	Ramada Hotel, Prince George	[A82051B_PG]
Oct 26	9am-12:30pm	Ramada Hotel, Kelowna	[A82051C_KE]
Oct 29	9am-12:30pm	Van Island Conf Ctr, Nanaimo	[A82051D_NA]
Oct 30	9am-12:30pm	Sutton Place, Vancouver	[A82051E_VA]
Nov 01	9am-12:30pm	Wingate, Kamloops	[A82051F_KA]
Nov 02	9am-12:30pm	Delta Ocean Pointe, Victoria	[A82051G_VI]
Nov 05	9am-12:30pm	Executive Airport, Richmond	[A82051H_RI]
Nov 07	9am-12:30pm	Quality Hotel, Abbotsford	[A82051I_AB]
Nov 07	9am-12:30pm	Comfort Inn, Surrey	[A82051J_SU]
Nov 20	9am-12:30pm	Executive Plaza, Coquitlam	[A82051K_CO]
Dec 14	9am-12:30pm	Van Conv Ctr West, Vancouver	[A82051L_VA]
Feb 05	9am-12:30pm	Sutton Place, Vancouver	[A82051M_VA]
Feb 13	9am-12:30pm	Marriott Inner Harbour, Victoria	[A82051N_VI]
Fee $225	PD Passport Valid	1/2 Passport Day	3.5 CPD Hours

TITLE STATUS

UPDATED

IFRS – Disclosure and Presentation

LEVEL Intermediate

Prerequisite

Familiarity asdfwith *CPA Handbook – Accounting Part I.*

Overview

This seminar will provide participants with an overview of Part I – International Financial Reporting Standards (IFRS) related to the presentation of all the statements and related note disclosure for all areas, with an emphasis on quality presentation and disclosure. Participants will be updated on the work of standards setters to streamline presentation and disclosure. The use of non-GAAP disclosures will also be explained. The seminar will also provide insights into areas of disclosure that security commissions have found deficient. Sample notes and statements will be reviewed to provide participants with a variety of disclosure examples.

Who Should Attend

Those who are involved in the preparation of financial statements for publicly accountable enterprises or entities that have chosen to adopt IFRS; and CFOs, VP Finance, directors and senior managers, controllers and other financial reporting staff, board members and other persons who want to be updated on technical and practical knowledge of financial statement preparation and the disclosure requirements for financial statements under IFRS.

Content

- introduction and overview of IFRS note disclosure issues
- statement of financial position and general disclosure
- general presentation
- asset disclosure
- liabilities and equity
- statements
- revenue and expenses
- special topics

Note that specific presentation and disclosure requirements for rate regulated entities is not covered in the course.

Seminar Leader

Erin Rao, CPA, CA

Nov 20-21	9am-5pm	Van Conv Ctr West, Vancouver	[A84050B_VA]
Fee $785	PD Passport Valid	2 Passport Days	14 CPD Hours

TITLE STATUS

UPDATED

IFRS – Mining Industry

(formerly IFRS – Mineral Resource Exploration & Mining Industry Basics)

LEVEL Introductory to Intermediate

Prerequisite

Basic understanding of *CPA Handbook – Accounting Part I.*

Overview

This seminar will provide participants with a good understanding of Part I – International Financial Reporting Standards (IFRS) relevant to the mining industry, and their specific application to industry issues.

Who Should Attend

Professional accountants who work in, or are interested in, the mining sectors and related area of publicly accountable enterprises, and audit committee members of these enterprises.

Content

- exploration for an evaluation of mineral resources
  - recognition and measurement
  - impairment
  - functional currency
- development stage companies
  - cost capitalization
  - borrowing cost
  - property options/earn-ins
- production stage companies
  - property, plant and equipment
  - commencement of production
  - componentization, depreciation and amortization
  - impairment of assets
  - deferred stripping
  - inventory
  - revenue
  - functional currency
- closure
  - accounting for decommissioning and environmental liabilities
- financing activities
  - share-based payments
  - flow-through shares
  - unit offerings
  - share issuance costs
  - royalties
  - convertible debt
- financial statement presentation, reporting and disclosure; general presentation standards
- IFRS disclosures

Seminar Leaders

Mark Patterson, CPA, CA
Mike Saevitzon, CPA, CA

Oct 26	9am-5pm	Four Seasons, Vancouver	[A83140B_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

TITLE STATUS
UPDATED

IFRS – Review of the Standards

(formerly IFRS – A Survey of the Standards)

LEVEL Introductory

Prerequisite

Familiarity with *CPA Handbook – Accounting Part I.*

Overview

The objective of this seminar is to provide participants with a solid introduction to Part I - International Financial Reporting Standards (IFRS). The seminar will also cover IFRS standards currently under development at the International Accounting Standards Board (IASB) that are expected to be introduced during the next year. The focus is on the IFRS standards that apply to most profit-oriented entities. At the end of this two-day seminar you will be aware of the foundation of IFRS, and be able to explain the IFRS standards that apply to most profit-oriented entities; identify changes to IFRS and the impact on financial statements; summarize current developments in IFRS; and list relevant resources.

Who Should Attend

Professionals who work in financial reporting and related areas of publicly accountable enterprises or other enterprises applying IFRS, who are reading financial statements of publicly accountable enterprises, or who wish to be able to explain IFRS standards. Audit committee members who would like to gain an understanding of IFRS may also find this to be a useful seminar.

Content

- overview of IFRS
- financial statement presentation and accounting policies
- property plant and equipment
- investment property
- intangible assets and fair value measurement
- impairment of assets
- revenue, financial instruments, income taxes, liabilities
- strategic investments, separate financial statements
- other IFRS standards
- examples and exercises to illustrate application issues
- optional content: first-time adoption considerations

Seminar Leader

Erin Rao, CPA, CA

Dec 12-13	9am-5pm	Van Conv Ctr West, Vancouver	[A84030B_VA]
Fee $785	PD Passport Valid	2 Passport Days	14 CPD Hours

TITLE STATUS
UPDATED

IFRS – Update 2018

LEVEL Intermediate

Prerequisite

An understanding of the current standards in the *CPA Handbook – Accounting Part I.*

Overview

This seminar provides participants with a review of new and revised IFRS and an up-to-date snapshot of other projects being considered by IFRS standard setters. The content covers new and revised standards approved from July 2017 to June 2018 and includes identification of the changes and inclusion of examples for some of the revisions.

The topics addressed by the IFRS Discussion Group during the year will be identified with more in-depth coverage of specific items. Revisions to the standards as a result of guidance issued by the IFRS Interpretations Committee during the year will be covered as part of the changes. A review of the areas where the IFRS Interpretations Committee determined improvements or clarifications were not considered necessary will also be undertaken so that participants can obtain a better understanding of the standards, and the impact of this information on judgments being made. Recent publications by the regulators are also referenced so that participants are aware of and consider the implications of regulator communications.

Who Should Attend

All professionals who want to be informed of the recent developments in IFRS standards, including: practitioners, preparers and readers of financial statements using IFRS. Including CFOs and VPs, directors, senior managers, controllers and other financial reporting staff, auditors, and audit committee members.

Content

- new and revised standards issued during the year
  - conceptual framework
- maintenance projects including annual improvements 2015-2017; classification of liabilities; definition of a business
- commentary on standards
  - IFRS Interpretations Committee discussions
  - IFRS Discussion Group notes
  - recent publications
  - regulator communications
- projects in process

Seminar Leader to be drawn from

Diane McDonald, CPA, CA
Erin Rao, CPA, CA

Nov 08	9am-12:30pm	Executive Plaza, Coquitlam	[A82150A_CO]
Nov 09	9am-12:30pm	Sutton Place, Vancouver	[A82150B_VA]
Nov 16	1:30pm-5pm	Marriott Inner Harbour, Victoria	[A82150C_VI]
Dec 06	9am-12:30pm	Ramada Hotel, Kelowna	[A82150D_KE]
Feb 20	9am-12:30pm	Sutton Place, Vancouver	[A82150E_VA]
Fee $225	PD Passport Valid	1/2 Passport Day	3.5 CPD Hours

TITLE STATUS
UPDATED

IFRS 9 – Financial Instruments

LEVEL Intermediate

Prerequisite

Although not mandatory, participants would benefit from pre-reading the most recent edition of IFRS 9 contained in the *CPA Handbook – Accounting Part I.*

Overview

This course is designed to teach participants the main provisions of the new Part I - International Financial Reporting Standards (IFRS) 9, Financial Instruments, which will replace most guidance that currently exists in IAS 39 when adopted. What is changed from and also what is consistent with IAS 39 will be discussed.

This new standard applies to all companies and may require planning, system and process changes to implement and may significantly change financial instrument classification, measurement and impairment amounts and their timing of recognition. The standard is generally applied retrospectively with the exception of the hedge accounting requirements which are generally applied prospectively. The standard is effective for fiscal years starting after January 1, 2018. The standard has been released in phases, and if entities adopted a prior version of IFRS 9, they will apply that version until they adopt the final standard.

This course will provide participants with the necessary knowledge of the standard to apply it to their own financial instrument fact situation.

Who Should Attend

Professionals responsible for the accounting, presentation and disclosure of financial instruments.

Content

- overview and scope
- classification, reclassification and presentation
- initial recognition, subsequent measurement and de-recognition
- impairment
- disclosures
- effective date and transitional requirements
- derivatives and embedded derivatives
- hedging
- future developments

Seminar Leader

Peter Jackson, CPA, CA

Dec 14	9am-5pm	Van Conv Ctr West, Vancouver	[A83012B_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

TITLE STATUS
UPDATED

IFRS 15 – Revenue Recognition

LEVEL Intermediate

Prerequisite

Participants should pre-read IFRS 15, Revenue from Contracts with Customers contained in the *CPA Handbook – Accounting Part I.*

Overview

The objective of this seminar is to provide participants with an understanding of the new five-step revenue recognition framework under Part I – International Financial Reporting Standards (IFRS) 15 and how to apply it. The course will address disclosure requirements, transitional requirements, and key judgments in applying the standard.

Who Should Attend

Professionals who are responsible for revenue recognition and the accounting thereof.

Content

- overview and scope, including transitional requirements
- the 5-step model framework, including how to apply it
  - step 1: identify the contract with the customer
  - step 2: identify the performance obligations
  - step 3: determine the transaction price
  - step 4: allocate the transaction price
  - step 5: recognize revenue, including how and when
- disclosure and presentation requirements
- other application guidance on various topics such as warranties, licences, capitalization of costs of obtaining and fulfilling a contract, contract modifications etc.
- conversion considerations, industries significantly impacted and current developments

Seminar Leaders

Alex Farrell, CPA, CA
Peter Jackson, CPA, CA

Dec 11	9am-5pm	Van Conv Ctr West, Vancouver	[A83331B_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

TITLE STATUS
UPDATED

IFRS 16 – Leases

LEVEL Intermediate

Prerequisite

Participants would benefit from pre-reading the most recent edition of IFRS 16 contained in the *CPA Handbook – Accounting Part I*.

Overview

The new lease standard under Part I – International Financial Reporting Standards (IFRS) 16 will be effective for annual fiscal periods beginning on or after January 1, 2019. The impact will be significant for all companies that currently have operating leases. This seminar provides an in-depth review of the new standard, including the objective and scope of the standard, defined terms, exemptions, its effective date and transitional requirements. The starting point will be identifying a lease and separating components of a contract between the lessee and lessor. The lessee coverage will include the principles of recognition, measurement, presentation and disclosure. The likely costs and benefits of the new standard on the lessee will be discussed, as well as the impact on a company's financial statements and ratios. The lessor coverage will include the classification of leases as finance or operating and disclosure and subleases. In addition, the topic of sale and leaseback transactions will be reviewed. Participants will have the opportunity to review a number of illustrative examples.

Who Should Attend

Practitioners, financial analysts, and controllers responsible for lease accounting; CPAs interested in understanding the implications of the new lease standard; and Audit committee members.

Content

- overview of reasons for the change, and what will change
- introduction to IFRS 16 - objective and scope, defined terms, exemptions, and effective date
- identifying a lease
  - separate components of a contract lessee and lessor
- lessee
  - recognition
  - measurement – initial and subsequent
  - presentation
  - disclosure
- lessor
  - classification of leases
  - finance leases
  - operating leases
  - subleases
  - disclosure
- sale and leaseback transactions
- transitional requirements
- impact of IFRS 16 on financial statements and ratios

Seminar Leader to be drawn from

Diane McDonald, CPA, CA
Erin Rao, CPA, CA

Oct 17	9am-5pm	Sutton Place, Vancouver	[A83300C_VA]
Nov 05	9am-5pm	Sutton Place, Vancouver	[A83300D_VA]
Feb 22	9am-5pm	Sutton Place, Vancouver	[A83300E_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

TITLE STATUS
NEW

Introduction to Financial Reporting Concepts

LEVEL Introductory

Prerequisite

None.

Overview

This course serves as an introduction to the financial reporting concepts included in the *CPA Handbook – Accounting*. The course content includes a discussion of general requirements to prepare financial statements that would be suitable for use in preparing a corporate tax return.

By the end of this course, participants will be able to
- differentiate between compiled financial statements and financial statement frameworks
- prepare a basic set of financial statements
- determine what measurement issues will impact the preparation of a corporate tax return

Who Should Attend

Individuals who are compiling financial statements, or those who are looking to develop or refresh their knowledge of financial reporting concepts and would benefit from a prerequisite course prior to attending other professional development courses on specific financial reporting frameworks such as ASPE, ASNPO or IFRS.

Content

- compiled financial statements
- financial statement frameworks
  - ASPE
  - ASNPO
  - IFRS
- overview of financial statements and financial reporting concepts
  - balance sheet, income statement, statement of changes in equity and statement of cash flow
  - recognition, measurement, presentation and disclosure
- corporate taxation issues to address when preparing financial statements
- key measurement issues to consider when preparing to convert compiled financial statements to ASPE/ASNPO/IFRS
- related bookkeeping considerations

Seminar Leader

Grant Smith, CPA, CA

Dec 03	1:30pm-5pm	Sutton Place, Vancouver	[A82006A_VA]
Feb 07	1:30pm-5pm	Sutton Place, Vancouver	[A82006B_VA]
Fee $225	PD Passport Valid	1/2 Passport Day	3.5 CPD Hours

TITLE STATUS

UPDATED

NFPO — Disclosure and Presentation

LEVEL Intermediate

Prerequisite

Understanding of the *CPA Handbook – Accounting Part III*, with respect to measurement issues, or completion of the seminar NFPO – Review of the Standards.

Overview

Not-for-Profit organizations are becoming more complex as they try new ideas, offer new services and grow in a competitive environment. With this added complexity comes the need to increase and expand financial statement disclosures to ensure the users of the financial statements obtain relevant and valuable information.

This course will provide a broad review of financial statement presentation and note disclosure requirements under Part III- Accounting Standards for Not-for-Profit Organizations (ASNFPO) and relevant disclosures from Part II - Accounting Standards for Private Enterprises (ASPE). Participants will review a number of examples of disclosures and engage in activities to identify issues and improve disclosures. Different presentation methods (restricted fund vs. deferral method) and the impact on presentation will be discussed.

Who Should Attend

Professionals at all levels involved in the preparation and review of NFPO financial statements. Those involved in larger NFPOs may prefer to attend the seminar *NFPO & Registered Charities – Accounting & Taxation*. Government-controlled NFPOs must follow the *Public Sector Accounting Handbook*, which will not be addressed in this seminar.

Content

- concepts that drive the presentation and disclosure requirements
- statement of operations presentation and related disclosures
- statement of financial position presentation and related disclosures, e.g. financial instruments
- statement of changes in net assets
- statement of cash flow presentation and related disclosures
- choosing a presentation methodology and understanding the different methods for accounting for contributions
- review of sample financial statements using real world examples
- disclosure of significant accounting policies
- financial instruments
- inventories
- controlled and related entities
- long lived assets
- employee future benefits
- other revenues and contributions
- allocated expenses and interfund transfers
- related party transactions
- ongoing projects and potential impact of changes

Seminar Leader

Robin Diehl, CPA, CA, CBV

Nov 27	9am-5pm	Sutton Place, Vancouver	[A83310B_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

TITLE STATUS

UPDATED

NFPO – Review of the Standards

(formerly NFPOs: A Survey of the Standards - Private Sector)

LEVEL Intermediate

Prerequisite

Familiarity with *CPA Handbook – Accounting Part III.*

Overview

Organizations that operate in the not-for-profit sector are developing new operational models, increasing in complexity and are seeing an increasing need by financial statement users for transparency and comprehensive information. This course will discuss the application of accounting standards, with an emphasis on areas where choice exists, that are found 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 setting policies and their impacts on disclosure, and how to determine the appropriate accounting treatment for an organization given different facts and scenarios.

Who Should Attend

Professionals at all levels involved in the preparation and review of NFPO financial statements. Those involved in larger NFPOs may prefer to attend the seminar *NFPO & Registered Charities – Accounting & Taxation*. Government-controlled NFPOs must follow the *Public Sector Accounting Handbook*, which will not be addressed in this seminar.

Content

- determination of an appropriate accounting framework for an entity
- financial statement concepts
- contributions – revenue recognition
- contributions receivable
- inventories
- employee future benefits
- financial instruments
- long lived assets
- reporting controlled and related entities
- allocated expenses
- ongoing projects and potential impact of changes

Seminar Leader

Robin Diehl, CPA, CA, CBV

Dec 04	9am-5pm	Sutton Place, Vancouver	[A83190B_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

TITLE STATUS
UPDATED

NFPO & Registered Charities – Accounting & Taxation

LEVEL Introductory to Intermediate

Prerequisite

Familiarity with *CPA Handbook – Accounting Part III*.

Overview

This seminar will address accounting and income tax issues specific to organizations carried on for not-for-profit or charitable purposes. Not-for-profit accounting, tax and reporting rules are substantially different from those applicable to private sector organizations. Without a solid understanding of these rules, individuals in financial reporting positions with these organizations may encounter difficulties meeting their reporting requirements.

Who Should Attend

Members in the NFPO and/or charities sectors, practitioners who audit or provide advice to registered charities or NFPO entities, and practitioners or board members who are new to NFPO/charities, or who require a refresher.

Those who are responsible for preparing, analyzing, or auditing financial statements from smaller NFPOs, and/or those interested in a review of current standards may prefer to attend NFPO - Review of the Standards.

Content

- overview of Part III – Accounting Standards for Not-for-Profit Organizations (ASNFPO);
- tax compliance requirements for charities and not-for-profits;
- Canadian tax rules with respect to loss of tax exempt status and planning techniques to minimize this risk; and
- the latest proposed and enacted tax legislation affecting these entities

Seminar Leaders

Liette Bates-Eamer, CPA, CA
Hayley Maschek

Nov 05	9am-5pm	Ramada Hotel, Kelowna	[A83320A_KE]
Nov 06	9am-5pm	Marriott Inner Harbour, Victoria	[A83320B_VI]
Nov 07	9am-5pm	Hyatt Regency, Vancouver	[A83320C_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

TITLE STATUS
NEW
AVAILABLE OPTION
WWW
WEB SESSION

PSAS – Introduction to Asset Retirement Obligations

LEVEL Intermediate

Prerequisite

Basic familiarity with Canadian Public Sector Accounting Standards.

Overview

The objective of this seminar is to enable participants to understand this new PSAS standard and the implications it will have for local governments, senior governments, and government organizations.

Who Should Attend

Treasurers, CFOs, and Finance Directors from local government, crown corporation and agencies with significant capital assets; or other government organizations with a significant investment in tangible capital assets. Government auditors will also benefit from attending this seminar.

Content

- a general overview of the new standard
- discussion of how it will interact with existing liabilities standards
- ideas for activities that should be undertaken during the implementation period to be ready for the effective date
- case study with numerical examples

Seminar Leader

Bill Cox, FCPA, FCA

Nov 16	8am-10am	Sutton Place, Vancouver	[A81002A_VA]
Fee $130	PD Passport Valid	1/3 Passport Day	2 CPD Hours

TITLE STATUS: NEW | AVAILABLE OPTION: WEB SESSION

PSAS – Introduction to Public Private Partnerships

LEVEL Intermediate

Prerequisite

Basic familiarity with Canadian Public Sector Accounting Standards.

Overview

The objective of this seminar is to enable participants to understand this new PSAS standard and the implications it will have for local governments, senior governments, and government organizations.

Who Should Attend

Treasurers, CFOs, and Finance Directors from local government, crown corporations and agencies that may now, or in the future, be contemplating alternative financing arrangements for provision of infrastructure. Government auditors will also benefit from attending this seminar.

Content

- a general overview of the new exposure draft
- discussion of the impact of discount rates and different options for guidance
- case study with numerical examples

Seminar Leader

Bill Cox, FCPA, FCA

Dec 04	8am-10am	Sutton Place, Vancouver	[A81003A_VA]
Fee $130	PD Passport Valid	1/3 Passport Day	2 CPD Hours

TITLE STATUS: UPDATED

PSAS – Review of the Standards

(formerly PSAB: The Basics)

LEVEL Introductory

Prerequisite

Familiarity with the *CPA Handbook – Public Sector Accounting*.

Overview

This seminar provides an overview of Canadian Public Sector Accounting Standards (PSAS) applicable to entities in the government sector. Key recommendations of PSAS will be reviewed, and a variety of examples will be used to demonstrate the application of the recommendations. Key concepts in PSAS will be compared against their IFRS and ASPE counterparts.

Who Should Attend

Professional accountants who prepare, audit, use or provide advice on public sector financial reports and would like to develop a stronger understanding of the *PSAB Handbook*.

Content

- financial statement concepts, objectives and reporting model
- government transfers, restricted assets and revenue, and revenue recognition concepts
- defining the government reporting entity and reporting of controlled entities including government partnerships, investments in government business enterprises
- tangible capital assets (infrastructure), intangibles and impairment of assets
- Financial instruments and foreign exchange
- pensions and employee future benefits
- contaminated sites, landfill obligations and asset retirement obligations
- related party transactions and inter-entity transactions
- loans receivable and loan guarantees
- changes in PSAB – exposure drafts, discussion papers, transitional provisions

Seminar Leader to be drawn from

Bill Cox, FCPA, FCA
Brian Szabo, CPA, CA

Oct 19	9am-5pm	Coast Capri, Kelowna	[A83330A_KE]
Nov 07	9am-5pm	Marriott Inner Harbour, Victoria	[A83330B_VI]
Nov 09	9am-5pm	Hyatt Regency, Vancouver	[A83330C_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

TITLE STATUS
UPDATED

PSAS – Specific Topics

(formerly PSAB: Beyond the Basics)

LEVEL Advanced

Prerequisite

Experience working with PSAS and/or completion the seminar *PSAS –Review of the Standards* (formerly known as *PSAB: The Basics* and *PSAB 101*).

Overview

This seminar provides an overview of the more complex areas of Canadian Public sector Accounting Standards (PSAS) applicable to entities in the government sector. Common topics that raise discussions between finance professionals and auditors will be explored in detail and demonstrated in case studies.

Who Should Attend

Professional accountants who prepare, audit, use or provide advice on public sector financial reports and would like to develop a stronger understanding of PSAS as set out in the *CPA Handbook Public Sector Accounting*, specifically the topics noted below.

Content

- employee future benefits, how well existing standards may work with shared risk plans and other new concepts, PSAB's work plans in this area and future directions
- government transfers and the problems and diversity of opinion in application
- public/private partnerships and status of standards in the area
- financial instruments and hedging
- The government reporting entity, controlled entities and the concept of control in PSAS
- common issues facing local government, government organizations and senior governments
- international public sector accounting standards board, GAAP hierarchy and PSAB's international strategy

Seminar Leader to be drawn from

Bill Cox, FCPA, FCA
Brian Szabo, CPA, CA

Nov 22	9am-5pm	Van Conv Ctr West, Vancouver	[A83332A_VA]
Nov 30	9am-5pm	Victoria Conf Ctr, Victoria	[A83332B_VI]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

TITLE STATUS
UPDATED

Public Company Reporting – Annual Update

LEVEL Intermediate

Prerequisite

None.

Overview

Change is constant in the public company reporting environment. You need to know about these changes so you can do your job properly, whether you are in public practice or in industry. A panel of experts in the field will discuss recent accounting, auditing, and regulatory developments affecting public companies and current "hot topics".

Who Should Attend

Professionals involved in public company reporting, whether as an auditor in public practice, or a preparer in industry.

Content

Presenters include auditors of public companies, and the primary accounting or policy contacts from the BC Securities Commission and the TSX Venture Exchange. If you do any work with public companies, you don't want to miss this session!

Comments from Past Attendees

"Good balance on breadth vs. detail. Good variety of presentation methods." "Good selection of presentation from numerous organizations involved with public companies. Good update on existing and upcoming issues."

Seminar Leader

Panel TBA

Nov 27	9am-12:30pm	Four Seasons, Vancouver	[A82000A_VA]
Fee $225	PD Passport Valid	1/2 Passport Day	3.5 CPD Hours

Accelerate and Optimize Financial Close and Spreadsheet Controls

LEVEL Intermediate

Prerequisite

A good understanding of financial close processes and use of spreadsheets.

Overview

A common challenge in business is the perception that the financial close process is lengthy, inefficient and cumbersome. Finding additional time saving at month-, quarter- and year-end is critical during these challenging times of increasing complexity in financial reporting, and accelerated reporting and regulatory obligations.

Participants in this seminar will 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.

Who Should Attend

CFOs, controllers and accounting managers who wish to strike the right balance between speed and accuracy for the financial close process, without compromising the internal control environment, and improve controls over the use of financial spreadsheets.

Content

- how to accelerate the close process and allow more time for management review and analysis
- how to strike a right balance between speed and accuracy without compromising controls
- financial close best practices and robust controls
- how to create a roadmap to accelerate the close process and enhance related controls
- spreadsheet risks and controls
- spreadsheet control policy
- how to redesign spreadsheets to reduce likelihood of error and facilitate the use of spreadsheets as powerful analytical tool

Seminar Leader

Massood Oroomchi

Nov 22	9am-5pm	Van Conv Ctr West, Vancouver	[A83550A_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

REQUIRED
CALCULATOR

Advanced Financial Statement Analysis

LEVEL Intermediate

Prerequisite

It will be helpful but not mandatory to have an understanding of financial ratio analysis prior to attending this seminar.

Special Note

This seminar will be very interactive and hands-on. Participants will analyze real company financial statements and should bring a calculator with them.

Overview

Analyzing financial statements is no easy task. In a world where companies report results using different accounting frameworks, this task is becoming more and more challenging. This seminar will focus on how to analyze financial statements, in particular the lesser known techniques which are becoming more and more important when comparing IFRS and ASPE reporting. It will review the right situations in which to use straightforward financial ratio analysis and will also address adjustments which must be made to statements prior to the use of ratios so that the financial analysis techniques are applied effectively. Finally, it will highlight other measures which must be taken into account to arrive at a detailed assessment of a company's financial health.

Who Should Attend

Financial professionals who would like to enhance their abilities to read and evaluate the health of financial statements. It will also be of interest to users of financial statements, such as bankers, nonfinancial managers seeking financing, or equity analysts.

Content

- identify challenges involved in comparing companies
- apply common techniques to predict the likelihood of bankruptcy
- describe common adjustments required to financial statements prior to commencing analysis
- identify areas of subjectivity in financial statements and make a critical assessment of the subjectivity
- understand the differences in earnings quality across companies
- understand what makes a strong balance sheet
- improve confidence and competency in analyzing financial statements

Comments from Past Attendees

"Great course and excellent presentation!" "Presenter was amazing. The materials in the course was interesting." "Good amount of hands-on work vs. lecture. Enjoyed it!"

Seminar Leader

Karine Benzacar, MBA, FCPA, FCMA, CFA

Oct 25	9am-5pm	Four Seasons, Vancouver	[A83600B_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

Building Enterprise Performance Dashboards

LEVEL Intermediate

Prerequisite

None.

Overview

Changes in the competitive landscape have resulted in increased focus on enterprise performance by senior management and stakeholders. The need for better and relevant information for managing the business has also led many organizations to look beyond traditional "accounting" based (and often historically based) performance measures. This multi-dimensional view of the enterprise with both leading and lagging Key Performance Indices (KPIs) has led many leading organizations to design holistic performance measurement and management frameworks to run their business. These frameworks are often referred to as "Balanced Scorecards".

By participating in this seminar, you will gain insights into the usefulness of well-designed scorecards for corporations as well as for business units. Through real examples, cases and hands-on work, you will get an increased appreciation of the importance of these scorecards in improving performance and to help your company exceed expectations through successful implementation of the balanced scorecard.

Who Should Attend

Senior and mid-level professional accountants in industry involved in measuring and improving the performance of their organization.

Content

- the performance challenge of the Enterprise
- designing a performance measurement system
- defining stakeholders and stakeholder value paradigm
- role of financial and non-financial metrics – beyond the obvious
- BSC and logic models
- cultural implications of a PM environment
- designing a PM system – hands-on case
- real life examples of PM systems in action – strengths and weaknesses
- an implementation checklist and best practices

Comments from Past Attendees

"Vijay is a great presenter and knowledgeable on the subject." "Dr. Jog is a very good teacher – he has extremely broad experience and insights in general."

Seminar Leader

Dr. Vijay Jog

Mar 07	9am-5pm	Sutton Place, Vancouver	[A83630A_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

TITLE STATUS
UPDATED

Controllership – Operational Management

(formerly part of Controllership – A 'Partner' for Business)

LEVEL Intermediate

Prerequisite

None.

Overview

Today's Controller must fulfill four distinct roles to effectively add value to their organizations - steward, operator, catalyst, and strategist roles. This course focuses on the first two of these roles in which controllers find themselves operating on a daily basis, and provides an overall understanding of the skills and tools necessary to effectively fulfill the Controller's responsibilities as an operational manager. Participants will reflect on which role or roles they currently find themselves in and identify which role(s) they need to develop most. The operator role is explored by examining essential controller skills and the controller's role in human resource management. The steward role is then examined by looking at financial, performance, and relationship management including many practical tips in each area. Finally, risk management is considered as an important part of the overall steward role.

Participants will gain insights and new skills to improve the overall value they add to their organizations and will come away with a much broader view of the Controller's overall role in their organization.

Who Should Attend

Finance professionals working towards a Controller position, who are new to the position of Controller, or long-time Controllers looking for new tools/ideas or a refresher on operational management areas of the role.

Content

- today's Controller – roles and responsibilities
- Controller essentials
- Controller as HR manager
- Controller as financial / information manager
- Controller as risk manager

Seminar Leader to be drawn from

Rieghardt Van Enter, CPA, CMA
Barbara VanDerLinden, FCPA, FCMA

Nov 19	9am-5pm	Van Conv Ctr West, Vancouver	[A83601A_VA]
Nov 22	9am-5pm	Marriott Inner Harbour, Victoria	[A83601B_VI]
Mar 14	9am-5pm	Four Seasons, Vancouver	[A83601C_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

TITLE STATUS
UPDATED

Controllership – Strategic Leadership

(formerly part of Controllership – A 'Partner' for Business)

LEVEL Intermediate

Prerequisite

None.

Overview

Today's Controller must fulfill four distinct roles to effectively add value to their organizations - steward, operator, catalyst, and strategist roles. This course focuses on the last two of these roles for which many controllers may not feel adequately prepared. Too often controllers are caught up in the urgent need of the day without adequate time to focus on their influence as catalysts and strategists within their organizations. This course provides the opportunity to view the controllership role as a leader and a key strategic partner within the organization.

Controllers occupy a unique place within the organization working on a daily basis with both operations and executive management. This position affords them the chance to influence all aspects of the organization. In this course, the topic of leadership is first explored along with its various perspectives/theories. Participants will reflect on their own leadership style and how that works within their organization. To be an effective leader, controllers must have emotional intelligence and be able to interact with people across the various generations. This course will provide insight and tips for working with people of all ages. Controllers also should be adding significant value as strategic leaders. Strategic planning frameworks and basic strategy development techniques will be reviewed with a particular eye to how the controller can add value to these areas. Finally, the controller's role as a change/conflict/crisis manager will be considered as this is an area of increasing importance within our changing economic environment.

Who Should Attend

Finance professionals working towards a Controller position, who are new to the position of Controller, or long-time Controllers looking for new tools/ideas or a refresher on strategic leadership areas of the role.

Content

- Controller as a leader
- Controller as a strategic manager
- Controller as a change, conflict and crisis manager

Seminar Leader to be drawn from

Rieghardt Van Enter, CPA, CMA
Barbara VanDerLinden, FCPA, FCMA

Nov 02	9am-5pm	Ramada Hotel, Kelowna	[A83602A_KE]
Nov 15	9am-5pm	Ramada Hotel, Prince George	[A83602B_PG]
Nov 20	9am-5pm	Van Conv Ctr West, Vancouver	[A83602C_VA]
Nov 23	9am-5pm	Marriott Inner Harbour, Victoria	[A83602D_VI]
Nov 26	9am-5pm	Sheraton Guildford, Surrey	[A83602E_SU]
Mar 15	9am-5pm	Four Seasons, Vancouver	[A83602F_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

TITLE STATUS
UPDATED

COSO Undone – How to Comply with the 2013 COSO and Optimize your Internal Control Program

LEVEL Intermediate

Prerequisite

General understanding of internal control frameworks.

Overview

The objective of this seminar is to provide a comprehensive understanding of the requirements of the 2013 COSO and demonstrate how to map the existing internal control environment to the 2013 COSO; identify and rank the severity of deviations from the requirements of the 2013 COSO; and comply with the 2013 COSO though integrating it with daily business activities. The seminar will show how to convert the internal control concepts to business initiatives and integrate them with daily business activities as opposed to a mere compliance exercise. The seminar will also provide a concise understanding of CEO/CFO Certification requirements for publicly traded companies.

Who Should Attend

Members who directly or indirectly have or will have responsibility for internal control programs, and practitioners who provide advice on assurance services to all types of organizations.

Content

- a comprehensive review of the 2013 COSO and its publications
- overview of internal control environments and control categories including entity level controls, transactional level controls and information technology controls
- practical top-down, risk-based approach to the design and establishment of internal controls
- how to document and evaluate entity level controls
- practical solutions to design and evaluation of disclosure controls and internal controls over the financial close process, consolidation, consolidated financial statements and notes thereto, MD&A and other core documents
- practical solutions for documentation and evaluation of spreadsheet controls
- practical solutions for enhancement of contract management controls and establishment of a risk-based approach to controls over outsourced service providers
- management controls including risk management programs, human resources policies and practices and strategic planning, budgeting and forecasting cycles
- how to deploy efficient risk-based techniques in documenting and testing transactional level controls
- anti-fraud controls
- how to optimize internal control programs and achieve significant savings by focusing on real issues

Seminar Leader

Massood Oroomchi

Nov 23	9am-5pm	Van Conv Ctr West, Vancouver	[A83681A_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

Effective Financial Analysis for Business Decisions – Medium-Sized Privately Held Businesses

LEVEL Intermediate

Prerequisite

None

Overview

The effectiveness of business decisions and analysis made by owners and their advisors depends directly on their understanding of the financial impact of their decisions. Management is looking for well laid out recommendations that go beyond a summary of financial information. This seminar introduces a decision making format for the use of financial information and a road map for providing consistent, well-articulated analysis and recommendations. Insights into strategic decisions, financial planning and forecasting, implications for investment and financial decisions, firm valuations, mergers and acquisitions, and the potential impact of some key variables and events on the financial health of the company are explored. This seminar is invaluable when preparing a business case for changing current operations and undertaking future investment and financial and valuation decisions.

Who Should Attend

Professional accountants who develop or interpret financial information for analysis, and provide advisory services to owners/managers of medium-sized privately held businesses (employees more than 100 and/or sales more than $5 million). The seminar is developed for advisors and owners/managers of these businesses. Those in smaller firms should attend the Effective Financial Analysis for Business Decisions - Small Businesses seminar instead.

Content

- understanding historical and current performance
- choosing the right analysis framework for the task at hand
- linking shareholder needs for disclosure and reporting
- understanding key components of firm performance
- building a financial planning and forecasting model
- understanding effective investment decisions
- understanding firm valuation and M&A
- linking strategy to corporate and financial plans

Comments from Past Attendees

"Most relevant and best presented seminar I have attended in many years." "Good presentation – kept us interested." "Great financial models and new, up-to-date information." "Instructor was very knowledgeable and entertaining."

Seminar Leader

Dr. Vijay Jog

Mar 08	9am-5pm	Sutton Place, Vancouver	[A83666A_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

Essential Topics for Controllers

LEVEL Introductory

Prerequisite

None.

Overview

You've done that before, right? You can handle that for us, right? How many times as our career develops as a financial manager do we hear those statements? And how many times is "that" a task that you don't feel all that comfortable performing?

We are inundated in our professional training by opportunities to develop our technical, financial-based skills. However, as we move along in our career, we discover a whole other set of skills that need development. As a financial manager, those soft skills, as well as your technical abilities, will define your career and determine your advancement. This seminar will deal with seven topic areas that you will be expected to be proficient at, or at least have knowledge of, as your career progresses.

Who Should Attend

Financial professionals whose careers are developing beyond the accounting function towards supervision and management.

Content

Through practical tips and with a maximum one hour per topic, the following essential, career enhancing topics will be de-mystified

- conducting an employment interview
- strategic planning basics
- negotiating skills
- performance evaluations
- managing versus leading
- communication skills
- terminating an employee
- communication exercise

Comments from Past Attendees

"Some very interesting topics." "The topics were well covered. Just the right amount of information." "The seminar was very good. Very useful information."

Seminar Leader

Keith Martin, CPA, CA, MBA

Dec 11	9am-5pm	Van Conv Ctr West, Vancouver	[A83611B_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

Faster & Better Financial Processes

LEVEL Intermediate

PrerequiSite

None.

Overview

Financial processes affect all areas of your business, including operations, sales, marketing, purchasing, and research and development. These functions require timely, accurate information and transaction processing. This seminar will help participants learn how to implement a financial process review (FPR) to decrease cost and improve efficiency. Participants will gain skills and knowledge to understand FPR best practices and barriers for implementation, and how to troubleshoot problems when using FPR tools.

Who Should Attend

Senior financial managers who wish to understand the applicability of this tool and/or who wish to identify opportunities for improvement in their own or their client's organization.

Content

Using small discussion groups, best practice examples, case studies and a structured approach to implementing an FPR project, we will cover

- a detailed definition of FPR
- why a company should use it and who should use it.
- the work steps necessary to implement an FPR project, such as process mapping, performance measures, and designing the new world
- the potential barriers to implementation
- benchmarking and best practices
- advice on practical problems associated with these tools.

Comments from Past Attendees

"Good presenter, kept things moving. Appreciated Bruce's personal anecdotes." "Great energy throughout the whole day." "Exceeded expectations. Bruce is an excellent instructor, made the material very relevant and that really added value."

Seminar Leader

Bruce Acton, FCMC, MBA

Nov 06	9am-5pm	Ramada Hotel, Kelowna	[A83570B_KE]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

Financial Management in the Construction Industry

LEVEL Intermediate

Prerequisite

None.

Overview

Construction is Canada's largest single industrial activity in terms of both value and employment. It is an industry where large projects are predominantly controlled by large, national organizations but where the majority of the work is done by small, often family-run contractors. Most industry experts acknowledge the increasing importance of business systems and financial awareness to the success of the construction entity.

As an industry specialization, construction provides a great deal of variety and challenge for the financial professional. From the necessary complexity of the project accounting system to the broad and integrated spectrum of stakeholders, the finance professional should be prepared to confidently address a wide range of topics in order to provide value to their organization.

Who Should Attend

Financial professionals within the construction industry who may be either new to their position or involved with a growing enterprise, practitioners who wish to attain greater knowledge of the industry in order to better serve their construction clients, and experienced construction financial managers looking for a refresh.

Content

- managing contracts, including interpreting key contractual terms
- developing a better decision-based information system
- job costing
- revenue recognition
- project controls
- change order management
- dealing within the customer's system
- collections
- project review

Seminar Leader

Keith Martin, CPA, CA, MBA

Dec 12	9am-5pm	Van Conv Ctr West, Vancouver	[A83613B_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

TITLE STATUS
UPDATED

Fraud Risk Management Principles & Practices – An Integrated Approach

LEVEL Introductory

Prerequisite

None.

Special Note

There is some overlap between this seminar and *Fraud Happens – What to Do When you Suspect Fraud* (see page 50), which focuses on COSO Principle 4, and tools and techniques to perform investigations.

Overview

Effective fraud risk management requires an integrated approach. Too often, businesses implement some helpful practices, but overlook other principles that ensure the full spectrum of their unique risks is addressed. This holistic approach brings together key principles and practices using the 2016 updated COSO fraud risk management framework. Case discussions, sample codes of conduct, fraud policies, fraud risk checklists, numerous examples and other practical materials will to help participants build a corporate culture and framework that prevents and detects fraudulent activity. This seminar provides "real life" examples of fraud and examples based on instructor and participant experiences. It explains why we need to manage fraud. It then provides an integrated approach, describing the five key COSO principles of fraud risk management outlined below.

Who Should Attend

CPAs in industry who require knowledge of potential fraud indicators in their transaction streams, and how to develop an integrated approach for effective fraud risk management, and public practitioners who want to better identify indicators of potential fraud which can assist in the conduct of an effective audit.

Content

- why we need to manage fraud risks
- COSO framework for Fraud Risk Management
- Principle 1: Governance - creating an ethical environment: discussion about codes of conduct, fraud policies, hotlines, ethics training, employee declarations, and other practices
- Principle 2: Comprehensive fraud risk assessment: fraud indicators and red flags, and a series of fraud risk assessment cases
- Principle 3: Preventive and detective fraud control activities: a high-level overview of potential controls
- Principle 4: Fraud investigation protocol: high-level overview of how to properly react to fraud, investigation considerations, taking corrective action and fidelity insurance matters
- Principle 5: Fraud risk management monitoring: ongoing evaluation and timely communication, with an introduction to data analytics

Ethics Content

This seminar contains 1 hour of ethics content.

Seminar Leader

Rosanne Walters, CPA, CA, CBV, CFE, CFF

Nov 15	9am-5pm	Coast Capri, Kelowna	[A83281B_KE]
Dec 03	9am-5pm	Sutton Place, Vancouver	[A83281C_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

Improving Financial Performance for Controllers and CFOs

LEVEL Intermediate

Prerequisite

None.

Overview

There is more and more pressure to do things better, smarter, and cheaper. This seminar will help the finance professional improve financial performance by dealing with short-term issues such as reducing expenses and increasing cash flows; changing internal procedures and process to help the business prosper; and understanding the changing business environment to be prepared for the future.

This fast-paced one-day seminar combines lectures and problem-solving workshops. You will be exposed to novel ideas, hone your analytical skills, and be able to develop practical solutions for your organization.

Who Should Attend

Financial directors, managers, controllers, CFOs and advisors who want to help their organizations and/or clients survive and prosper.

Content

- setting the stage
  - cycles and history
  - new economic order
  - financial and economic models
- profit improvement
  - cash management
  - expenses and soft costs
  - banking and bankers
  - managing receivables
  - managing payables
  - capital expenditures
- process improvement
  - finance and accounting: function and reporting
  - internal control and risk management
  - practical approach to enterprise risk management
  - management tools
  - reinvigorating the strategic process
- conclusion
  - ideas to follow up

Comments from Past Attendees

"Jeffrey was knowledgeable, entertaining and had great real-life examples." "Practical solutions and tips." "Interesting information."

Seminar Leader

Jeffrey Sherman, MBA, CIM, FCPA, FCA

Dec 13	9am-5pm	Van Conv Ctr West, Vancouver	[A83250B_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

Internal Control Refresher for Financial Managers

LEVEL Intermediate

Prerequisite

None.

Overview

When was the last time you looked at your organization's internal controls? This fast-paced seminar provides financial managers with an interesting refresher on control, through videos, case studies and discussion. Content includes what business life would be like without control, the COSO internal control framework, and case studies of controls gone wrong.

You will leave with a deeper understanding of internal control and with some new ideas on innovative approaches to internal control.

Who Should Attend

CPAs in industry, including financial managers, supervisors and controllers, who want to improve their organization's efficiency and effectiveness, and CPAs who advise clients.

Content

- COSO framework and how to apply it
- improving and implementing controls
- internal control, ISO and quality
- controlling the budget process
- spreadsheet controls
- getting buy-in across the organization

Seminar Leader

Jeffrey Sherman, MBA, CIM, FCPA, FCA

Dec 14	9am-5pm	Van Conv Ctr West, Vancouver	[A83256B_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

TITLE STATUS

UPDATED

Internal Controls – Industry Sector

LEVEL Intermediate

Prerequisite

Familiarity with the COSO framework.

Overview

This course provides an overview of the main concepts of internal control and its components, focusing on the COSO framework. The course will outline common internal control deficiencies in a small to medium sized company and look at potential solutions through examples and discussions. Participants will identify key controls to address some of the main risks, and well as the importance of addressing segregation of duties. This course will look at the effect that technology has had on internal controls in a small to medium sized companies. Finally, the course will provide an overview on how to monitor whether the internal controls in your organization are effective.

Who Should Attend

CPAs in industry with a moderate level knowledge of internal controls and the COSO framework.

Content

- internal controls importance and main risks
  - importance of internal controls
  - management's responsibility for internal controls
  - identification of main risk areas
- COSO
  - control environment
  - risk assessment
  - information systems
  - control activities
  - monitoring
- fraud
  - types of fraud
  - components of the fraud triangle
  - fraud and COSO
  - professional skepticism
- technology
  - ERP systems
  - general IT controls
  - use of service providers
  - potential problems
- documentation and monitoring
  - types of documentation
  - determination of consequences for non-compliance
  - monitoring
  - can this help documentation assist your auditor

Ethics Content

This seminar contains 0.75 hours of ethics content.

Seminar Leader

Terry Gunderson, CPA, CA

Nov 29	9am-5pm	Sutton Place, Vancouver	[A83007A_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

Interpreting Financial Statements

(formerly Financial Statement Analysis)

LEVEL Intermediate

Prerequisite

None.

Overview

Regardless of our career choice, as professional accountants we will be involved in the review and analysis of financial statements. For many, this is a skill that might deteriorate over time: seeing the same numbers month after month; being rushed to report on an annual statement. However, our ability to quickly and confidently get to what is happening through the interpretation of financial results is a critical skill that we need in our toolbox.

Who Should Attend

Members in public practice, and members in industry involved in managing reporting dashboards or reviewing financial statements.

Content

By actually reviewing financial statements throughout the day, this seminar will strengthen your financial statement analysis capabilities by

- referring briefly to accounting principles as it pertains to financial reporting
- re-familiarizing participants with key reporting issues impacting F/S interpretation
- discussing management of financial information towards desired outcomes
- discussing ratio and trend analysis and its merits/pitfalls
- discussing such concepts as 'context', 'business strategy and intent', 'quality' and other matters usually considered foreign in the preparation of accounting information

There will be hands-on review and interpretation of case studies, as well as discussions.

Seminar Leader

Keith Martin, CPA, CA, MBA

Dec 10	9am-5pm	Van Conv Ctr West, Vancouver	[A83612C_VA]
Dec 13	9am-5pm	Sheraton Guildford, Surrey	[A83612D_SU]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

TITLE STATUS UPDATED

Management Accounting – Foundations

(formerly Management Accounting Refresher)

LEVEL Introductory

Prerequisite

None.

Overview

Common associations with management accounting include cost accounting, break even analysis and variance analysis. However, management accounting concepts include much more, such as organizational behavior and employee motivation, including new research on workplace altruism. At the center of all these concepts in management accounting is their application to creative problem solving.

This course provide a refresher of key management accounting topics and terminology, and will help participants apply management accounting concepts to generate new ideas on how to solve problems such as

- how to identify and classify costs for internal decision making
- how to use cost behavior to help with budgeting and forecasting
- how to more effectively communicate with non-financial managers (such as sales, HR)
- how to create incentives to align organizational strategy and employee motivations

Participants will work through problems, case studies and collaborate with their peers to discuss how they can use management accounting information and tools to help solve challenges within their organizations.

Who Should Attend

Professional accountants who are transitioning into a managerial accounting role (or responsibilities) and require a refresher of key concepts in management accounting.

Content

- decision making and costing
- cost volume profit analysis
- relevant costing
- performance measurement and budgeting
- communicating with non-financial managers
- trends in management accounting and conclusion

Seminar Leader

Erin Rao, CPA, CA

Nov 29	9am-5pm	Sheraton Guildford, Surrey	[A83004A_SU]
Dec 04	9am-5pm	Sutton Place, Vancouver	[A83004B_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

REQUIRED
CALCULATOR

Powerful Financial Analysis

LEVEL Introductory to Intermediate

Prerequisite

None.

Special Note

This workshop is highly interactive. Participants will work on exercises in order to learn through hands-on practice. It is highly recommended that participants bring a calculator with them to obtain maximum benefit.

Overview

Does part of your role or those you supervise involve financial analysis? In today's fast-paced corporate world, financial analysis can mean many things. This seminar will cover the key facets of a financial analyst's role within an accounting department and help analysts further their career by providing meaningful information to those around them.

Who Should Attend

Financial analysts within an accounting department or a business unit and those who are responsible for reviewing cost centre reports, monthly reports, budget reports and other variance reports. It is intended for accountants working within companies rather than public practitioners.

Content

- what is financial analysis?
- role of financial analysis in the finance function
- month-end analysis
- quarter-end analysis and year-end analysis
- budget analysis
- cost analysis
- ratio analysis
- overall financial statement analysis
- Altman's Z-score

Comments from Past Attendees

"Very excellent presenter and seems to be able to keep her audience captivated." "Overall, a useful seminar and insights into new ways of thinking about FP&A." "Excellent seminar – the day was full of good information."

Seminar Leader

Karine Benzacar, MBA, FCPA, FCMA, CFA

Oct 23	9am-5pm	Victoria Conf Ctr, Victoria	[A83614B_VI]
Oct 26	9am-5pm	Sheraton Guildford, Surrey	[A83614C_SU]
Feb 19	9am-5pm	Ramada Hotel, Kelowna	[A83614D_KE]
Feb 21	9am-5pm	Hyatt Regency, Vancouver	[A83614E_VA]
Feb 22	9am-5pm	Executive Plaza, Coquitlam	[A83614F_CO]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

Practical Tips for Controllers & CFOs

LEVEL Intermediate

Prerequisite

None

Overview

This seminar provides a wide range of useful tips for use in your work – tips that are not normally found in seminars or textbooks. These are illustrated with interesting anecdotes and examples. Participants will also derive value from sharing experience and practices with each other, and benchmarking your practices with those of your peers.

Who Should Attend

Accountants in leadership positions, such as Controllers, CFOs and directors of finance, and those moving toward these roles, as well as those in public practice or consulting, who advise clients. Accountants from large companies, government and not-for-profits also find the seminar useful.

Content

- great tips on key indicator reporting
- getting the most out of your bank
- cash flow crisis – what to do when it happens
- cost-cutting tips
- M&A, the good, the bad and the ugly
- the fast close
- system conversion dos and don'ts
- more creative thinking for accountants
- auditors and lawyers – minimizing costs
- more useful financial reporting

Ethics Content

This seminar contains 0.5 hours of ethics content.

Comments from Past Attendees

"Seminar covers most of the issues faced by a Controller/CFO on a daily basis – very practical and useful." "Excellent seminar. The facilitator was interested in helping others meet their needs." "Seminar leader provided useful practical tips in an enjoyable manner." "I very much enjoyed the practical nature of this course."

Seminar Leader

Stephen Priddle, CPA, CA, CMA

Nov 05	9am-5pm	Van Island Conf Ctr, Nanaimo	[A83270A_NA]
Nov 06	9am-5pm	Marriott Harbour, Victoria	[A83270B_VI]
Nov 07	9am-5pm	Sutton Place, Vancouver	[A83270C_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

Practical Tips for Controllers and CFOs – The Case Course

LEVEL Intermediate

Prerequisite

None

Overview

This seminar will be useful for sharpening the skills of many industry members and their advisors. This realistic seminar is a companion to *Practical Tips for Controllers & CFOs*, and can be taken as either a stand-alone, or before or after that seminar.

Using group and break-out sessions, this practical seminar will involve working through a number of in-depth, realistic cases. At the end of the session, attendees will enhance their practical knowledge and gain many useful tips for their everyday responsibilities. The input of the attendees' wide range of skills and experience, applied to the case situations, provides additional depth to the seminar.

Who Should Attend

Any accountant, who faces now, or will face in the future, some of the situations covered in the content.

Content

- improving the relevancy of your financial reporting to users - this case will help you provide more useful information
- negotiating an offer to finance with a bank - practical tips on responding to a realistic bank offer, how should it be assessed? how to get the bank to revise it in your favour?
- contract review from a financial perspective - review contracts more effectively
- resolving ethical dilemmas – realistic scenarios to discuss the danger areas - are there legitimate ways around them and what do the rules say?
- practical foreign exchange risk management - from an accountant's rather than a banker's perspective
- how do you find out what you really need to know in a job interview

Comments from Past Attendees

"Good realistic cases." "Interesting examples used to get points across." "Presenter did a very good job."

Seminar Leader

Stephen Priddle, CPA, CA, CMA

Nov 08	9am-5pm	Sutton Place, Vancouver	[A83311A_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

Writing & Maintaining Task-Based Procedures

(formerly Documenting Your Organization's Financial Processes)

LEVEL Introductory to Intermediate

Prerequisite

None.

Overview

This seminar is designed to teach participants how to prepare and maintain detailed procedures covering key work tasks, such as paying invoices, running payroll, or making journal entries. A current and comprehensive set of procedures helps ensure that your organization runs smoothly, is meeting regulatory and financial control requirements, and can survive unexpected employee turnover. Learn a proven method of creating and maintaining procedures from a professional technical writer with decades of experience across most areas of business and government.

Who Should Attend

Those required to or are interested in preparing and maintaining detailed work task procedures, who want to learn best practices in these areas.

Content

- the benefits of documenting work processes, and the risks of not documenting them
- planning your project, including clearly understanding your purpose and audience, identifying the required procedures, and developing prototypes
- working with subject matter experts (usually front-line staff) to walk through and document procedures, including capturing screen shots
- editing for clarity and consistency
- organizing and formatting for ease of use
- reviewing and approving with key stakeholders
- providing access to procedures using commonly-available online tools
- updating procedures as your processes change (a major failing of many organizations)

In addition to many examples and exercises, the seminar will also provide participants with a Word template for writing procedures, and an Excel template for controlling projects.

Comments from Past Attendees

"Duncan is very knowledgeable with document preparation and was very happy to share his experiences." "Materials are easy to follow and logical in sequence – will be a useful resource." "Excellent course."

Seminar Leader

Duncan Kent, BA, MA

Nov 16	9am-5pm	Hyatt Regency, Vancouver	[A83680B_VA]
Feb 20	9am-5pm	Sutton Place, Vancouver	[A83680C_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

Finance

TITLE STATUS

UPDATED

Budgeting & Financial Management: Understanding Budgeting Variance Analysis & Forecasting

LEVEL Introductory

Prerequisite

None

Overview

This interactive full-day seminar enables participants to understand and use financial information, adopt a disciplined approach to managing budgets, and communicate with financial specialists. Participants will learn the principles of financial management and how to apply them when making decisions that may affect financial performance. Participants will also be able to understand the context within which a budget must be managed in order to meet corporate reporting requirements, and to understand the responsibilities in managing a budget.

Who Should Attend

Those who are responsible for financial management, budgeting, and forecasting in their firms or organizations, seeking an introduction to budgeting and financial management.

Content

- introduction and seminar overview
- delivering business and financial performance – framework for evaluating your organization and its operating units; your organization's performance measures; recognizing the links between performance measures; monitoring performance
- analyzing costs - interpreting financial reports; fixed and variable costs; contribution analysis
- developing budgets - the importance of budgets; key value propositions; building budget expectations with PEST analysis; how budgets are used; common pitfalls; case study
- analyzing and interpreting variances - calculating variances; interpreting the results; how variances are used to monitor and control the business
- forecasting the budget - forecasting revenues and expenditures; controllable and uncontrollable costs; identifying ways to minimize/eliminate variances

Comments from Past Attendees

"This is one of the best seminars I have taken." "Very good. I would recommend this to my colleagues."

Seminar Leader to be drawn from

Antoine Bishara, CPA, CA, CFA
Scott Powell, CPA, CA

Oct 24	9am-5pm	Van Island Conf Ctr, Nanaimo	[A83030E_NA]
Nov 06	9am-5pm	Executive Plaza, Coquitlam	[A83030F_CO]
Nov 15	9am-5pm	Wingate, Kamloops	[A83030G_KA]
Nov 23	9am-5pm	Van Conv Ctr West, Vancouver	[A83030H_VA]
Nov 28	9am-5pm	Ramada Hotel, Kelowna	[A83030I_KE]
Dec 11	9am-5pm	Sheraton Guildford, Surrey	[A83030J_SU]
Dec 12	9am-5pm	Van Conv Ctr West, Vancouver	[A83030K_VA]
Feb 12	9am-5pm	Sutton Place, Vancouver	[A83030L_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

TITLE STATUS UPDATED

REQUIRED CALCULATOR

Business Valuations – Foundations

(formerly Business Valuations: The Basics)

LEVEL Introductory

Prerequisite

None.

Special Note

Please bring a calculator as it may be used during class.

Overview

This full day seminar provides participants a practical insight into business valuation. Participants will learn about and apply valuations tools such as the capitalized cash flow (CCF) approach and the discounted cash flow (DCF) approach to business case studies. The seminar also focuses on business valuation interpretation and the mechanics of the valuation process.

Who Should Attend

Professionals with limited to no valuation experience who are seeking a better understanding of business valuation principles and practices.

Content

- overview of valuation methodologies, including income approaches, market approaches, and asset approaches, and how to apply them to a real business
- CCF and DCF valuation techniques and application
- calculating maintainable earnings
- determining capitalization and discount rates
- enterprise value versus equity value
- market valuation approaches using equity value and enterprise value multiples

Seminar Leader to be drawn from

Brad Hall, CPA, CA, CBV
Fred Tang, CPA, CA, CBV
Lucas Terpkosh, CPA, CA, CBV, CFF
Ian Wanke, CPA, CA, CFA, CBV

Oct 22	9am-5pm	Sutton Place, Vancouver	[A83290A_VA]
Oct 23	9am-5pm	Executive Plaza, Coquitlam	[A83290B_CO]
Oct 29	9am-5pm	Ramada Hotel, Prince George	[A83290C_PG]
Oct 30	9am-5pm	Quality Bayside, Parksville	[A83290D_PA]
Nov 06	9am-5pm	Best Western, Terrace	[A83290E_TE]
Nov 09	9am-5pm	Van Island Conf Ctr, Nanaimo	[A83290F_NA]
Nov 16	9am-5pm	Quality Hotel, Abbotsford	[A83290G_AB]
Nov 27	9am-5pm	Victoria Conf Ctr, Victoria	[A83290H_VI]
Feb 22	9am-5pm	Hyatt Regency, Vancouver	[A83290I_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

TITLE STATUS UPDATED

REQUIRED CALCULATOR

Business Valuations – Advanced

(formerly Business Valuations: Beyond the Basics)

LEVEL Advanced

Prerequisite

Business Valuations – Foundations (formerly known as *Business Valuations: The Basics*).

Special Note

Please bring a calculator as it may be used during class.

Overview

Building on the concepts of *Business Valuations - Foundations*, this seminar gives participants a more detailed insight into some of the more complex issues associated with business valuations. Participants will be introduced to topics such as cost of capital, terminal value quantification, synergy calculations, valuation discounts, and valuing securities other than common shares.

Who Should Attend

Professionals who are seeking a deeper understanding of the more complex issues surrounding business valuation.

Content

- complexities associated with DCF valuation methods, including how to calculate cost of capital (equity and debt), cash flow, and residual value assumptions
- valuing a business using multiples
- valuation and buyer intent - strategic buyers versus financial buyers
- identifying and valuing synergies
- applying valuation discounts, including minority interest, marketability, and key person discounts
- an introduction to valuation issues specific to other securities such as preferred shares and convertible debentures
- a review of different valuation reports in Canada

Seminar Leader to be drawn from

Fred Tang, CPA, CA, CBV
Ian Wanke, CPA, CA, CFA, CBV

Nov 28	9am-5pm	Victoria Conf Ctr, Victoria	[A83010B_VI]
Dec 12	9am-5pm	Van Conv Ctr West, Vancouver	[A83010C_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

TITLE STATUS

NEW

Business Valuations – Purchase Price Allocations

LEVEL Advanced

Prerequisite

Experience in a role where purchase price allocation is necessary, or previous attendance at *Business Valuations – Foundations* (formerly *Business Valuations – The Basics*) or *Business Valuations – Advanced* (previously *Business Valuations: Beyond The Basics*.)

Overview

This seminar will teach the participant the approaches to purchase price allocation and the main methods of assessment of intangible assets arising from a transaction used in practice. The seminar will cover the basic steps of the process for allocation of the purchase price in recording a transaction, as well as the key elements and sources of information needed for the assessment.

Who Should Attend

CPAs in public practice providing purchase price allocation support work and/or controllers and CFOs involved in the financial reporting element of business acquisitions.

Content

- overview of standards and definitions
- types of intangible assets
- analysis of the reasonableness of the transaction
- common methods of assessment of intangible assets
- trade-marks
- technology and trade secrets
- non-competition agreement
- work force
- customer relations and order book
- the equation of the transaction reconciliation
- other considerations
- documentation and information sources

Seminar Leader

Fred Tang, CPA, CA, CBV

Nov 26	9am-5pm	Hyatt Regency, Vancouver	[A83009A_VA]
Jan 25	9am-5pm	Marriott Inner Harbour, Victoria	[A83009B_VI]
Feb 19	9am-5pm	Sutton Place, Vancouver	[A83009C_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

Corporate Finance

LEVEL Introductory to Intermediate

Prerequisite

None.

Overview

This workshop will focus on providing participants with a working knowledge of the various ways business activity, and mergers and acquisitions (M&A) in particular, can be assessed and financed through the capital markets. Participants will learn what form of funding a company will typically seek at each stage of its business life-cycle and understand the relative benefits of debt funding over equity funding, including and the role of equity capital markets (ECM) and debt capital markets (DCM) in delivering financing solutions. The key issues that a company faces at each stage of an M&A process will also be discussed.

Who Should Attend

Members in industry and practitioners who need a working knowledge of corporate finance or who need to update their corporate finance knowledge.

Content

- corporate finance jargon (e.g. sell side versus buy side; primary versus secondary capital markets, etc.)
- corporate finance valuation
- best practice M&A analysis
- acquisition finance alternatives
- senior and subordinated debt funding sources
- equity funding sources

This hands-on workshop is built around a series of applied case studies.

Comments from Past Attendees

"Excellent course with interesting delivery of content." "Very informative." "Practical examples and real cases." "I thought the presenter was very knowledgeable and I liked how he encouraged participants to give real life examples."

Seminar Leader

Antoine Bishara, CPA, CA, CFA

Nov 02	9am-5pm	Sutton Place, Vancouver	[A83240B_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

TITLE STATUS
UPDATED

Corporate Treasury Management

LEVEL Intermediate

Prerequisite

Basic knowledge of Corporate Finance concepts.

Overview

Treasury is a key finance function that is vital to the financial health and success of every business, large or small. The treasury function has evolved from traditional cash and liquidity management to a more strategic function encompassing broader working capital, corporate finance and risk management activities. Treasury involves the management of money and financial risks in a business. Its priority is to ensure the business has the money it needs to manage its day-to-day business obligations, while also helping develop its long term financial strategy and policies.

This course will provide treasury professionals and financial managers with an understanding of the treasury function, and how to apply the fundamental principles of the treasury function within the finance department of their organizations. Participants will work through detailed calculations (e.g. components of WACC, foreign exchange contracts, financial modeling), case studies, and examples.

Who Should Attend

Treasury professionals, controllers, and senior financial managers that are looking for an introduction to the treasury function up to an intermediate level.

Content

- the corporate treasury function
- financial planning and analysis
- working capital management
- cash flow management and Capital markets
- financial modeling
- treasury operation and control

Seminar Leader

Joe Marchello, CPA, CA, CFP

Nov 15	9am-5pm	Four Seasons, Vancouver	[A83080A_VA]
Nov 16	9am-5pm	Marriott Inner Harbour, Victoria	[A83080B_VI]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

Due Diligence for Acquisitions

LEVEL Intermediate

Prerequisite

Basic understanding of, or experience in, mergers and acquisitions.

Overview

This seminar focuses on the core part of a mergers and acquisitions (M&A) project: how to plan, evaluate, analyze and then synthesize the information accumulated. 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 be able to deepen their understanding of M&A transactions, understand strategic objectives of a due diligence review, plan an acquisition, develop valuation and pricing recommendations, understand critical issues in confidentiality agreements and identify key issues in a prospective acquisition.

Who Should Attend

Professionals who have experience in M&A and would like fresh perspectives, those undertaking due diligence for the first time, and those on the receiving end of a due diligence review.

Content

- overview of the due diligence process
- planning the acquisition
- information and confidentiality
- planning the due diligence review
- financial, human resources, legal and operational reviews
- purchase price, and valuation
- reporting
- tips and traps

Seminar Leaders

Aleem Jinnah, CPA, CA, CBV
Sandra Suh, CPA, CA, CBV

Nov 23	9am-5pm	Van Conv Ctr West, Vancouver	[A83090B_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

TITLE STATUS
UPDATED

Financing Strategies

LEVEL Intermediate

Prerequisite

Basic understanding or, or experience in, financing transactions.

Overview

This seminar will provide an in-depth review of the various forms of financing to fund capital projects, acquisitions or to restructure an existing capital structure. The seminar will dive into the practical details of what capital providers are seeking, issues that arise, and how companies should prepare themselves to execute a financing transaction. Through real-life examples, identifying common pitfalls, highlighting key elements and case studies, the seminar will put financial executives in a better position to seek financing and negotiate with capital providers.

Who Should Attend

Controllers, chief financial officers, chief executive officers and other financial executives who provide input into, or take the lead, in undertaking a financing transaction within their own enterprises.

Content

- overview of financing strategy and capital markets
- current state of the capital markets, including benchmarks and rules of thumb regarding realistic financing parameters
- basic capital structure elements
- discussion of various forms of financing, including
  - government financing
  - operating lines and term debt
  - mezzanine and subordinated debt
  - real estate financing
  - private equity
  - venture capital
  - public equity and convertible debentures
- understanding cost of capital
- cost of capital and investment decisions
- financing process and negotiating strategies

Seminar Leaders

Adrian Leech, CFA, CBV
Ian Wanke, CPA, CA, CFA, CBV

Nov 05	9am-5pm	Ramada Hotel, Kelowna	[A83130B_KE]
Nov 09	9am-5pm	Four Seasons, Vancouver	[A83130C_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

TITLE STATUS
NEW
NEW

REQUIRED
CALCULATOR

Treasury & Finance for Accountants

LEVEL Introductory

Prerequisite

None.

Special Note

This workshop is a highly interactive session. Participants will perform calculations individually while working through concrete exercises and examples, and therefore should bring a calculator, preferably one with time value of money functions.

Overview

Although accountants are not specifically trained in the inner workings of hedging and financial instruments, they are often called upon for advice in these areas, particularly to hedge various risks. Alternatively, accountants may be uninvolved in the business decisions related to hedging but perform the accounting related to such tasks. However, performing the accounting requires a basic understanding of the business transactions behind financial instruments.

This course reviews the business side of finance, hedging, and treasury transactions and provides accountants with a solid understanding of some of the key financial principles to obtain a better understanding of the business aspects.

Who Should Attend

Accountants who would like to broaden their knowledge in the area of finance and understand the business aspects of financial instruments.

Content

- financial instruments - the business aspect
- hedging - key principles
- over-the-counter (OTC) vs exchanges
- financial instruments - inner working and details
- futures, forwards, swaps, and options
- alternative strategies
- protective puts
- covered calls
- collars
- money spreads
- swap options
- foreign exchange

This course does not discuss the accounting for financial instruments.

Seminar Leader

Karine Benzacar, MBA, FCPA, FCMA, CFA

Oct 22	9am-5pm	Victoria Conf Ctr, Victoria	[A83133A_VI]
Oct 24	9am-5pm	Four Seasons, Vancouver	[A83133B_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

Information & Business Technology

SPECIAL FEATURE: PAPERLESS
OPTIONAL: LAPTOP

Advanced Data Magic with Excel

LEVEL Advanced

Prerequisite

Intermediate knowledge of Excel.

Special Note

This is NOT a hands-on seminar. The course will be taught in Excel 2016 with reference to the differences to Excel 2013 and 2010. The seminar focuses on Excel for Windows and we encourage you to bring your windows laptop equipped with Excel 2010 or newer to follow along with the instructor. This is a paperless seminar – see page 78 for details.

Overview

Ready to take your Excel skills to the next level? This seminar starts by clarifying some key Excel misunderstandings that affect typical Excel workbooks and shows you how advanced Excel functions will improve your calculating skills. Need to bring in data into Excel from an outside source? The seminar will cover this in depth. You will learn how to use Excel's data analysis tools, including advanced lookups. Then the course dives into array formulas, a powerful tool that very few Excel users understand. Finally, you will be exposed to PowerPivot, a tool first introduced in Excel 2010 that enables you to work with large amounts of data from multiple data sources.

Who Should Attend

Business professionals who work with Excel 2010 or newer and want to extend their knowledge with advanced features and functions. The focus of this session is on Excel for Windows; however, many of the Excel features discussed are also available in Excel for Mac.

Content

- how Excel calculates; creating custom formats; date arithmetic
- Excel functions such as AND, OR; CHOOSE, INDEX, MATCH and INDIRECT
- access external data such as importing from ACCESS, importing from other file types, using Microsoft Query
- data analysis tools such as Goal Seek, Data Tables, Scenario Manager and Solver
- the power of lookups, VLOOKUPS with IFERROR, VLOOKUPS with wild cards, combining VLOOKUPS and doing a VLOOKUP across multiple sheets
- using array formulas to simplify complex calculations, including single, multi-cell, comparative arrays, conditional formatting
- discover the power of Excel PowerPivot, Power View, Data Models, DAX calculations and Power Map that is available in Excel 2013 Pro Plus and 2016 Pro Plus

Seminar Leader

Marion Williams

Nov 21	9am-5pm	Ramada Hotel, Prince George	[C83380D_PG]
Mar 15	9am-5pm	Sutton Place, Vancouver	[C83380E_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

SPECIAL FEATURE — PAPERLESS
OPTIONAL — LAPTOP

Advanced Excel Reporting: Best Practices, Tools, and Techniques

LEVEL Advanced

Prerequisite

Strong working knowledge of Excel 2010 or newer.

Special Note

This is NOT a hands-on seminar. The course will be taught in Excel 2016 with reference to the differences to Excel 2013 and 2010. The program focuses on Excel for Windows and we encourage you to bring your windows laptop equipped with Excel 2010 or newer to follow along with the instructor. This is a paperless seminar – see page 78 for details.

Overview

If you need to build advanced Excel reports, including reports where the source data resides in your accounting software or another database, then this seminar should be on your list! You will learn how to use Open Database Connectivity (ODBC) and Online Analytic Processing (OLAP) to connect Excel to external data sources, such as your accounting software database, to extract data for reporting and analysis. You will also learn how to incorporate PivotTables into your reporting routines, including how to add calculations to your PivotTables, group PivotTable data into fiscal reporting periods, and filter your PivotTables using Slicers. You will also learn best practices for presenting compelling and captivating Excel-based reports and charts, and how to use two Excel add-ins – BizNet's Excel Business Information Suite and Microsoft's Power Pivot – to streamline and automate many of the manual processes associated with building Excel-based reports.

Who Should Attend

Accounting and financial professionals who use Excel for reporting and want to reduce the risk of errors, simplify reporting processes, and improve the quality of reports. The focus of this session is on Excel for Windows; however, many of the Excel features discussed are also available in Excel for Mac.

Content

- link and import data from external databases – including multi-table databases – into Excel
- use Tables and PivotTables to create accurate financial reports and analyses
- list and apply Excel shortcuts for formatting financial reports
- implement Excel templates to improve reporting productivity
- identify opportunities to work with third-party tools to streamline reporting in Excel

Seminar Leader

Ward Blatch, CPA, CA

Dec 07	9am-12:30pm	Sutton Place, Vancouver	[C82047A_VA]
Fee $225	PD Passport Valid	1/2 Passport Day	3.5 CPD Hours

NOTABLE FORMAT — HANDS-ON
REQUIRED — LAPTOP + PROGRAM

An End to Manual Effort in Excel: The Power Query Effect

LEVEL Intermediate

Prerequisite

Strong working knowledge of Excel's basic functions as well as working knowledge of pivot tables.

Special Note

This is a hands-on seminar. Please bring a laptop with one of the programs listed below.

- Excel 2010 and the free Power Query download
- Excel 2013 and the free Power Query download
- Excel 2016 (Power Query is built in to the product)

Overview

The sad reality is that not all data is stored in nicely curated databases and often - even when it is - the data analyst doesn't have access. Instead we have to piece together data provided in text files, Excel files, web pages and even the body of emails to build the business intelligence solutions we need. Until now this has been a painful process with a great deal of cut and paste effort, and updates have been tedious and error prone. That stops today.

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.

Who Should Attend

Anyone who needs to pull data into Excel, clean it up and/or consolidate it. Please note that you must bring your own laptop, and ensure you have all the prerequisites listed above before attending the seminar.

Content

- import data from text files and web pages
- append data from one table to another
- merge two data sets together
- import all files in a folder in one shot
- un-pivot tables with ease
- create dashboards from email in minutes

Comments from Past Attendees

"Excellent instructor, very funny and helpful and really knew his topic." "Would recommend for anyone who wants to learn about power query!" "Very good topic and very useful information." "Highly educational and very enjoyable."

Seminar Leader

Ken Puls, FCPA, FCMA

Dec 10	9am-5pm	Marriott Inner Harbour, Victoria	[C83011B_VI]
Dec 12	9am-5pm	Executive Plaza, Coquitlam	[C83011C_CO]
Mar 11	9am-5pm	Sutton Place, Vancouver	[C83011D_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

TITLE STATUS: NEW
OPTIONAL: LAPTOP

Blockchain for Accountants

LEVEL Introductory

Prerequisite

A basic understanding of how to connect to the internet on computing and mobile devices, and navigate online.

Special Note

This is a paperless seminar – see page 78 for details.

Overview

This course provides a concise overview of blockchain - an online system of shared databases and distributed ledgers. The system allows authorized groups and individuals to securely certify transactions between parties, and track virtually anything of value - assets, ownership, identity, contracts, health records, educational credentials and much more.

Who Should Attend

Practitioners who want a basic understanding of blockchain and how to start applying the technology in their own operations and workflow.

Content

- what blockchain is - and what it's not (it's NOT bitcoin!)
- blockchain's multiple – and profound - implications for the accounting profession
- leading blockchain operations and examples to date
- public vs. private blockchains
- blockchain's many applications that go far beyond accounting and finance
- key blockchain resources and communities online
- blockchain starter strategy for accountants

Seminar Leader

Garrett Wasny, MA, CMC, CITP/FITP

Oct 25	9am-12:30pm	UBC Robson, Vancouver	[C82005A_VA]
Oct 30	9am-12:30pm	Marriott Inner Harbour, Victoria	[C82005B_VI]
Mar 06	1:30pm-5pm	Sheraton Guildford, Surrey	[C82005C_SU]
Fee $225	PD Passport Valid	1/2 Passport Day	3.5 CPD Hours

NOTABLE FORMAT: HANDS-ON
REQUIRED: LAPTOP + PROGRAM

Building a Financial Model of a Company

LEVEL Intermediate

Prerequisite

Fundamental knowledge of accounting and capability working with Excel.

Special Note

This is a hands-on seminar. Please bring a laptop with Windows-based Excel (any version) installed. The seminar is not intended for macOS-based Excel.

Overview

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. It will cover 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.

Who Should Attend

Those who want to design and create a dynamic financial model of a company that adheres to the highest industry standards.

Content

- design and structure a financial model
  - design and layout a financial model clearly and logically
  - discuss the need for a model to serve as a marketing tool
  - create clearly defined inputs and assumptions sections
  - connect strings of data to create assumptions and footnotes
- build powerful scenarios and financial statements
  - use switches to create effective scenarios and value drivers
  - forecast and build-up a company's revenues and expenses
  - design and incorporate a company's income statement, balance sheet and cash flow statement
- incorporate all relevant schedules
  - construct all necessary schedules, including: depreciation/CAPEX schedule; working capital schedule; income tax schedule; debt and interest schedule; shareholders' equity schedule
  - use Lookup functions within the model to effectively extract information
  - properly incorporate Senior Term Debt with an amortizing repayment schedule
  - create a robust Bank Operating Line (or Revolving Credit Facility)
  - design and incorporate a cash sweep for a company's Bank Operating Line
  - balance the company's balance sheet

Seminar Leader

The Marquee Group

Nov 28	9am-5pm	Sutton Place, Vancouver	[C83021A_VA]
Mar 05	9am-5pm	Sutton Place, Vancouver	[C83021B_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

SPECIAL FEATURE — PAPERLESS | OPTIONAL — LAPTOP

Cloud Computing: The Future is Here

LEVEL Intermediate

Prerequisite

Fundamental knowledge of computer operations and internet usage.

Special Note

This is NOT a hands-on seminar. This is a paperless seminar - see page 78 for details.

Overview

"Cloud Computing." You've heard the term, but what does it really mean and how will it impact you both personally and professionally? In this seminar, you will learn the fundamentals of cloud computing, including what cloud computing really is. The course then shifts into a discussion to help you understand if cloud computing might be right for your organization or for your clients. Learn about the leading providers of cloud-based services and which of their solutions might be right for your organization or for your clients. Leading solutions from organizations such as Azure, Microsoft, Google, Zoho, Thomson Reuters, CCH, Intuit, Intacct, Sage, Salesforce.com, Wave, XCM Solutions, Bill.com, VMWare, Amazon, Concur, Cloud9 Real Time, HubDoc and many others will be reviewed to help you understand the opportunities that exist today to move your organization forward and begin increasing the return on your investment in technology. A special focus of this seminar is the impact that cloud computing will have on the accounting profession.

Who Should Attend

Accountants and other business professionals who wish to enhance their knowledge of leading-edge technologies such as cloud computing.

Content

- define "cloud computing" and distinguish between cloud computing services
- determine if cloud computing is right for your organization
- identify the major cloud computing vendors and the key solutions provided by each of these vendors
- develop a road map for selecting a cloud-based solution and migrating to it
- potential pitfalls associated with cloud-based solutions – such as security and data availability – and identifying means of avoiding these hazards
- establish an appropriate strategy for storing data in the Cloud

Seminar Leader

Ward Blatch, CPA, CA

Dec 10	9am-5pm	Van Conv Ctr West, Vancouver	[C83040A_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

NOTABLE FORMAT — HANDS-ON | REQUIRED — LAPTOP + PROGRAM

Creating Vibrant Dashboards

LEVEL Intermediate to Advanced

Prerequisite

Fundamental knowledge of Excel.

Special Note

This is a hands-on seminar. Please bring a laptop with Excel 2007 or higher.

Overview

How many times, after presenting the statements you've worked so hard on, do your audiences' eyes glaze over? It's awful, but it highlights something really important … often the way we present our work isn't ideal.

In this seminar we'll look at different ways to present our information, telling a story using effective data visualization tools in Excel. We'll examine charts, graphs, conditional formatting and other techniques, pulling the results into a dynamic and engaging dashboard; a one-stop report that gives us an overview of the key metrics we want to see for a hypothetical business need.

Who Should Attend

Accountants and other professionals who need to be able to share information visually and engage their audience.

Content

This seminar will focus on strategies and tools that can be used to summarize key business metrics for presentation, including

- best practices rules for creating effective charts
- building basic charts (line and bar)
- modifying chart elements
- creating combination charts
- building interactive charts
- advanced chart types
- conditional formatting tools and tricks
- custom number formatting techniques
- putting them all together in a dashboard

Comments from Past Attendees

"Excellent seminar! Awesome instructor." "Instructor was very knowledgeable and had great passion for the subject!" "Very interesting and engaging."

Seminar Leader

Ken Puls, FCPA, FCMA

Oct 22	9am-5pm	Sutton Place, Vancouver	[C83010B_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

NOTABLE FORMAT: HANDS-ON | REQUIRED: LAPTOP + PROGRAM

Data Analysis Expressions with PowerPivot

LEVEL Advanced

Prerequisite

Fundamental knowledge of and capability working with Excel 2010 or newer. In addition, please see Special Note below.

Special Note

This is a hands-on seminar. Please bring a laptop with one of the programs listed below.

- Excel 2010 and the free PowerPivot download
- Excel 2013 Professional Plus (volume license) or ProPlus (Office 365 Subscription)
- Excel 2016 Professional Plus (volume license) or ProPlus (Office 365 Subscription)

Please carefully check to ensure that the PowerPivot Tab is showing in Excel before arriving at the course. Note that MAC Excel: PowerPivot CANNOT be installed in any version.

Overview

PowerPivot is revolutionizing the way that we look at data inside Microsoft Excel. Allowing us to link multiple tables together without a single VLOOKUP statement, it enables us to pull data together from different tables, databases and even external sources, where we never could before. But linking data from multiple sources, while powerful, only scratches the surface of the impact that it is making in the business intelligence landscape. Have you ever wanted to have a field on your pivot table that shows month to date for the same month last year? To get the most from PowerPivot you need to understand DAX, a structured language for querying data. With that knowledge, you can create measures and calculated fields that you never thought possible, and build models that are quick to calculate and easy to maintain.

Who Should Attend

Accountants and data professionals who are responsible for building business intelligence reports.

Content

This seminar covers

- building a PowerPivot data model
- sorting and filtering PowerPivot models
- how the DAX engine calculates measures and calculated fields
- understanding "Filter Context"
- building basic DAX measures from scratch
- incorporating conditional logic using HASONEVALUE() and CALCULATE()
- building measures to look at different date contexts
- performance considerations

Seminar Leader

Ken Puls, FCPA, FCMA

Oct 23	9am-5pm	Sutton Place, Vancouver	[C83030B_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

SPECIAL FEATURE: PAPERLESS | OPTIONAL: LAPTOP

Excel: Integrating and Preparing Budgets & Forecasts

(formerly Excel Budgeting & Forecasting Techniques)

LEVEL Intermediate

Prerequisite

Fundamental knowledge of Excel 2010 or newer.

Special Note

This is NOT a hands-on seminar. The course will be taught in Excel 2016 with reference to the differences to Excel 2013 and 2010. The program focuses on Excel for Windows and we encourage you to bring your windows laptop equipped with Excel 2010 or newer to follow along with the instructor. This is a paperless seminar – see page 78 for details.

Overview

Are your budgeting and forecasting processes working as well for you as they should? Probably not, as many organizations report that budgeting and forecasting activities consume tremendous amounts of time and yield only marginal benefits. In this course, you will learn how to achieve a greater return on your budgeting and forecasting activities by taking advantage of various tools and techniques. You will learn how to account for risk and uncertainty in your budgeting and forecasting models and why doing so is a best practice for more meaningful budgets and forecasts.

Who Should Attend

Accountants and users of Excel 2007, 2010, 2013, or 2016 who want to save time and improve the quality of their budgets and forecasts.

Content

- utilize processes for obtaining budget data and collaborating with others when using Excel including Shared and Merged Workbooks, Excel's Audit Trail, controlling and validating data input, and collaborating with others
- apply various Excel techniques for interacting with the accounting system, such as Office Data Connections, Open Database Connectivity, importing text files, and linking Internet-based data into budgeting and forecasting models
- identify situations in which various Excel techniques are appropriately implemented, such as using Data Tables for sensitivity analysis, working with Excel's Goal Seek feature, using Solver to maximize scarce resources, working with Scenario Manager, forecasting with Regression Analysis, and analyzing risk with Monte Carlo simulations
- implement various Excel functions – including NPV, IRR, XNPV, and XIRR – in capital budgeting situations, and identify the various methods by which Excel computes depreciation
- compare and contrast Excel with other applications used for budgeting and forecasting activities

Seminar Leader

Karen Granville, Hons. BMath

Mar 13	9am-5pm	Sutton Place, Vancouver	[C83070B_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

NOTABLE FORMAT: HANDS-ON
REQUIRED: LAPTOP + PROGRAM

Excel: Specific Skills for Budgeting, Planning and Forecasting

(formerly Excel Budgeting and Techniques Hands-on)

LEVEL Intermediate

Prerequisite
Fundamental knowledge of Excel 2007 or newer.

Special Note
This is a hands-on seminar.
Attendees are required to bring their own laptop with Excel 2007 or higher installed.

Overview
If you need help to improve budgeting, planning and forecasting processes in your business, then this hands-on workshop will help you apply specific skills in Excel to do just that. You will work with the many Excel features such as data consolidation for budgets, securing workbooks, forecasting and charting techniques for presentation of budgets.

Who Should Attend
CPAs, students, and accounting and business professionals who would like to gain more practical experience in Excel reporting and using statistical data. Those interested in financial modeling in Excel may wish to take Excel Financial Models and Analysis instead.

Content
- best practices for designing budget templates
- Excel features to secure worksheets for sharing and collaboration
- ‘what-if’ analysis tools for forecasting and planning
- consolidate multiple budgets with PivotTables
- chart techniques for budget presentation
- consolidate data from multiple workbooks or worksheets
- simplify the budgeting process with Macros
- workbook sharing and collaboration with Office 365
- protect your worksheets

Seminar Leader
Richard Jang, BCom, DipIT, MCP, CPA, CGA

Nov 26	9am-5pm	Sutton Place, Vancouver	[C83320B_VA]
Feb 13	9am-5pm	Sutton Place, Vancouver	[C83320C_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

NOTABLE FORMAT: HANDS-ON
REQUIRED: LAPTOP + PROGRAM

Excel: Specific Skills for Creating Custom Solutions with Macros

(formerly Excel Macros Hands-on)

LEVEL Intermediate

Prerequisite
Fundamental knowledge of Excel 2007 or newer.

Special Note
This is a hands-on seminar.
Attendees are required to bring their own laptop with Excel 2007 or higher installed.

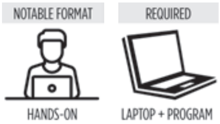
Overview
Do you perform a task repeatedly in Microsoft Excel and have to remember each step? Do you wish you could just hit one single key? You can! We will show you how to automate the task with a macro. A macro is a string of instructions or keystrokes. With a single keystroke, you can play back these activities much faster than performing them manually. Macros are a wonderful timesaver and eliminate the risk of error that can typically occur when carrying out repetitive tasks. Discover the tools and techniques that will allow you to build customized Excel solutions for automating repetitive tasks, building financial models and integrating with Microsoft Word or Access.

Who Should Attend
CPAs, students, accounting and business professionals who want to apply Excel’s Macro capabilities for creating custom Excel solutions for their business, quickly and efficiently.

Content
- Visual Basic Editor - using it to create and manage your macros
- record macros – advantages, limitations & improving the results
- create custom user defined functions
- the macro language and how to use it effectively for interacting with Excel, including how to create Excel forms for data input and interactive dashboards, and techniques for automating spreadsheets
- apply macros for creating financial models and integrating Excel with other programs
- debug macros – what to do when your macros misbehave

Seminar Leader
Richard Jang, BCom, DipIT, MCP, CPA, CGA

Oct 26	9am-5pm	Four Seasons, Vancouver	[C83310B_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours



Excel: The Next Level of Skills

(formerly Excel Advanced Hands-on)

LEVEL Advanced

Prerequisite

Intermediate knowledge of and capability working with Excel 2007 or newer.

Special Note

This is a hands-on seminar.
Attendees are required to bring their own laptop with Excel 2007 or higher installed.

Overview

It is time to take your Excel skills to the next level! Discover the best features and functions in Excel to make your accounting and finance tasks easier, faster and more accurate. This hands-on workshop will provide you with the skills for creating and editing macros, conditional formatting and data validation. Learn how to bring data into Excel from databases and use PivotTables for creating presentations in Word and/or PowerPoint. This seminar will cover many advanced features of Excel to make your work easier and increase the sophistication of your data analysis and reporting.

Who Should Attend

CPAs, students, and accounting and business professionals who want to learn advanced Excel features and functions, and their application to business.

Content

- create Excel Tables and PivotTables for analysis and reporting
- extract and manipulate data from data sets for PivotTables
- 'what-if' analysis using Data Tables, Scenario Manager and Goal Seek
- record and edit Macros with the Visual Basic Editor
- integrate Excel with other Office programs such as MS-Word
- consolidate data from multiple workbooks or worksheets
- workbook sharing and collaboration with Office 365

Seminar Leader

Richard Jang, BCom, DipIT, MCP, CPA, CGA

Nov 07	9am-5pm	Executive Plaza, Coquitlam	[C83290B_CO]
Nov 09	9am-5pm	Marriott Inner Harbour, Victoria	[C83290C_VI]
Dec 04	9am-5pm	Sheraton Guildford, Surrey	[C83290D_SU]
Feb 07	9am-5pm	Sutton Place, Vancouver	[C83290E_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

Excel Boot Camp

LEVEL Intermediate

Prerequisite

Fundamental knowledge of Excel 2010 or newer.

Special Note

This is a hands-on seminar.
Please bring a laptop with Excel 2010 or higher with you to the class. The seminar will focus on Excel for Windows and is not intended for Excel for macOS. It will be taught in Excel 2016, with reference to the differences to Excel 2013 and 2010. This is a paperless seminar – see page 78 for details.

Overview

By using accounting-centric examples, developed for accountants by accountants, this intensive two-day program will take you through Excel from A to Z and show you how to elevate your use of Excel to the next level. In addition to long-standing features in Excel such as lookup functions, the Camera tool, and formatting options, this boot camp will highlight the number of recent improvements to Excel including additions to the function library, tables, a vastly improved charting engine, and an overhaul of PivotTable functionality. You will also learn various techniques for enhancing, not only your efficiency, but also your effectiveness, when working with Excel by taking advantage of a wide variety of "power features" to assist you in creating accurate spreadsheets in a fraction of the time previously required.

Who Should Attend

Excel users and potential Excel users who want to increase their efficiency and effectiveness with Excel. The focus of this session is on Excel for Windows; however, many of the Excel features discussed are also available in Excel for Mac.

Content

- various tips, tricks, and techniques to address issues such as formatting, AutoCorrect, handling dates and times, and selecting cells with special characteristics
- Excel's formula-building tools
- how and when Excel's Table feature should be used
- complex formulas, including those containing arrays and SUMIFS, VLOOKUP, HLOOKUP, INDEX, and MATCH functions
- various techniques for securing Excel workbooks
- charts that captivate audiences and communicate effectively
- six components of PivotTables and create PivotTables, including PivotTables that perform user-defined calculations
- the Camera function in creating custom reports
- the Macro Recorder tool in creating simple, yet very useful, macros that you can put to work right away

Seminar Leader

Karen Granville, Hons. BMath

Nov 06-07	9am-5pm	Sutton Place, Vancouver	[C84020B_VA]
Fee $785	PD Passport Valid	2 Passport Days	14 CPD Hours

SPECIAL FEATURE: PAPERLESS
REQUIRED: LAPTOP + PROGRAM

Excel Dashboards

LEVEL Advanced

Prerequisite

Intermediate knowledge of and capability working with Excel 2007 or newer.

Special Note

This is NOT a hands-on seminar, but feel free to bring your windows laptop equipped with Excel 2010 or newer to follow along The seminar will be taught in Excel 2016 with reference to the differences to Excel 2013 and 2010. It will focus on Excel for Windows This is a paperless seminar - see page 78 for details.

Overview

Dashboard reporting is rapidly becoming the norm for organizations seeking to improve financial and operational reporting processes. Dashboards allow recipients easy access to mission-critical data, usually in an on-demand environment, thereby allowing users to get the information they need when they need it. With greatly enhanced charting and graphing capabilities, along with the ability to handle much larger volumes of data, Excel is an ideal tool for creating high-impact dashboards in businesses of all sizes.

This seminar will show you how to build Excel-based dashboards that extract information from your accounting application along with other databases, and to present this data as actionable information in a dashboard setting.

Who Should Attend

Accountants and users of Excel 2010, 2013, or 2016 who want to learn how to use Excel to create dashboards.

Content

- building blocks of Excel-based Dashboards - open database connectivity, conditional formatting, tables, defined names and dynamic defined names, form controls, and Excel's RANK function - and how to use each of these in an Excel-based Dashboard environment
- processes for creating, formatting, and manipulating charts in Excel including charts based on tables, charts with dynamic text boxes, charts with conditional formatting, interactive charts, sparklines, and drill down charts
- relevance of PivotTables and PivotCharts in an Excel-based Dashboard environment, and how to create PivotTables and PivotCharts based on tables as well as dynamic defined names
- how to assemble an Excel-based Dashboard using the components learned in this seminar

Seminar Leader

Marion Williams

Nov 22	9am-12:30pm	Van Conv Ctr West, Vancouver	[C82020A_VA]
Fee $225	PD Passport Valid	1/2 Passport Day	3.5 CPD Hours

TITLE STATUS: NEW
OPTIONAL: LAPTOP

Excel Data Magic, Including Advanced PivotTables & Power Pivot

LEVEL Advanced

Prerequisite

Full understanding of intermediate to advanced PivotTables.

Special Note

This is NOT a hands-on seminar, but feel free to bring your laptop with Excel 2013 or newer if you wish to follow along. The seminar will be taught in Excel 2016 with reference to the differences to Excel 2013. It will focus on Excel for Windows. Many of the concepts taught in this course depend upon access to Power Pivot, Power Query, and Power View, available only in the Windows-based premium editions of Excel 2013 and Excel 2016. Power Pivot is available in premium editions of Excel as listed at http://bit.ly/PowerPivotMyExcel. You may download a trial of Office that includes PowerPivot from http://bit.ly/ExcelProPlusTrial. This is a paperless seminar - see page 78 for details.

Overview

You will learn how to use automated data queries to link data from external databases into Excel and then transform this data into Data Models, how to use Power Pivot and CUBE formulas to streamline the process of summarizing and reporting this data, and how to take advantage of advanced features such as Data Analysis Expressions, Key Performance Indicators, Hierarchies, and Dimensions to streamline your reporting processes.

Who ShOuld Attend

Business professionals using the Windows-based premium editions of Excel 2013 and Excel 2016 who are seeking to extend their knowledge of Excel as a reporting tool.

Content

- construct and manage links from external data sources into Excel for the automatic acquisition of data
- define, build, and manage Data Models and build PivotTables from these objects
- create PivotTables using Power Pivot, including PivotTables that summarize data from multiple data sources
- utilize Data Analysis Expressions and other tools to add calculations to PivotTables
- add features such as Key Performance Indicators, Dimensions, and Hierarchies to Power Pivot-based PivotTables
- create compelling visualizations of the data in your Power Pivot-based PivotTables using PivotCharts and Power View

Seminar Leader to be drawn from

Ward Blatch, CPA, CA
Karen Granville, Hons. BMath
Marion Williams

Nov 05	9am-5pm	Best Western, Terrace	[C83016A_TE]
Nov 08	9am-5pm	Sutton Place, Vancouver	[C83016B_VA]
Nov 09	9am-5pm	Ramada Hotel, Kelowna	[C83016C_KE]
Nov 19	9am-5pm	Quality Inn, Abbotsford	[C83016D_AB]
Nov 26	9am-5pm	Best Western, Courtenay	[C83016E_CR]
Dec 13	9am-5pm	Marriott Inner Harbour, Victoria	[C83016F_VI]
Mar 14	9am-5pm	Sheraton Guildford, Surrey	[C83016G_SU]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

NOTABLE FORMAT: HANDS-ON
REQUIRED: LAPTOP + PROGRAM

Excel Financial Models and Analysis

LEVEL Advanced

Prerequisite

Intermediate knowledge of Excel 2007 or newer.

Special Note

This is a hands-on seminar.
Attendees are required to bring their own laptop with Excel 2007 or higher installed.

Overview

Financial models are mathematical models where variables are linked together to perform calculations. The calculations are analyzed, and based on the information retrieved, can be used to make business decisions. Excel provides an outstanding toolset for creating such financial models. 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 BI features in Excel for reporting and presentation.

Who Should Attend

CPAs, students, accounting and business professionals looking to improve their skills using Excel for financial modeling, reporting and analysis. Those interested specifically in budgeting and forecasting may wish to take *Excel - Specific Skills for Budgeting, Planning and Forecasting* instead.

Content

- techniques for building flexible models in Excel
- audit tools to ensure model integrity
- make decisions under uncertainty using 'What-if' tools
- apply Excel's Scenario and Solver features to models
- use data tables and charts for analysis
- apply Macros to modeling and analysis
- build Executive Dashboards with Excel's BI Tools

Seminar Leader

Richard Jang, BCom, DipIT, MCP, CPA, CGA

Oct 19	9am-5pm	Sutton Place, Vancouver	[C83260B_VA]
Nov 16	9am-5pm	Marriott Inner Harbour, Victoria	[C83260C_VI]
Nov 21	9am-5pm	Coast Capri, Kelowna	[C83260D_KE]
Feb 19	9am-5pm	Sutton Place, Vancouver	[C83260E_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

SPECIAL FEATURE: PAPERLESS
OPTIONAL: LAPTOP

Excel Macros Demystified

(formerly Excel Macros)

LEVEL Introductory

Prerequisite

Strong working knowledge of Excel's basic functions.

Special Note

This is NOT a hands-on seminar, but feel free to bring your laptop with Excel 2010 or newer if you wish to follow along. This seminar will be taught in Excel 2016 with reference to the differences to Excel 2013 and 2010. It will focus on Excel for Windows. This is a paperless seminar – see page 78 for details.

Overview

You have used Excel for years and Lotus prior to that. During this time, you have said repeatedly, "one day, I'll learn how to write macros." Well, that time has arrived because this half-day seminar will introduce you to the wide world of macros and Visual Basic for Applications (VBA) in Excel. You will learn how to use Excel's Macro Recorder to write simple, yet effective, macros; secure and share macros with other Excel users; create user-defined functions to solve specific accountant-centric problems in Excel; and create macros that run automatically when a user opens a workbook.

Who Should Attend

Accounting and financial professionals in all facets of the profession seeking to extend Excel's functionality with simple, yet highly-effective, macros.

Content

Designed for those with little, if any, experience working with macros, this seminar will teach the fundamentals of creating and working with macros in Excel, including

- create a macro in Excel using the Macro Recorder tool
- manage the fundamental elements of macros in Excel, including accessing macro functionality, naming macros, shortcut keys, storing and deleting macros, absolute vs. relative cell references in macros, and macro security
- identify the usefulness of the Macro Recorder and list four key limitations of the Macro Recorder; additionally, modify Excel's Quick Access Toolbar and the Ribbon to provide shortcuts to macros
- list the nine key elements of macros written using Visual Basic for Applications and utilize the Visual Basic Editor; manage macros through copy/paste and delete processes
- create variables in macros and identify the purpose of branching and conditional logic routines such as IF/THEN/ELSE, DO/WHILE, and CASE

Seminar Leader

Marion Williams

Nov 22	1:30pm-5pm	Van Conv Ctr West, Vancouver	[C82040A_VA]
Dec 14	1:30pm-5pm	Marriott Inner Harbour, Victoria	[C82040B_VI]
Mar 14	1:30pm-5pm	Sutton Place, Vancouver	[C82040C_VA]
Fee $225	PD Passport Valid	1/2 Passport Day	3.5 CPD Hours

SPECIAL FEATURE — PAPERLESS | OPTIONAL — LAPTOP

Excel Tips, Tricks and Techniques for Accountants

LEVEL Intermediate

Prerequisite

Fundamental knowledge of Microsoft Office Excel 2007 or newer.

Special Note

This is NOT a hands-on seminar. The course will be taught in Excel 2016 with reference to the differences to Excel 2013 and 2010. The program focuses on Excel for Windows and we encourage you to bring your windows laptop equipped with Excel 2010 or newer to follow along with the instructor. This is a paperless seminar – see page 78 for details.

Overview

This highly acclaimed seminar contains hundreds of tips, tricks, and techniques to improve your productivity and accuracy. It has six major areas of topical coverage: productivity tips and tricks, formatting essentials, customizing Excel, formula-building essentials, three-dimensional workbooks, and printing essentials.

Who Should Attend

Excel users with any level of experience, who have never taken a formal Excel training course for accountants.

Content

- identify situations in which various Excel features can increase productivity and apply each of these techniques in context, such as Freeze Panes, Split Windows, selecting cells with special characteristics, AutoCorrect, the Office Clipboard, and Paste Special
- implement tools and techniques for formatting data in Excel, including multiline column headings, the Accounting Format, custom date and number formats, and Conditional Formatting
- customize Excel's user environment, including the Ribbon and the Quick Access Toolbar, adjust Excel's Options to improve efficiency, and create and use Templates to increase efficiency and productivity
- utilize various formula building tools to create formulas more efficiently and create various types of formulas, including formulas to manipulate text and dates, formulas containing VLOOKUP and HLOOKUP functions, formulas that contain conditional calculations, and formulas that contain circular references
- link data across multiple Excel worksheets and workbooks, update and manage links, and create sum-through formulas and rolling reports
- implement procedures for producing Excel-based reports, including adjusting print settings, using the Camera feature to create report forms, and working with Custom Views to automate print settings

Seminar Leader to be drawn from

Karen Granville, Hons. BMath
Marion Williams

Nov 20	9am-5pm	Van Conv Ctr West, Vancouver	[C83110C_VA]
Nov 23	9am-5pm	Coast Hotel, Kamloops	[C83110D_KA]
Nov 27	9am-5pm	Van Island Conf Ctr, Nanaimo	[C83110E_NA]
Mar 15	9am-5pm	Sheraton Guildford, Surrey	[C83110F_SU]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

NOTABLE FORMAT — HANDS-ON | REQUIRED — LAPTOP + PROGRAM

Financial Model: Merger Modeling

LEVEL Intermediate to Advanced

Prerequisite

Fundamental knowledge of Excel.

Special Note

This is a hands-on seminar. Please bring a laptop with Windows-based Excel (any version) installed. The seminar is not intended for macOS-based Excel.

Overview

This hands-on course will focus on the skills required to design and create a powerful model to analyze the impact of a merger or acquisition. The seminar will be taught from the perspective of finance professionals who need to quickly assess the impact of a merger between publicly traded companies. At the end of this seminar, participants will be able to discuss the rationale for merger models; review the various assumptions required to prepare a merger model; calculate the impact of mergers and acquisitions on a buyer's financial statements; and understand accretion and dilution concepts.

Who Should Attend

Finance professionals and anyone who is required to assess the impacts of potential mergers and acquisitions.

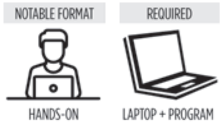
Content

- review M&A considerations
  - discuss rationale for merger models
  - review different approaches
  - discuss various other analyses (i.e. analysis at various prices, contribution analysis, break-even analysis)
- build a merger model
  - review various assumptions
  - identify potential synergies
  - use various forms of consideration in an acquisition
  - calculate the impact of mergers and acquisitions on a buyer's financial statements
  - calculate pro forma ownership positions
  - review and incorporate various checks
  - incorporate powerful Excel tools to sensitize the outputs
  - create summary analysis to synthesize and display important information
  - transform a single merger model into a powerful tool that can quickly analyze the impact of a company making any one of a number of acquisitions
- incorporate accretion/dilution analysis
  - understand accretion and dilution concepts
  - review the limitations of accretion/dilution calculations and incorporate post-transaction analyses to enhance the model's ability to serve as a decision-making tool

Seminar Leader

The Marquee Group

Mar 06	9am-5pm	Sutton Place, Vancouver	[C83080A_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours



Financial Model: Mining Financial Modeling – Understanding and Analyzing a Mining Company

LEVEL Intermediate to Advanced

Prerequisite

Fundamental knowledge of Excel.

Special Note

This is a hands-on seminar. Please bring a laptop with Windows-based Excel (any version) installed. The seminar is not intended for macOS-based Excel.

Overview

This course focuses on the skills required to design and create a dynamic financial model of a mining company that is developing an open-pit mine to produce base and precious metals. Issues related to mining, milling and processing will be discussed. The course material includes model design, logic, construction and financial concepts to create a best-in-class financial model of a mining company. Various intermediate Excel tools along with helpful keyboard shortcuts will also be covered throughout the course.

Who Should Attend

Accountants who are interested in enhancing their skills required to design and create financial models of mining companies.

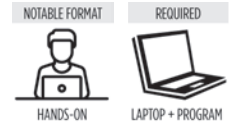
Content

- design and structure a financial model
  - design and layout a financial model clearly and logically
  - discuss the need for a model to serve as a marketing tool
  - create clearly defined inputs and assumptions sections
- build powerful scenarios and financial statements
  - use switches to create effective scenarios and value drivers
  - forecast and build-up the project's revenues and expenses
  - construct all necessary schedules
  - develop a cash flow projection for the mining company
  - forecast the company's financial statements
- evaluate the project and the company
  - incorporate a schedule to evaluate the project's returns
  - build a detailed summary page to display the results
  - use various sensitivity tools to sensitize the project's returns
  - conditionally format output tables to highlight specified results

Seminar Leader

The Marquee Group

Mar 07	9am-5pm	Sutton Place, Vancouver	[C83084A_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours



Financial Modeling – DCF Valuation Analysis

LEVEL Intermediate

Prerequisite

Fundamental knowledge of accounting and capability working with Excel.

Special Note

This is a hands-on seminar. Please bring a laptop with Excel (any version) installed.

Overview

This seminar will focus on the steps required to properly value a company using the Discounted Cash Flow (DCF) methodology. Participants will learn to recognize and avoid the five most common errors finance professionals make when creating DCF analysis. They will learn a methodology for creating and analyzing a DCF financial model using Excel as a tool for calculation and analysis, and gain a more advanced level of knowledge on Excel tools that will help them in performing analytics.

Who Should Attend

Those who are involved in valuing companies or assets, or professionals who are required to audit the valuation analysis prepared by others.

Content

- various valuation methodologies and the appropriateness of using a DCF methodology to value a business
- calculate a company's levered or unlevered free cash flow
- build a terminal year in the model to create a steady-state perpetual cash flow
- review critical terminal year assumptions including Capex, working capital, margins and income taxes
- calculate the tax impact of unlevering cash flows
- two common styles to create a DCF analysis
- calculate the company's cost of capital and choose an appropriate weighted average cost of capital (WACC) range
- discount the cash flows in the forecast period and ensure that the cash flows are discounted to the correct period
- review the distinction between using Excel's NPV and XNPV functions
- various methodologies to value the terminal period
- common discounting errors and the magnitude of discounting the cash flows to the wrong time period
- powerful Excel tools to sensitize the outputs
- appropriate credit ratios that impact a company's covenants
- "flags" to warn the user when covenant has been tripped
- format output tables to highlight specific results

Comments from Past Attendees

"Excellent seminar and instructor." "Best PD course I've been to in years." "Excellent topic."

Seminar Leader

The Marquee Group

Nov 29	9am-5pm	Sutton Place, Vancouver	[C83060A_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

Financial Modeling in Excel

LEVEL Intermediate

Prerequisite

Fundamental knowledge of Excel.

Special Note

This is a hands-on seminar.
Please bring a laptop with Excel (any version) installed. You will be emailed Excel templates which you will need to load onto your laptop.

Overview

This full-day interactive seminar will enable participants to confidently build a suite of forecast financial statements for a company in Excel using best modeling practice. Participants will learn how to build complex calculations as a number of simple, transparent parts that are easy to audit, perform "what if" scenario analysis recording base case, and other scenarios all in the one model, perform sensitivity analysis to identify the model's critical assumptions and audit a model's integrity using Excel's in-built features and test data.

Who Should Attend

Accountants and other professionals who want to learn how to use Excel to build better financial models.

Content

- structuring a spreadsheet model using best practice
- forecasting – operating income
- key design issues – better formulae
- forecasting – operating assets
- forecasting – financial structure
- modeling debt – circular reference
- key design issues – catering for uncertainty
- forecasting – published cash-flow statement
- auditing a model

Comments from Past Attendees

"Very helpful seminar." "Very good course - would recommend to anyone looking for a beginner course on building models." "What I learned during the seminar was very useful and applicable to my daily tasks."

Seminar Leader

Antoine Bishara, CPA, CA, CFA

Nov 01	9am-5pm	Sutton Place, Vancouver	[C83050C_VA]
Feb 13	9am-5pm	Four Seasons, Vancouver	[C83050D_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

From Text Files to BI Solution – Building Business Intelligence with Excel

LEVEL Intermediate

PrerequiSite

Participants must have experience using PivotTables. Some exposure to PowerPivot and Power Query is an asset, but not required.

Special Note

This is a hands-on seminar. Participants should bring a laptop running both Power Pivot and Power Query.

Power Pivot

- Excel 2010 and the free Power Pivot download
- Excel 2013 Professional Plus (volume license) or ProPlus (Office 365 Subscription)
- Excel 2016 Professional Plus (volume license) or ProPlus (Office 365 Subscription)
- Please carefully check to ensure that the Power Pivot Tab is showing in Excel before arriving at the course.

Power Query

- Excel 2010 and the free Power Query download
- Excel 2013 and the free Power Query download
- Excel 2016 (Power Query is built in to the product)

Note that MAC Excel: Power Pivot and Power Query CANNOT be installed in any version.

Overview

Learn how to leverage Power Query and Power Pivot to build full business intelligence solutions from text files and databases, creating refreshable and maintainable solutions. This course works through best practices of sourcing data, building calendar tables, using time intelligent DAX measures, and creating dashboard reports that can be refreshed with two clicks. In Part 1, you'll learn how Power Query can clean up, reshape and combine your data with ease – no matter where it comes from. Part 2 will focus on Power Pivot; a technology that is revolutionizing the way that we look at data inside Microsoft Excel. We'll also look at more advanced DAX measures and adding time intelligence to our models.

Who Should Attend

Anyone who needs to pull data into Excel, clean it up and/or consolidate it, and build reports.

Content

- pivot table review
- importing data with power query
- appending and merging tables
- conditional logic
- introduction to dimensional modeling
- introduction to DAX

Seminar Leader

Ken Puls, FCPA, FCMA

Feb 12-13	9am-5pm	Sutton Place, Vancouver	[C84030B_VA]
Fee $785	PD Passport Valid	2 Passport Days	14 CPD Hours

SPECIAL FEATURE: PAPERLESS | OPTIONAL: LAPTOP

Google is Not Enough: The Best Search Tools You Aren't Using (But Should!)

LEVEL Introductory

Prerequisite

A basic understanding of how to connect to the internet on computing and mobile devices, and navigate online.

Special Note

This is a paperless seminar – see page 78 for details.

Overview

The seminar will provide 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." You'll discover a whole new universe of public records, corporate databases, decision engines, people tracking tools, e-marketplaces, user-generated content and much more that are largely off the Google "radar." Even if you think you're web savvy, you are guaranteed to learn new search strategies, techniques and tools that will take you to the next level of online intelligence gathering.

Who Should Attend

Accounting professionals who wants to diversify and deepen their online discovery skills, explore Google alternatives and discover online business and accounting information not typically listed in Google search results.

Content

- Google myths and blind spots internet searchers must know
- predictive search
- decision engines
- free business magazine and newsletter subscriptions
- internet archives
- web alerts services
- social media search
- information moshpits
- people search; market, business & accounting research
- eMarketplaces
- events
- invisible web
- verticals
- wikis
- question and answer
- online classifieds
- general search tools

Seminar Leader

Garrett Wasny, MA, CMC, CITP/FITP

Oct 29	9am-5pm	Marriott Inner Harbour, Victoria	[C83340B_VI]
Nov 19	9am-5pm	Van Island Conf Ctr, Nanaimo	[C83340C_NA]
Nov 20	9am-5pm	Sheraton Guildford, Surrey	[C83340D_SU]
Nov 22	9am-5pm	Coast Capri, Kelowna	[C83340E_KE]
Dec 11	9am-5pm	Van Conv Ctr West, Vancouver	[C83340F_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

TITLE STATUS: NEW | SPECIAL FEATURE: PAPERLESS | OPTIONAL: LAPTOP

How Technology is Impacting the Accounting Profession

LEVEL Introductory

Prerequisite

A basic understanding of how to connect to the internet on computing and mobile devices, and navigate online.

Special Note

This is a paperless seminar – see page 78 for details.

Overview

The seminar will provide a concise overview of the leading technologies and economic forces that are reshaping the accounting profession. Explore how practitioners are using new cyber tools and platforms to profit and prosper in the face of rapid and seismic change; elevating their role from financial navigators to enterprise co-pilots; keeping up with exploding digital transformation; and translating technology ambitions into practical reality.

Who Should Attend

Practitioners who want to step up their technology game and explore a swirl of new innovation, strategy and data opportunities in today's dynamic accounting world.

Content

- key "SMAC" (social, mobile, analytics and cloud) technology trends in accounting
- 30+ new accounting business models and case studies
- leading skills accountants need to succeed to a tech-enabled future (and how to self-educate now for immediate advantage)
- how to embrace the new normal and thrive in the face of technology change

Seminar Leader

Garrett Wasny, MA, CMC, CITP/FITP

Dec 10	1:30pm-5pm	Van Conv Ctr West, Vancouver	[C82003A_VA]
Fee $225	PD Passport Valid	1/2 Passport Day	3.5 CPD Hours

NOTABLE FORMAT: HANDS-ON | REQUIRED: LAPTOP + PROGRAM

Intro-Mediate Excel Techniques

LEVEL Intermediate

Prerequisite

Working experience with Excel.

Special Note

This is a hands-on seminar. Please bring a laptop with Excel 2007 or higher installed.

Overview

Excel is by far one of the most prolific and most versatile programs installed on desktops today. It's everywhere, and touches most business positions in some way. Yet the reality is that by far the vast majority of Excel users are self-taught. We struggle through the program, learning what we need in order to accomplish our tasks and then… stop learning? The truth is that once we've worked out a method to finish our work, we usually call it a day.

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.

Who Should Attend

Users who are self-taught in Excel and who feel that they may have gaps in their Excel knowledge, especially around the topic outline areas.

Content

- formula & function review: essential math, logic, and text functions, including useful functions you may not have heard of
- mastering VLOOKUP: a deep dive into understanding how VLOOKUP REALLY works, common causes of the dreaded #N/A error, and how to guard against them
- Excel tables – the new way to store data
- instant insights from conditional formatting
- PivotTables: beautifully simple, blazingly fast, and unbelievably useful - from creation to useful formatting tricks

Seminar Leader

Ken Puls, FCPA, FCMA

Dec 13	9am-5pm	Van Conv Ctr West, Vancouver	[C83233B_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

NOTABLE FORMAT: HANDS-ON | REQUIRED: LAPTOP + PROGRAM

Managing Financial Data With Excel

LEVEL Intermediate to Advanced

Prerequisite

Intermediate knowledge of and capability working with Excel.

Special Note

This hands-on seminar will utilize assignments and handouts throughout the day. Please bring a laptop with Excel (any version) installed.

Overview

This intensive hands-on seminar will transform participants into Excel "power users". It will focus on the pertinent Excel tools that are required in a corporate environment to efficiently analyze and manipulate financial data, and to create compelling financial analysis.

Who Should Attend

Anyone who uses Excel regularly.

Content

Data Analysis

- built-in functions to interpret and manipulate data
- use Excel's filters in conjunction with specific arithmetic functions to summarize large volumes of data
- learn to use many features of the Advanced Filter
- incorporate widely used financial and arithmetic functions
- lookup functions
- variety of intermediate and advanced Lookup functions
- learn multiple uses of the VLOOKUP and Offset functions, including ways to automate these functions
- nested formulas that expand the flexibility of functions

Managing Text

- use powerful Text functions to manipulate non-numeric variables
- convert non-recognizable values into useable numbers with the use of Text functions

PivotTables

- become proficient with PivotTables to quickly analyze large quantities of data
- learn to use some of the most effective and lesser known PivotTable features
- other tips, tricks, and keyboard shortcuts to increase efficiency

Comments from Past Attendees

"By far and away, this hands-on experience was the most productive and useful course I have taken." "Great seminar. Liked that it was hands-on and very useful material."

Seminar Leader

The Marquee Group

Nov 27	9am-5pm	Sutton Place, Vancouver	[C83140A_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

NOTABLE FORMAT: HANDS-ON
REQUIRED: LAPTOP + PROGRAM

Modeling Business Cash Flows in Excel

LEVEL Introductory

Prerequisite

None

Special Note

This is a hands-on seminar. Please bring a laptop with Excel (any version) installed. You will be emailed Excel templates which you will need to load onto your laptop.

Overview

This half day "hands-on" workshop explores how to build a robust monthly cash flow forecast model in Excel using modeling best practices. Participants walk away from the workshop with a cash flow model template that can be tailored to their organization.

Who Should Attend

Members in industry or members working with small to mid-sized clients or organizations who are looking at building or improving a weekly or monthly cash flow monitoring model.

Content

- Excel cash flow modeling best practices
- separating cash flow model inputs and outputs
- building flexibility into your cash flow model
- modeling working capital cash flows
- modeling a monthly cash flow statement
- creating a cash flow forecast that can be rolled forward
- undertaking cash flow sensitivity analysis
- the importance of clearly identifying and documenting cash flow assumptions

Seminar Leader

Antoine Bishara, CPA, CA, CFA

Feb 14	9am-12:30pm	Sutton Place, Vancouver	[C82023A_VA]
Fee $225	PD Passport Valid	1/2 Passport Day	3.5 CPD Hours

NOTABLE FORMAT: HANDS-ON
REQUIRED: LAPTOP + PROGRAM

Modeling Project Finance: Real Estate

LEVEL Intermediate

Prerequisite

Fundamental knowledge of, and capability working with Excel.

Special Note

This is a hands-on seminar. Please bring a laptop with Excel (any version) installed. You will be emailed Excel templates which you will need to load onto your laptop.

Overview

Project finance is a growing market with a great deal of activity in both the public and private sectors from real estate to infrastructure (roads, hospitals, alternative energy). This one-day "hands-on" workshop gets participants to model a real estate project's cash flows from land purchase through development to sale. It also covers modeling various forms of debt and equity.

Who Should Attend

Public practitioners with a client base in the development space or those working in finance/accounting roles for companies or government entities undertaking project-based assignments.

Content

- design and structure of an Excel-based project finance model
- understand how project financing (both debt and equity) flow in and out depending on stage of development
- modeling cash flows for a real estate development project
- building in "triggers" and sensitivities to understand a project's exposure to key drivers
- building in ownership and financial structures (debt & equity)

Comments from Past Attendees

"Very useful." "Instructor gave us very useful templates."

Seminar Leader

Antoine Bishara, CPA, CA, CFA

Nov 07	9am-5pm	Sutton Place, Vancouver	[C83071B_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

NOTABLE FORMAT HANDS-ON
REQUIRED LAPTOP + PROGRAM

Optimizing Data for Power Pivot using Power Query

LEVEL Advanced

Prerequisite

Participants must have experience using Power Pivot.

Special Note

This is a hands-on seminar. Participants should bring a laptop running both Power Pivot and Power Query.
Power Pivot

- Excel 2010 and the free Power Pivot download
- Excel 2013 Professional Plus (volume license) or ProPlus (Office 365 Subscription)
- Excel 2016 Professional Plus (volume license) or ProPlus (Office 365 Subscription)
- Please carefully check to ensure that the Power Pivot Tab is showing in Excel before arriving at the course.
- Power Query
- Excel 2010 and the free Power Query download
- Excel 2013 and the free Power Query download
- Excel 2016 (Power Query is built in to the product)

Note that MAC Excel: Power Pivot and Power Query CANNOT be installed in any version.

Overview

You know the scene; you've built a beautiful Power Pivot model that has solved all of your organization's problems. You open it up, click Refresh and wait patiently for all the data to stream in. That's okay, there's a lot of data and you expect that. Then you click a slicer and… wait. Time during the initial data load is one thing, but consumer's patience during use is another. In this session, we'll explore the things you can do to increase your Power Pivot model performance. We'll look at the key factors that affect performance, as well as the things you can do to deal with them. We'll look at how sourcing your data with Power Query can give you ultimate control over your data's size and shape, and tricks to optimize it for Power Pivot consumption.

Who Should Attend

Accountants and data professionals who are building business intelligence reports using Power Pivot and want to help their models perform faster. No Power Query experience is necessary.

Content

- building a PowerPivot data model from text files
- 7 items that impact Power Pivot model performance
- an introduction to Power Query
- staging data with Power Query
- using Power Query to implement optimization techniques
- advanced Power Query techniques

Seminar Leader

Ken Puls, FCPA, FCMA

Mar 12	9am-5pm	Sutton Place, Vancouver	[C83390B_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

SPECIAL FEATURE PAPERLESS
OPTIONAL LAPTOP

Paperless Office

LEVEL Intermediate

Prerequisite

Fundamental knowledge of computer operations.

Special Note

This is NOT a hands-on seminar. This is a paperless seminar – see page 78 for details.

Overview

Would you like to find important documents in 10 seconds or less? Of course you would! At the very least, you would like to have secure, reliable access to information more rapidly than you have today while reducing storage space requirements and costs. No one expects a completely "paperless" office, but everyone would like to have much "less paper" to manage! This seminar will use best practice methods and demonstrate proven processes for document management using simple, inexpensive systems costing a few hundred dollars to comprehensive options complete with workflow.

Who Should Attend

Accountants and other business professionals who are accountable for information, including CFOs, Controllers, CEOs, CIOs, and senior managers in general.

Content

- document management, records management, and business process management; calculating the ROI of paperless; identifying the steps to prepare for paperless
- the need for records retention guidelines and policy
- three components of a paperless office – infrastructure, workflow, and people
- key characteristics of electronic file cabinet solutions and document management solutions and typical costs; key vendors of these solutions and their products and services
- key hardware requirements for moving to paperless including scanners, computers, storage, memory, operating systems, and network considerations
- key data backup, disaster recovery, and business continuity issues; key vendors and the solutions they offer

Comments from Past Attendees

"A good seminar. Lots of useful links and tips." "A good overview of various paperless options." "Lots of practical examples."

Seminar Leader

Ward Blatch, CPA, CA

Dec 11	9am-5pm	Van Conv Ctr West, Vancouver	[C83170B_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

SPECIAL FEATURE PAPERLESS
OPTIONAL LAPTOP

Rapid Dashboard Development with Power BI Desktop

LEVEL Intermediate

Prerequisite

Basic knowledge of Excel. No prior experience with Power BI or Power BI desktop is required.

Special Note

This is a hands-on seminar. Please bring a laptop running the free version of Power BI desktop. As Power BI desktop is updated monthly with new features, we recommend downloading the most recent version available at powerbi.microsoft.com.

Overview

For years, Excel has been the business intelligence tool of choice for accountants and business analysts around the world. In 2015, however, Microsoft released a free software package that has become the hottest software commodity in the business intelligence landscape; Power BI Desktop. Power BI Desktop allows rapid collection and cleaning of data and creates a relational database of the data on the fly. But the best part is that once this work is done it provides access to compelling dashboards that are attractive, interactive and best of all incredibly easy to both build and refresh.

Who Should Attend

Accountants and data professionals who are responsible for building business intelligence reports.

Content

- sourcing data from a variety of sources
- data visualization and transformations
- creating data model relationships
- introduction to DAX measures
- working with interactive visuals
- sharing dashboard solutions personal vs. enterprise

Seminar Leader

Ken Puls, FCPA, FCMA

Dec 14	9am-5pm	Van Conv Ctr West, Vancouver	[C83014C_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

TITLE STATUS NEW
SPECIAL FEATURE PAPERLESS
OPTIONAL LAPTOP

Research Automation Tools for Accountants

LEVEL Introductory

Prerequisite

A basic understanding of how to connect to the internet on computing and mobile devices, and navigate online.

Special Note

This is a paperless seminar – see page 78 for details.

Overview

The seminar will provide a concise overview of new online research tools that allow accountants to automatically gather knowledge on practically any person, place, thing or topic – at no charge. Instead of constantly chasing after information online, discover how to easily set up a cyber recon system that delivers the latest and best news, insights, and disclosures to you - instantly.

Who Should Attend

Practitioners in industry and public accounting who want to tame their information overload, improve how they monitor developments and updates in their functional and industry domains, and better augment their day-to-day decisions with fresh and highly credible online intelligence.

Content

- Google's suite of digital recon tools
- answer engines
- feed readers
- social media
- cyber communities
- web automation services
- digital voice assistants
- online news
- public record trackers
- people background checkers

Seminar Leader

Garrett Wasny, MA, CMC, CITP/FITP

Dec 10	9am-12:30pm	Van Conv Ctr West, Vancouver	[C82004A_VA]
Mar 06	9am-12:30pm	Sheraton Guildford, Surrey	[C82004B_SU]
Fee $225	PD Passport Valid	1/2 Passport Day	3.5 CPD Hours

SPECIAL FEATURE: PAPERLESS | OPTIONAL: LAPTOP

Tech Tools and Gadgets for a More Efficient You

LEVEL Intermediate

Prerequisite

Fundamental knowledge of computer operations.

Special Note

This is NOT a hands-on seminar, but we encourage you to bring your windows laptop equipped with Office 2010 or newer to follow along. The seminar will be taught in Office 2016 with reference to the differences to Office 2013 and 2010. It will focus on Office for Windows. This is a paperless seminar – see page 78 for details.

Overview

Technology – specifically the ever-evolving world of tools, gadgets, and apps – continues to awe and amaze while "The Internet of Things" is rapidly turning this evolution into a revolution. By learning how to utilize these tools and gadgets, you can enhance both personal and team productivity and, in this program, you will learn how to take advantage of many features in tools that you likely already own – such as Microsoft Windows and Microsoft Office – to become more productive. You will also learn about numerous applications and services to help with managing personal finances, creating and organizing notes and to-do lists, speaking text into your computer, invoking handwriting recognition, and improving personal information security. You will witness demonstrations of leading tools, gadgets, and apps – many of which are free – all designed to make you more efficient, effective, and productive.

Who Should Attend

Business professionals seeking to leverage technology for improved personal and team productivity.

Content

- identify opportunities to implement free and inexpensive solutions to address and solve common personal and business issues, including security
- recognize opportunities to use the Cloud as the backbone of a business technology infrastructure
- implement smartphone and tablet apps to connect to, and more efficiently manage, information
- discover hidden features in applications you already own
- troubleshoot and maintain your computer with free and inexpensive tools

Seminar Leader

Ward Blatch, CPA, CA

Dec 12	9am-12:30pm	Van Conv Ctr West, Vancouver	[C82021C_VA]
Fee $225	PD Passport Valid	1/2 Passport Day	3.5 CPD Hours

SPECIAL FEATURE: PAPERLESS | OPTIONAL: LAPTOP

Technology Update

LEVEL Intermediate

Prerequisite

Fundamental understanding of basic technology concepts.

Special Note

This is NOT a hands-on seminar. This is a paperless seminar – see page 78 for details.

Overview

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? If you answered "yes" to any of these questions, then make plans now to invest ½ a day in this fast-paced and highly informative seminar that is sure to ramp up your return on technology investment. The technology tools available to businesses have never been better, but many are not taking full advantage of these tools. This course helps professionals, at all levels, understand the major trends in hardware, software, and services and how to utilize these tools to meet organizational objectives both efficiently and effectively. More than just a seminar on the latest computers, you will learn about the full spectrum of practical technology available to you and your team and how to implement these tools for maximum impact.

Who Should Attend

Business professionals who are interested in how technology affects them and seek an update of relevant technology trends, tools, and techniques.

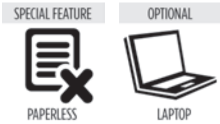
Content

- key features of Windows 10 and situations where upgrading might be advantageous
- developments in mobile technologies and developing an optimal mobile strategy
- security issues facing business professionals and options for mitigating risk
- key features of Office 2016 and determining an optimal time to upgrade
- major trends in hardware, including desktops, laptops, servers, tablets, storage, and printing
- strategies for successful Cloud implementations, including accounting and tax, document management, workflow, and data storage and synchronization applications
- virtualization and how it potentially changes the technology infrastructure in your office

Seminar Leader

Ward Blatch, CPA, CA

Dec 12	1:30pm-5pm	Van Conv Ctr West, Vancouver	[C82130B_VA]
Dec 14	9am-12:30pm	Marriott Inner Harbour, Victoria	[C82130C_VI]
Fee $225	PD Passport Valid	1/2 Passport Day	3.5 CPD Hours



Word, Outlook, and PowerPoint: Tips and Tricks for Enhancing Productivity

LEVEL Intermediate

Prerequisite

Fundamental knowledge of Microsoft Office applications.

Special Note

This is NOT a hands-on seminar but we encourage you to bring your windows laptop equipped with Office 2010 or newer to follow along. The seminar will be taught in Office 2016 with reference to the differences to Office 2013 and 2010. It will focus on Office for Windows. This is a paperless seminar – see next column for details.

Overview

Most likely, you work with Microsoft Office Word, Outlook, and PowerPoint frequently, yet probably have never received any training on how to use these tools to their fullest. In this half-day session, you will learn the best ways to work with Word, Outlook, and PowerPoint, and increase your productivity in the process. Among the topics covered in this seminar are Styles – Word's best feature; exporting a Word document to a PowerPoint presentation; how to manage the email avalanche in Outlook; and using Office Web Apps, SkyDrive, and SkyDrive Pro to work with your data anytime and anywhere.

Who Should Attend

Accounting and financial professionals who want to learn more about using Outlook, Word, and PowerPoint in their business.

Content

- how to increase efficiency by using key, accountant-centric features in Word, Outlook, and PowerPoint
- advantages and risks associated with storing Microsoft Office information in the Cloud
- how to incorporate Office Web Apps into an overall strategy for working with Microsoft Office
- integrate data between various components of Microsoft Office

Seminar Leader

Marion Williams

Mar 14	9am-12:30pm	Sutton Place, Vancouver	[C82050B_VA]
Fee $225	PD Passport Valid	1/2 Passport Day	3.5 CPD Hours

Paperless Offerings at Selected PD Seminars

In response to the growing popularity of e-books and the digital storage of materials, and in trying to conserve print resources, CPABC PD is providing paperless-only offerings for some of our seminars.

Attendees who register for paperless offerings will not receive any printed binders or booklets when they arrive at the course venue. Instead, an email will be sent to registrants 2 business days prior to the course date – this email will contain the web link where registrants can download the materials in PDF format.

How do I access course materials in class?

You have a few options:

- You can download and save the materials onto your laptop or tablet prior to arriving at the course, and then follow along in class with your device – charging stations will be provided.
- You can choose not to bring anything to the course – we can provide a notepad for note-taking if you wish
- Although we do not encourage this, you can print the PDF file and bring the hardcopy with you to the course

Won't it be difficult to follow along with no hard-copy material?

We have carefully selected seminars where following along with printed handouts is not an integral part of the training day. These are seminars where handout materials serve more as future reference than in-class necessity. We will continue to provide printed materials for seminars of a more technical nature, where frequent references are made to course notes throughout the day. As well, some portions of a seminar – case studies, worksheets, and last minute handouts – may still work best in printed form.

Where do I download the e-material and how are they formatted?

- You will receive an email with the course link 2 business days prior to the seminar date
- Materials will be provided in a secured PDF electronic format – you can download this to your computer/electronic device
- Materials will be accessible for download only up to one week after course date

Can I download the material during the course?

Although internet access may be provided on-site at the seminar facility, we strongly recommend that you download and save the PDF file onto your device prior to arriving at the course. We cannot guarantee the speed and quality of internet access at facilities, and we will not be able to provide technical support there should you run into difficulties.

All CPABC PD course materials, either on printed or electronic media, are protected by copyright law. Permission to access and download is granted exclusively to the registered participant of the seminar. Circulation to and use of these materials by individuals other than the registered participant is strictly prohibited.

People Management & Personal Development

Becoming a Skilled Negotiator

LEVEL Introductory

Prerequisite

None.

Overview

A key skill for accountants to succeed in business today is the ability to effectively negotiate with internal and external parties. The basis for successful business relationships has long been the product of negotiation rather than power. To achieve personal business objectives, it is necessary to be able to win support from colleagues and clients and to negotiate effective outcomes. The goal of this interactive course is to 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.

Who Should Attend

Individuals responsible for negotiating with internal clients and external parties, and taking the perspective of establishing and maintaining successful long-term relationships.

Content

In this session you will learn

- best practices on effective commercial negotiations including the benefits of a win-win approach
- methods for dealing with a partner who is not seeking a win-win outcome
- how to establish outcomes including understanding options and appreciating different interests at hand
- preparations for negotiations including the identification of stakeholders and their respective interests
- about the role of values in negotiation
- successful behaviours in support of negotiations
- how to handle manipulation, and manage the personal agendas that can jeopardize successful negotiation

Comments from Past Attendees

"I liked the practical approach of the course." "Excellent! This was the best PD course I've done so far." "Very good! Excellent presenter."

Seminar Leader

Helen Wale, MA, CPHR, CEC

Oct 24	9am-5pm	Four Seasons, Vancouver	[M83490B_VA]
Nov 20	9am-5pm	Delta Ocean Pointe, Victoria	[M83490C_VI]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

Business English for Professionals

LEVEL Introductory

Prerequisite

None.

Overview

The competence level of a business professional is often judged by their ability to communicate in English; this course recognizes and addresses the language challenges faced by many non-native English speaking professionals. The primary objective is to help attendees improve their English communication skills for use in both business and social settings, and increase their confidence when expressing themselves and communicating with professional peers. This interactive course will introduce fundamental communication tools and provide opportunities for practice in realistic business meeting role-play situations.

Who Should Attend

Individuals whose first language is not English wishing to communicate more efficiently and confidently.

Content

In this session, you will learn

- the skills and techniques required for effective communication in a business meeting environment
  - introducing and welcoming participants, reviewing past business, beginning the meeting, discussing agenda items, concluding the meeting
- appropriate and useful phrases, consideration of Canadian culture and manners
  - agreeing and disagreeing politely, providing or asking for an opinion, asking for clarification, suggesting, group dynamics in the workplace, non-verbal communication and signals, cultural values and understanding

Comments from Past Attendees

"The presentation is relevant to my work. It gave me an idea of which areas I need to work on. It was very helpful!" "It was helpful and informative." "Overall this was a very good course."

Seminar Leader

Louis Chang, CPA, CA

Nov 14	9am-5pm	Sutton Place, Vancouver	[M83003B_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

TITLE STATUS

NEW

Business English for Professionals – Level 2

LEVEL Introductory to Intermediate

Prerequisite

Successful completion of *Business English for Professionals*.

Overview

This seminar will build and expand on the language and concepts introduced in *Business English for Professionals*. The core focus will be on speaking and pronunciation, presentation skills, writing, vocabulary, business idioms, grammar and cultural values and understanding in business communication.

By the end of this seminar, participants should have developed skills to make effective presentations in business situations; improved pronunciation weaknesses; expanded business vocabulary; improved business writing skills; expanded English communication skills and guidelines which they can begin to use immediately; improved grammar skills; and a better understanding of the importance that cultural differences play in business communication.

Who Should Attend

Business and accounting professionals whose first language is not English and who would like to continue to improve and develop their business English skills in a comfortable, interactive and supportive environment. This course is intended for non-native English speakers with low-intermediate to intermediate English communication skills.

Content

- speaking and pronunciation: preparing for and participating in debates on business topics; speaking persuasively in English; interviewing skills; pronunciation assessment and techniques; group exercises and role play
- presentation skills: introducing a topic or idea effectively; responding effectively to questions; presentation role play
- writing: recognizing the features of different genres of business correspondence; writing appropriately for intended audience; writing tips; writing exercises
- vocabulary and business idioms: useful and common business vocabulary, idioms and phrases; vocabulary exercises
- grammar: common grammatical errors made by non-native English speakers; grammar exercises
- cultural values and understanding

Seminar Leader

Louis Chang, CPA, CA

Dec 12	9am-5pm	Van Conv Ctr West, Vancouver	[M83005A_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

Clear Thinking/Clear Speaking

LEVEL Introductory to Intermediate

Prerequisite

None

Overview

In this course you will learn to speak clearly and succinctly, in a way that helps your listeners stay focused and value your remarks, even when you have little or no time to prepare. This course will help you learn to respond to questions, speak up at meetings and even feel more comfortable in social situations. While speaking is the primary focus, you will also gain tips to help with tasks like phone messaging, email, and report writing.

Who Should Attend

Individuals at any phase in their career wishing to enhance their communication skills, especially their ease in speaking, and confidence in different (and possibly challenging) situations.

Content

This is a day filled with exercises and activities related to impromptu speaking. You'll be on your feet talking to small groups and offering other speakers your honest feedback. While some theory is presented, this course is focused on practical application.

In this session, you will learn to

- tune in to the real feelings and concerns of your audience
- connect your responses to their interests, needs and concerns
- organize your comments
- use timing to increase the impact of your message
- manage difficult and awkward questions - yet sustain and build goodwill
- stay calm under fire - how to manage audience hostility
- incorporate examples to win their attention at an emotional level
- practice for continual improvement
- never again have to think, "I wish I'd said ..."

Comments from Past Attendees

"One of the best courses I have taken." "Great opportunity to practice speaking in front of others." "This was a fantastic course. I gained so many new tools and I'm looking forward to putting them into practice!"

Seminar Leader

Margaret Hope, M.ED

Nov 06	9am-5pm	Quality Hotel, Abbotsford	[M83150D_AB]
Nov 08	9am-5pm	Four Seasons, Vancouver	[M83150E_VA]
Nov 20	9am-5pm	Delta Ocean Pointe, Victoria	[M83150F_VI]
Mar 05	9am-5pm	Sutton Place, Vancouver	[M83150G_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

Communicating Effectively Under Pressure

LEVEL General

Prerequisite

None

Overview

We have all felt pressured, at one time or another, to respond to a difficult question, opinion, or suggestion. It may be that we require more time to reflect about what is being asked, or we struggle with the question of "should I say what I really think?" Or maybe we are unsure of what we think or what we want.

In this course, we will explore situations where you feel pressure and learn some practical strategies for communicating under pressure.

Who Should Attend

Anyone who has ever felt pressured to respond and struggled with it.

Content

- exploring circumstances where pressure occurs
- managing the conflict within
- saying no
- understanding own style
- understanding stress response
- speaking for own needs
- common pitfalls
- tips and tools for communicating under pressure

Comments from Past Attendees

"The speaker, Pam, was amazing, passionate about her work, and a pleasure to watch and learn from." "Excellent real-life and personal examples to illustrate how to effectively use communication techniques." "Enjoyed the seminar and found it beneficial."

Seminar Leader

Pam Penner

Oct 22	9am-5pm	Coast Capri, Kelowna	[M83219B_KE]
Oct 24	9am-5pm	Victoria Conf Ctr, Victoria	[M83219C_VI]
Oct 26	9am-5pm	Best Western, Terrace	[M83219D_TE]
Nov 06	9am-5pm	Ramada Hotel, Prince George	[M83219E_PG]
Nov 20	9am-5pm	Van Conv Ctr West, Vancouver	[M83219F_VA]
Nov 23	9am-5pm	Best Western, Nanaimo	[M83219G_NA]
Nov 26	9am-5pm	Sheraton Guildford, Surrey	[M83219H_SU]
Dec 13	9am-5pm	Van Conv Ctr West, Vancouver	[M83219I_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

Communicating with Influence

LEVEL General

Prerequisite

None

Overview

One of the crucial keys to success for any professional is being able to communicate ideas and knowledge to all the stakeholders in the organization. This means communicating complex ideas in a fashion that allows everyone – boards, audit committees, line managers, sales people and service staff – to understand what you need to support the overall success of the organization. Communication that is effective, as well as efficient, instills confidence, demonstrates leadership and creates trust in your knowledge and experience. If you've ever been caught in the communication circle of "that's not what I said – that's not what I meant", then you need new skills to clearly and effectively get your message across. This course will support your success as a leader and manager by teaching you how to communicate with influence.

Who Should Attend

Individuals who need to share expertise internally and externally, wanting to improve how they share that knowledge while improve relationships with all stakeholders.

Content

In this session, you will learn

- the basics of communication and how people relate to a message
- to communicate with intention and focus
- how to listen to the other people involved in a conversation
- to identify and incorporate language for effective communication
- about asking open-ended questions
- how tone of voice communicates more than words
- generational communication strategies for communicating with Millennials
- tools for improving daily communication that are easily to incorporate
- how to deliver complex ideas to a non-technical audience in an efficient and effective manner

Comments from Past Attendees

"Great seminar, instructor was delightful and a pleasure to learn from." "Very practical point raised, great models, passionate instructor which made the seminar much more enjoyable."

Seminar Leader

Sharon Edwards

Nov 20	9am-5pm	Van Conv Ctr West, Vancouver	[M83370B_VA]
Mar 11	9am-5pm	Sutton Place, Vancouver	[M83370C_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

Conflict: Changing Viewpoints & Influencing Behaviors

LEVEL Introductory to Intermediate

Prerequisite
None

Overview
Too often our well-intentioned efforts to change the views and behaviours of others leads to escalating emotions and debilitating conflict. And this mismanaged conflict impairs performance and destroys relationships. While most people shy away from conflict, properly handled, it can be a wonderful opportunity for creativity, change, growth and mutual profit improvement. To enhance the quality of your relationships with people who count, you need to acquire the insights and skills for turning disagreement and disputes into opportunities for cooperation. This course will provide those insights, and participants will receive a free copy of the instructor's best-selling book, The Game of Life: Turning Conflict into Cooperation

Who Should Attend
Anyone who must deal with conflict (from trivial disagreements to visceral, hostile disputes) or wrestle with insensitive or frustrating "difficult people" and emotional blackmailers on a regular basis.

Content
In the course, you will learn about

- developing conflict consciousness: strategic choices; causes and barriers; dimensions and functions; assessing your normal conflict management style; essential distinctions
- the psychology of conflict: the law of conflict; perceptual barriers; interaction cycles; mechanisms of self-control; conflict escalation and resolution; critical principles
- intelligent confrontation: dealing with disagreement; changing unintentional and problem behaviours; delivering criticism that others can actually take to heart
- influencing difficult people: understanding pathological behaviour; strategies for dealing with bullies, know-it-alls, indecisives, pessimists, silent-unresponsives and others
- prevention tactics: achieving rapport by design; building trust; alignment; dealing with objections; saying "no" without being disagreeable; choosing your battles; hot and cool buttons

Seminar Leader
Dr. Jim Murray

Mar 14	9am-5pm	Four Seasons, Vancouver	[M83060A_VA]
Fee $475	PD Passport Valid	1 Passport Day	7 CPD Hours

Practical Financial Negotiation Tips

LEVEL Introductory

Prerequisite
None.

Overview
This half day seminar covers many useful financial negotiation tips, illustrated by real-life examples that will get you thinking. Participants will work through mini-cases, to apply principles and increase their financial and business creativity, and help their organization to be financially successful in negotiations. They can also bring current work negotiation situations to class to brain storm on them. This seminar is different from and complements tactical/strategic negotiation seminars, by being more financial-oriented, with lots of specific examples. It is partly about how to persuade, but more about creating different financial options that would be attractive to other party.

Who Should Attend
Anybody involved directly or indirectly in or advising with respect to financial negotiations. Because of the wide range of topic coverage, most accountants would benefit from this seminar, unless they are pure specialists, i.e. forensic, tax, IT, bankruptcy, valuations or audit. It is aimed at accountants in leadership positions, such as Controllers, CFOs and directors of finance, as well as those in public practice or consulting, who advise clients. Accountants from large companies, government and not-for-profits also find the course useful. It is also helpful for analysts and accountants moving toward these roles.

Content
- general financial negotiation tips
- complex sales deals with multiple elements
- working the numbers to your advantage
- financing negotiations
- finding new angles and dimensions to negotiate
- sharing success with the other party
- purchasing negotiations - service and goods
- examples in various industries and contexts
- key watch outs and lessons learned
- some unusual tactics that you can use
- ethics in negotiations
- bureaucracy – don't take no for an answer

Seminar Leader
Stephen Priddle, CPA, CA, CMA

Nov 09	9am-12:30pm	Sutton Place, Vancouver	[M82009A_VA]
Fee $225	PD Passport Valid	1/2 Passport Day	3.5 CPD Hours

Sharpening Your Business Writing Skills

LEVEL General

Prerequisite

None

Overview

Good writing skills are essential for business success today; are yours holding you back? This course will dramatically improve your writing skills by showing you how to communicate faster and more effectively using plain English. You'll gain valuable insights into your writing style and the rules of grammar, punctuation, and usage.

Who Should Attend

Individuals wishing to improve their business basic writing skills, or sharpen their advanced skills.

Content

In this session you will learn

- what constitutes good business writing, and how writing style issues affect your message
- why so many good writers are striving for simple English
- how to use the fog index, which measures the minimum grade-school reading level required to read your writing easily
- how reading for work differs from reading for pleasure
- ways to define your purpose and objectives in writing
- to identify what you need to know about your audience
- how to prepare a detailed outline that you can use as a road map
- about writing simple, concise sentences
- the power of verbs and in choosing short powerful words
- organizing information appropriately
- the role of rewriting and editing in honing your message
- the reviewing of rules of grammar, punctuation, and usage

Comments from Past Attendees

"Most informative and enjoyable seminar." "Right mixture of lecture and hands-on practice. Very enjoyable course." "The materials presented were great and the exercises were helpful in teaching important points." "Great technical and practical information which can be applied to a business environment."

Seminar Leader

Duncan Kent, BA, MA

Nov 08	9am-5pm	Hyatt Regency, Vancouver	[M83160B_VA]
Feb 26	9am-5pm	Sutton Place, Vancouver	[M83160C_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

The Art of Negotiating...with anyone

(formerly The Art of Negotiating...with anyone Parts 1 & 2)

LEVEL Intermediate to Advanced

Prerequisite

None

Overview

The one skill you need to succeed is the ability to get other people to agree with you. In any undertaking of significance, whether personal or business related, knowing how to get others to accept your point of view while seeing themselves as winners is crucial to your freedom, happiness and prosperity. Indeed, you will never ascend the corporate ladder without a sound grasp of negotiating principles.

This comprehensive two-day course is the creation of Jim Murray, who has been researching, teaching and practicing this time-honored craft for almost five decades. And he has been regularly teaching this course for us since 1982. He has been publicly regaled as a "negotiator's negotiator", been nationally honoured at the university level for his effectiveness in the classroom, and has authored three best-selling books on negotiating, one of which you will receive as an attendee – *The Optimal Negotiator: A Companion for Serious Deal Makers.*

Who Should Attend

Individuals seeking to accomplish their objectives through the willing (though sometimes unwitting) cooperation of others.

Content

- the framework for winning (every time) – what negotiators really want; getting and protecting information; tactic recognition and response, recognizing and relating to different negotiating styles
- the process simplified: how to prepare, open, identify the critical signals and overcome resistance; how to apply leverage; timing; when to say no; how to increase and decrease power advantages
- human behaviour: how to make people do what you want them to do; engineering a climate conducive to achieving objectives
- essential communication skills: Phrasing to induce perceptions; the language of hidden meanings; non-verbals; lie detection
- strategy and tactics: How to design a winning strategy and change the shape of the deal; the skills of optimal negotiators

Comments from Past Attendees

"Changed my entire perspective on negotiating." "Made the process less intimidating." "This course will pay for itself next week." "Wish I'd taken this 30 years ago." "Savvy insights and real stories told me how to get whatever I want." "Taught me more about negotiating in two days than I learned in three years at law school."

Seminar Leader

Dr. Jim Murray

Mar 12-13	9am-5pm	Four Seasons, Vancouver	[M84040A_VA]
Fee $875	PD Passport Valid	2 Passport Days	14 CPD Hours

Tools for Communicating with Difficult People

LEVEL General

Prerequisite

None.

Overview

This course explores the reasons we find certain individuals and situations difficult to deal with. Is it because a person is emotional, resistant, or behaving badly? What are our reactions to a difficult person or situation, and what are the reasons we react the way we do? Are our reactions productive? What can we do differently to ensure a productive conversation that enables change in a way that is respectful and inclusive?

This course will help you deal with the reactions of others and to self-manage your own. It will provide you with techniques for assertively, respectfully and accurately describing behaviours you find difficult, and for requesting a change. It will help you prepare for, and to conduct, difficult conversations.

Who Should Attend

Anyone who would like to, or needs to, address problematic behaviour inside or outside of the workplace.

Content

- defining and exploring behaviour
- dealing with resistance and minimization
- defusing emotion
- anger arousal and impact on cognitive functioning
- self-management tools
- communication skills
- limit setting and disengaging
- exploring assumptions - intention - effect

Comments from Past Attendees

"Pam is an awesome teacher!" "Instructor was very nice and helpful. She brought positive energy to the class." "A lot of useful information."

Seminar Leader

Pam Penner

Oct 29	9am-5pm	Quality Bayside, Parksville	[M83652B_PA]
Dec 06	9am-5pm	Sutton Place, Vancouver	[M83652C_VA]
Feb 21	9am-5pm	Sheraton Guildford, Surrey	[M83652D_SU]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

Transforming the Way You Sell Yourself

LEVEL Introductory

Prerequisite

None

Overview

The ability to 'sell yourself' is an important part of the return on the investment you've made in your career! The objective of this course is to provide you with the skills to sell your expertise with confidence in order to influence decision-makers, board members, and prospective clients or employers.

At the end of this seminar, the participant should be able to

- share expertise with confidence in a concise and confident manner
- sell solutions, strategies, and new ideas in a persuasive way
- be confident that they can articulate, in person, the qualities in their resume or CV
- manage anxiety which, ultimately, saves time and energy

Who Should Attend

Individuals new to the profession, middle managers, employees who report to a Board, or anyone considering a move to a new company or position.

Content

In this session, you will learn

- how to identify the barriers to sharing ideas, strategy, and solutions
- presence: what it is & how to get it
- to avoid the Brain Dump: in most cases less is more!
- how to identify key messages that your audience wants to hear
- how to incorporate those messages into briefings, resumes, and interviews
- the managing of anxiety
- by practicing the concepts in exercises and group discussion

Comments from Past Attendees

"Excellent. A real transformation was offered if we wanted it." "There wasn't a dull moment during this seminar. Excellent!" "Useful, practical, enlightening." "It delivered down to earth concepts that we could apply to our daily lives."

Seminar Leader

Sharon Edwards

Nov 21	9am-12:30pm	Van Conv Ctr West, Vancouver	[M82210A_VA]
Fee $225	PD Passport Valid	1/2 Passport Day	3.5 CPD Hours

Write to be Read

LEVEL Intermediate

Prerequisite

Proficiency in writing in English is required as grammar is not covered. This course assumes participants engage in writing to accomplish tasks and objectives in their day-to-day work.

Special Note

Although not mandatory, bringing a laptop will allow participants to benefit most from the course as they will be able to practice the writing principles and techniques.

Overview

In this course participants will learn how to improve the readability of their writing. They will learn to write in ways that fit with how reading patterns have changed due to technology's impact. Participants will learn tips and techniques for writing efficiently and effectively.

This is a highly interactive course. It is practical with lots of exercises, group discussions, "Before & After" examples, and engaging activities.

Who Should Attend

Anyone who relies on writing to communicate organizational or business-related information. Those who write documents, reports, proposals and strategic content will benefit from learning efficient writing processes and content structure. Those whose writing is entirely in email will find the writing principles and techniques equally beneficial.

Content

- the impact of technology on reading and writing
- writing for different reading styles
- writing for diverse audiences
- techniques to ensure important content is read
- using appropriate tone for the audience
- techniques for writing in plain language
- layout, formatting and structure that enhance readability
- new rules for paragraphs
- best practices for headings and email subject lines
- different approaches to the writing process
- tips for document review and feedback
- techniques for writing a summary
- effective approaches to email

Seminar Leader

Sharon Habib

Nov 16	9am-5pm	Four Seasons, Vancouver	[M83014B_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

A Coach Approach to Problem Solving

LEVEL Intermediate to Advanced

Prerequisite

None

Overview

Conflict management may not be considered a core competency in many organizations, but it should! Each day we interact with clients, managers, service providers, employees and peers. Our effectiveness is determined by our ability to negotiate and collaborate with others. Problem-solving and managing conflict in this process seems to be an essential ingredient.

So why are some leaders more effective at conflict management than others? They use a Coach Approach! 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. Effective conflict and resolution results require a coaching and mediation approach.

Who Should Attend

Anyone wanting to improve their ability to embrace typical challenges and conflict in the workplace.

Content

In this session, you will learn how to

- design a "problem solving coaching" conversation
- identify the positive opportunities that conflict creates
- address workplace conflict more confidently
- understand a powerful "constructive feedback" model

Comments from Past Attendees

"Great energy, passion and enthusiasm." "Great instructor. Engaging, high energy, relevant topics." "Hands-on coaching topics. Not just another leadership course, but actual coaching."

Seminar Leader

Lesley-Ann Marriott, CEC, PCC

Nov 28	9am-5pm	Ramada Hotel, Kelowna	[M83600B_KE]
Dec 05	9am-5pm	Marriott Inner Harbour, Victoria	[M83600C_VI]
Feb 15	9am-5pm	Sutton Place, Vancouver	[M83600D_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

Project Management: Tips & Traps

LEVEL Intermediate

Prerequisite

None

Overview

The objective of this seminar is to organize a project for success in a realistic and effective manner.

Participants will gain the skills and knowledge to

- understand the value of project management for your organization
- organize projects effectively
- identify practical problems confronting a project
- learn PM best practices and what works for you

Who Should Attend

Senior managers seeking a greater understanding of project management, identifying improvement.

Content

Project Management (PM) is fundamental to an organization's success; essentially, it is the organization of resources to meet time-specific outcomes. We will provide an overview of PM, explain why a company should use it, and describe who should use it. Then we will run through the necessary steps to implement a project management approach. We will address the components of a good plan: how to organize for success; identifying potential barriers; and, studying PM best practices and how to use them. In the wrap-up, we will include some advice on practical problems associated with PM.

Comments from Past Attendees

"Great course. Enjoyed every second of it. Great discussions and real life examples. Extremely interesting." "Practical information on project management." "Great teaching and communication ability." "Good overview of subject."

Seminar Leader

Bruce Acton, FCMC, MBA

Nov 19	**9am-5pm**	**Van Conv Ctr West, Vancouver**	**[M83460B_VA]**
Fee $450	**PD Passport Valid**	**1 Passport Day**	**7 CPD Hours**

Thinking Beyond the Box

LEVEL Intermediate to Advanced

Prerequisite

None

Overview

Thinking differently and more effectively is the key to success in everything you do, whether discovering hidden possibilities, dealing with risk, conceiving novel concepts or solving complicated problems. Creative thinking is neither a gift nor a consequence of magical inspiration; it's a learnable skill. Unfortunately, it's a skill you never acquired in school – you might have been taught how to learn but you were not taught how to think.

Each of us has a mental model of how we think the world works – it determines what we pay attention to and how we solve problems. If our model is rigid, if we only think on one cylinder, we make decisions in the same way with the same results. If, on the other hand, you've built a toolbox of approaches for filtering your experiences and choose the best tool for the job, you become far more effective as a decision maker. To achieve this proficiency, you must cross train your brain to make it more flexible and adaptable. Smart leaders have the biggest toolboxes and don't rely on antiquated problem solving techniques.

Who Should Attend

We work in an age that demands smart leaders – those who "make things happen" rather than hope they might happen. Accountants, in particular, tend to peer into the future through the lens of rational thought. Yet the future can't be forecasted through spreadsheets or projecting what we already know. Analytical thinking – the search for one right answer – is no longer sufficient, much less adequate. This two-day course may change your life. We all have the potential to think differently, provided we first rid ourselves of the blind spots that prevent us from achieving our full potential.

Content

- principles for thinking differently: Getting beyond small-cage habits and cognitive biases; How our brains work (and don't)
- overcoming the barriers that prevent us from solving problems: The power of intuitive thought and how to harness it
- essential principles: How to sell your ideas; Individual and group techniques for liberating ideas; Applying the tools at work
- personal liberation and transformation: Will your brain keep up?

Comments from Past Attendees

"Forced me to understand who I am." "A framework for solving tough problems when I hit the wall." "A humbling experience." "Provided the fuel to re-direct my self-confidence in a more productive manner."

Seminar Leader

Dr. Jim Murray

Nov 13-14	**9am-5pm**	**Van Conv Ctr East, Vancouver**	**[M84980A_VA]**
Fee $875	**PD Passport Valid**	**2 Passport Days**	**14 CPD Hours**

TITLE STATUS

NEW

Becoming an Ethical Leader

LEVEL Introductory

Prerequisite

None.

Overview

This workshop will give participants insight into becoming ethical leaders, and how that translates into becoming more effective and respected leaders. It will explore the critical role ethical leadership plays in creating the ethical climate in organizations. This seminar will first identify the toxic side of leadership. By illuminating unethical leadership traits, we are more able to correct those behaviours and promote ethical leadership. It will then focus on the positive aspects of ethical leadership, and how to make and follow through on ethical leadership decisions. We will discuss elements of character and how they influence ethical decision making. Topics covered during the session will be reinforced through interactive group discussions that are based on real life challenges facing the ethical leader.

By the end of this seminar, participants should be able to

- understand unethical leadership practices
- become aware of negative motivators
- improve moral decision making
- acquire ethical knowledge
- resist situational pressures
- understand the role of reason and emotion in ethical decision making
- make better ethical decisions as a leader

Who Should Attend

Those new to leadership or looking to improve the ethical climate in their organization. Owners of companies and executive management will also find value in having their management teams attend.

Content

- unethical leadership practices
- common drivers of unethical behaviour
- moral imagination and moral disengagement
- assessing ethical awareness
- moral decision making
- resisting negative situational pressures
- make and follow through on ethical leadership decisions
- elements of character and how they influence ethical decision making
- systematic approach to ethical leadership

Ethics Content

This seminar contains 4 hours of ethics content.

Seminar Leader

Morgan Hamel, MA

Oct 26	8:30am-12:30pm	Four Seasons, Vancouver	[E82052A_VA]
Oct 26	1pm-5pm	Four Seasons, Vancouver	[E82052B_VA]
Nov 08	8:30am-12:30pm	Civic Hotel, Surrey	[E82052C_SU]
Nov 08	1pm-5pm	Civic Hotel, Surrey	[E82052D_SU]
Feb 13	8:30am-12:30pm	Sutton Place, Vancouver	[E82052E_VA]
Feb 13	1pm-5pm	Sutton Place, Vancouver	[E82052F_VA]
Fee $225	PD Passport Valid	1/2 Passport Day	4 CPD Hours

Business Ethics: It Starts With You

LEVEL Introductory

Prerequisite

None.

Overview

This course offers an introduction to understanding and managing ethical issues in a business setting. Through case work and open dialogue, it explores the intersection amongst prominent theoretical approaches to ethics, personal values, business values and how they shape business decisions. We consider the rightness and wrongness of human conduct in a business setting based on these approaches. The course will offer a brief historical review and investigate various ethical theories. The goal is to build a foundation for participants to investigate the ethical dimensions of controversial business issues.

Who Should Attend

Individuals and leaders wishing to understand, reflect, and manage ethical issues in a business setting.

Content

- foster an ethical mindset - explore and assess the contextual issues in business ethics and the ability to think critically and ethically within them
- identify your "ethical standard" and how to communicate this standard in support of business decisions - how you manage a series of ethical dilemmas including how you structure ethical issues, use data and develop conclusions
- develop communication strategies in support of ethical actions - examine formal and informal communication tools to effectively communicate ethical ideas
- examine your understanding of key concepts and terms in business ethics - develop an awareness of the impact on ethics and business decision making at all levels of an organization
- reflect on ethical issues in a business context - collectively explore a problem in impact of business ethics in a global context in order to develop a perspective that matches their perceptions and evidence

Ethics Content

This seminar contains 4 hours of ethics content.

Seminar Leader

Dr. Shawn Ireland, PhD

Oct 24	8:30am-12:30pm	Victoria Conf Ctr, Victoria	[E82030G_VI]
Oct 24	1pm-5pm	Victoria Conf Ctr, Victoria	[E82030H_VI]
Oct 31	8:30am-12:30pm	Ramada Hotel, Prince George	[E82030I_PG]
Oct 31	1pm-5pm	Ramada Hotel, Prince George	[E82030J_PG]
Nov 01	8:30am-12:30pm	Sutton Place, Vancouver	[E82030K_VA]
Nov 01	1pm-5pm	Sutton Place, Vancouver	[E82030L_VA]
Nov 14	8:30am-12:30pm	Executive Plaza, Coquitlam	[E82030M_CO]
Nov 14	1pm-5pm	Executive Plaza, Coquitlam	[E82030N_CO]
Dec 12	8:30am-12:30pm	Executive Airport, Richmond	[E82030O_RI]
Dec 12	1pm-5pm	Executive Airport, Richmond	[E82030P_RI]
Feb 20	8:30am-12:30pm	Quality Hotel, Abbotsford	[E82030Q_AB]
Feb 20	1pm-5pm	Quality Hotel, Abbotsford	[E82030R_AB]
Mar 06	8:30am-12:30pm	Executive Hotel, Burnaby	[E82030S_BU]
Mar 06	1pm-5pm	Executive Hotel, Burnaby	[E82030T_BU]
Fee $225	PD Passport Valid	1/2 Passport Day	4 CPD Hours

Code Decoded: Evolving Professional Ethical Expectations

(formerly Ethical Principles and the Accounting Profession)

LEVEL General

Prerequisite
None.

Special Note
Please bring a current copy of the *CPABC Code of Professional Conduct* (hardcopy or electronic) as it will be referred to throughout.

Overview
This course focuses on evaluating current and emerging professional ethical requirements and how they impact decision-making in business while serving employers, clients and the public.

Who Should Attend
The course is designed for CPAs who would like a deeper evaluation of the Code. This course builds on your competence in interpreting and applying the *CPABC Code of Professional Conduct*, and centers on active participation.

Content
The course begins with a refresher of the Code, then examines in depth a few areas of the Code that are relevant in a wide variety of contexts and can pose challenges requiring significant judgment. Collaborative group activities allow you to explore possible actions and outcomes and to recognize linkages between key ethical requirements.

Ethics Content
This seminar contains 4 hours of ethics content.

Seminar Leader to be drawn from
Michael Ell, FCPA, FCGA
Laura Friedrich, FCPA, FCGA
Roger Merkosky, CPA, CA
Mark Ostry, CPA, CGA
John Page, CPA, CA
Wendy Royle, CPA, CA

Oct 19	8:30am-12:30pm	Norther Grand, Fort St John	[E82011A_FS]
Oct 23	8:30am-12:30pm	Coast Capri, Kelowna	[E82011D_KE]
Oct 24	1pm-5pm	Best Western, Terrace	[E82011B_TE]
Oct 25	8:30am-12:30pm	Quality Hotel, Abbotsford	[E82011C_AB]
Nov 05	1:30pm-5pm	Best Western, Courtenay	[E82011E_CR]
Nov 06	8:30am-12:30pm	Quality Bayside, Parksville	[E82011F_PA]
Nov 15	8:30am-12:30pm	UBC Robson, Vancouver	[E82011G_VA]
Nov 16	8:30am-12:30pm	Executive Airport, Richmond	[E82011H_RI]
Nov 21	8:30am-12:30pm	Executive Plaza, Coquitlam	[E82011I_CO]
Nov 21	8:30am-12:30pm	Marriott Inner Harbour, Victoria	[E82011J_VI]
Dec 04	8:30am-12:30pm	Executive Hotel, Burnaby	[E82011K_BU]
Dec 05	8:30am-12:30pm	Sheraton Guildford, Surrey	[E82011L_SU]
Dec 13	8:30am-12:30pm	Van Conv Ctr West, Vancouver	[E82011M_VA]
Jan 29	8:30am-12:30pm	Sutton Place, Vancouver	[E82011N_VA]
Feb 15	8:30am-12:30pm	Sheraton Guildford, Surrey	[E82011O_SU]
Feb 21	8:30am-12:30pm	Marriott Inner Harbour, Victoria	[E82011P_VI]
Fee $225	PD Passport Valid	1/2 Passport Day	4 CPD Hours

TITLE STATUS
NEW

Ethics at our Core

LEVEL Introductory

Prerequisite
None.

Overview
Commitment to ethical conduct and protecting the public are what differentiate CPAs as essential business leaders. Adherence to the *CPA Code of Professional Conduct* is not just a professional obligation, it's a source of pride, value, and competitive distinction. Our stakeholders rely on our judgment and guidance, but ethical dilemmas can be complicated, and determining how to implement the best course of action can be challenging.

This course will provide participants with an opportunity to refresh and update their knowledge of the *CPA Code* and build competence in interpreting and applying the Code to resolve a variety of realistic situations. Participants will also explore the current environment of workplace ethics and assess the implications for ethical leadership. The workshop emphasizes collaboration and interactivity, as participants are engaged with their peers on a variety of activities including quizzes, comparative surveys, and case studies.

Who Should Attend
This course is applicable to CPAs at all levels of their career, and in any type of organization. The course draws on examples and interactive activities across a range of industries and roles that reflect the breadth of the profession. Special care will be taken to balance the contexts of industry, government, not-for-profit, and public practice/public accounting. Sufficient content will be provided such that any given offering can be over-weighted in its focus (through additional examples and/or case studies) to be more reflective of the audience in the room.

Content
- apply research and critical thinking skills to analyze ethical challenges
- identify key ethics trends in the Canadian and global business environments and determine the implications for business leaders
- use the *CPA Code of Professional Conduct* as a resource for decision-making, on par with other professional standards
- interpret and apply the *CPA Code* to resolve ethical issues
- apply professional judgment in determining the most appropriate action, and defend their decisions
- plan ways of enhancing their own organization's ethical culture

Ethics Content
This seminar contains 4 hours of ethics content.

Seminar Leader
Laura Friedrich, FCPA, FCGA

Oct 25	8:30am-12:30pm	Executive Hotel, Burnaby	[E82060A_BU]
Nov 20	8:30am-12:30pm	Sheraton Guildford, Surrey	[E82060B_SU]
Dec 11	8:30am-12:30pm	Van Conv Ctr West, Vancouver	[E82060C_VA]
Fee $225	PD Passport Valid	1/2 Passport Day	4 CPD Hours

Gateway to Membership: Welcome to the Pros

(formerly The Essence of Professionalism: Ethics, Rules and Standards for New CPA, CGAs)

LEVEL General

Prerequisite
Recent completion of the requirements for membership under the CGA legacy program.

Overview
This seminar helps new CPA, CGAs in their transition from student to CPA, CGA member. The session focuses on ensuring that new members understand and accept their responsibilities as CPA, CGAs, while also recognizing the opportunities, resources and support available to them as members of a strong professional community.

Who Should Attend
This course is designed specifically for, and applicable only to, new CPA, CGAs, to fulfill the legacy requirement to complete the full-day ethics course by the end of their first CPD reporting year.

Content
Topics covered will include
- the governance structure and regulatory framework of CPABC
- privileges and obligations of membership including CPD requirements
- protecting the public
- interpreting and applying the CPA Code of Professional Conduct
- volunteerism within the profession
- resources within the professional community, including the roles and functions within CPABC's member services and PD teams

Seminar Leader
Laura Friedrich, FCPA, FCGA

Nov 14	9am-5pm	Four Seasons, Vancouver	[E83101C_VA]
Feb 04	9am-5pm	Sutton Place, Vancouver	[E83101D_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

Professional Presence

LEVEL General

Prerequisite
None

Overview
What makes some of us successful, while others with the same skill level are left behind? Improve your professional presence, enhance your personal profile and as a result, your business relationships. In today's world we need to make a good first impression quickly; through email, voice and face-to-face. This practical, interactive one-day course will provide you with valuable skills to increase your effectiveness and your confidence in any situation.

Who Should Attend
Anyone wanting to build better business relationships.

Content
In this session, you will learn how to
- demonstrate proper business etiquette
- create a dynamic and lasting first impression
- master the "invisible" impression you send through electronic correspondence and voice mail
- use a "personal tagline" to construct a memorable introduction - ensuring the right people don't forget you
- master small talk and networking
- practice social savvy business entertaining
- manage effective non-verbal communication
- display "professional presence" in difficult situations

Comments from Past Attendees
"Rhonda is an excellent facilitator. Her positive, energetic nature makes the experience so much more helpful." "Everything learned in this course can be applied to the workplace as well as everyday life." "Very interactive. Great presenter. Enjoyable day." "Rhonda made the course very comfortable and informative."

Seminar Leader
Rhonda Caldwell

Dec 11	9am-5pm	Van Conv Ctr West, Vancouver	[M83810A_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

Shades of Grey: Ethics in the Workplace

LEVEL Intermediate

Prerequisite

None.

Overview

This course aims to develop and enhance the participants understanding and application of business and professional ethics. Throughout the session, numerous case studies and ethical dilemmas are used to encourage discussion and explore moral philosophy in the workplace.

Who Should Attend

Professional accountants who have decision-making and reporting responsibilities within their organizations.

Content

In this course, you will learn

- the core of ethics, including the professional codes and sources of ethical guidance
- how ethics impacts the culture and environment of an organization
- professional conduct, including independence, objectivity and dealing with conflicts of interest
- ethical decision-making, including exercising professional skepticism and using ethical frameworks to assist in the process
- confidentiality and acts considered discreditable to the profession

Ethics Content

This seminar contains 4 hours of ethics content.

Comments from Past Attendees

"The speaker was engaging with fun case studies." "Kept my interest throughout – presentation method and style were excellent." "A job well done! Really enjoyed this PD course." "Very interesting deliverance of the topic." "Entertaining, relevant, practical."

Seminar Leader

Antoine Bishara, CPA, CA, CFA

Oct 25	8:30am-12:30pm	Van Island Conf Ctr, Nanaimo	[E82051F_NA]
Oct 25	1pm-5pm	Van Island Conf Ctr, Nanaimo	[E82051G_NA]
Oct 25	8:30am-12:30pm	Four Seasons, Vancouver	[E82051H_VA]
Oct 25	1pm-5pm	Four Seasons, Vancouver	[E82051I_VA]
Nov 14	8:30am-12:30pm	Wingate, Kamloops	[E82051J_KA]
Nov 14	1pm-5pm	Wingate, Kamloops	[E82051K_KA]
Nov 29	8:30am-12:30pm	Ramada Hotel, Kelowna	[E82051L_KE]
Nov 29	1pm-5pm	Ramada Hotel, Kelowna	[E82051M_KE]
Feb 20	8:30am-12:30pm	Executive Plaza, Coquitlam	[E82051N_CO]
Feb 20	1pm-5pm	Executive Plaza, Coquitlam	[E82051O_CO]
Feb 21	8:30am-12:30pm	Executive Airport, Richmond	[E82051P_RI]
Feb 21	1pm-5pm	Executive Airport, Richmond	[E82051Q_RI]
Fee $225	PD Passport Valid	1/2 Passport Day	4 CPD Hours

Understanding and Embracing Ethics in the Workplace

LEVEL Intermediate

Prerequisite

None.

Overview

"I believe…. therefore I do…" Research shows that despite our best intentions and conviction to our values, our actions in times of conflict or stress may not be what we expect.

This session provides an opportunity to challenge and uncover what "ethics" means in a professional context and how our goals, values and traits drive our responses in times of conflict and stress. Participants will have opportunities to practically apply what they learn through interaction and knowledge exchange with their peers.

Who Should Attend

CPAs and other business professionals seeking to better understand the challenges of ethics in the workplace and how best to prepare and manage responses to ethical challenges.

Content

In this course, you will learn

- how to manage organizational dynamics when personal ethics conflict with corporate values
- various approaches to ethical thinking
- the impact stress and conflict has on our thoughts and actions how we can best prepare to work in this environment
- the impact of deadline and goals/objectives in driving ethical performance
- ethics from a broad organizational perspective as it relates to Corporate Social Responsibility (CSR)
- to apply and practice specific techniques, tools and strategies based on relevant business based scenarios

Ethics Content

This course contains 4 hours of ethics content.

Seminar Leader

Tammy Towill, FCPA, FCMA

Oct 24	1pm-5pm	Four Seasons, Vancouver	[E82040C_VA]
Nov 21	1pm-5pm	Van Conv Ctr West, Vancouver	[E82040D_VA]
Dec 06	8:30am-12:30pm	Sutton Place, Vancouver	[E82040E_VA]
Feb 07	8:30am-12:30pm	Sutton Place, Vancouver	[E82040F_VA]
Fee $225	PD Passport Valid	1/2 Passport Day	4 CPD Hours

Balancing Your Wheels

LEVEL General

Prerequisite
None.

Special Note
To get the most out of this seminar, please bring your calendar or day-timer with you.

Who Should Attend
Individuals who may feel that their calendar is too full, and getting in the way of living the life they want.

Overview
No matter where your life path leads there will always be bumps in the road. Job interference with personal and family time is a significant source of stress that creates these bumps. Over 48% of Canadians have reported that their stress has increased significantly in the last few years. Learning to navigate through this uneven terrain requires new tools.

In this session, we will explore some of the following questions…
Do you feel that you have the power to overcome this overwhelming challenge? Are you living your life according to your personal priorities? Are you able to tend to your personal relationships? To your personal health and well-being? If not, how is this impacting your life? What are the costs? To you? Your team? And your career?

Who Should Attend
Individuals who may feel that their calendar is too full, and getting in the way of living the life they want.

Content
In this session, you will learn

- how to re-draft your life according to your personal and professional priorities.
- the Four Circles – how the 4 key domains of life intersect and support our lifestyles
- self-assessment, and determine how balanced you currently are
- how to develop a personal 'whole life' vision
- key optimizers that will help you manage your resiliency and energy

Comments from Past Attendees
"The seminar provided us with some great tools and valuable key learnings to apply in our lives." "The course materials were personally focused but also used the benefits of group discussions." "Fantastic."

Seminar Leader
Lesley-Ann Marriott, CEC, PCC

Dec 07	9am-5pm	Sutton Place, Vancouver	[M83017B_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

Becoming...what you really want to be

LEVEL Intermediate

Prerequisite
None

Overview
What kind of life do you want for yourself? If you could, would you change your career trajectory? Do you know what you want to do but aren't quite sure how to do it? Have you discovered your life's purpose, achieved your potential, arrived at the professional plateau to which you aspired? Have you reached a "mid-point" and don't know what the rest of your life will offer? If yes, NOW may be the time to figure it out. If you choose to ignore the questioning voice within, you may be the architect of your own misfortune.

This course is about the rest of your life. Why spend it doing what you don't enjoy or what doesn't nourish you? Is being "a good accountant" the legacy you want at the end of your days? If, despite your talents and desires, you haven't arrived where you want to be, are at a crossroads, or just want to get off the treadmill, this life-altering course was designed specifically for you. It demonstrates the principles and practicalities of becoming extraordinary. Attendees receive a copy of Dr. Murray's latest book *Becoming … what you really want to be: Essays on meaning, identity and destiny*.

Who Should Attend
Individuals looking for a roadmap for changing their lives … and those who genuinely believe they can.

Content
In this session, you will learn

- why most of us fail to achieve our full potential in life
- taking stock of what it will take: realistic self-assessment
- the essential ingredients for achieving whatever you want
- how to map the best route to your desired destination
- aligning your priorities (to do's) with time and effort
- articulating your compass: the non-negotiable rules
- connecting with key influencers and getting good advice
- self-promotion: how to impress, sell and build your brand
- surviving the dip: moving from average to exceptional
- willpower: finding and strengthening the drive to succeed
- living a life of purpose: the choices you need to make

CommentS from Past Attendees
"Lots of think about … glad to have taken the course." "Very informative; gained new insight; thought provoking." "Inspirational." "Excellent presenter – walks the talk." "A compelling call to action." "Big ideas that encourage us to grow no matter where we find ourselves."

Seminar Leader
Dr. Jim Murray

Nov 15	9am-5pm	Van Conv Ctr East, Vancouver	[M83110A_VA]
Fee $475	PD Passport Valid	1 Passport Day	7 CPD Hours

Brain Focus: The Power of Full Engagement

LEVEL General

Prerequisite

None

Overview

The way we're working isn't working. The success you achieve in life depends on the knowledge you possess. But today, with vast amounts of information pouring in every minute from hundreds of sources, acquiring the knowledge you need has become a major challenge. This course gives you clear and practical ideas to help you learn anything better, easier, faster, and will help you master the skills of absorbing, retaining and using knowledge more effectively.

This course is packed with tips, stories, ideas, and strategies, to help your brain and information management skills.

Who Should Attend

Anyone who wants to improve productivity, regain focus, and work smarter all day long.

Content

In this session, you will learn how to

- overcome limiting beliefs that block your ability to learn and to succeed
- set up a 'brain friendly' environment that supports learning and work
- reduce stress from information overload
- read faster and remember more
- think more creatively
- eat with your brain in mind
- learn the #1 skill that experts agree is the most crucial to your success

Comments from Past Attendees

"The speaker was very entertaining while being equally informative." "This speaker was fantastic! He knew what he was talking about and definitely had an impact."

Seminar Leader

Terry Small, B.Ed., MA

Feb 08	9am-12:30pm	Sutton Place, Vancouver	[M82190C_VA]
Fee $225	PD Passport Valid	1/2 Passport Day	3.5 CPD Hours

Coach Yourself First

LEVEL General

Prerequisite

None

Overview

Why is it that some managers and leaders inspire people to be the best they can be and others don't? What do they possess that fosters inspiration for people to become valuable assets in their organizations? The answer is simple – they coach from a position of authenticity and personal connection. In this course, you will gain a deeper understanding of your personal coaching style and its impact on others. You will discover the power of personal passion, engagement and purpose to manage yourself, and coach others to be effective coaches, in your organization.

Who Should Attend

Managers and leaders wishing to strengthen their personal coaching skills, self-awareness, and effectiveness in connecting wholeheartedly and authentically.

Content

In this session, you will learn how to

- identify your personal coaching strengths, values, preferences, and ways of working
- assess your coaching identity
- develop a clear personal vision and goals for coaching
- use emotional intelligence theory, the theory of emotional regulation, and their applications
- analyze your own reactions, judgments, emotions, and thought processes that support and hinder authenticity in coaching

Self-assessments, exercises, and skills practice, will be used to develop a better understanding of yourself and the challenges of authenticity as a coach.

Comments from Past Attendees

"Good speaker, interesting and fun, useful information." "It was phenomenal and will be of tremendous value to me both personally and professionally." "The facilitator was perfect – totally knew the material and was able to present it very well."

Seminar Leader

Dr. Shawn Ireland, PhD

Nov 06	9am-5pm	Sutton Place, Vancouver	[M83243B_VA]
Nov 28	9am-5pm	Sheraton Guildford, Surrey	[M83243C_SU]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

Critical Thinking and Self Reflection

LEVEL Intermediate

Prerequisite
None

Overview
Successful leaders and managers have one thing in common – they learn by doing and by applying their experience to day-to-day activities. At the core of their learning style is a continuous examination of the taken-for-granted assumptions that form their approach to decision-making and relationships. This one-day course identifies the link between learning styles, critical thinking and self-reflection in our working and personal lives and how to use these to enhance personal effectiveness.

Who Should Attend
Leaders and managers who want to develop their critical thinking skills to enhance their personal effectiveness.

Content
In this session, you will
- examine the stages in the transformation process in adult development
- explore the "Window on Yourself" - values, beliefs, perceptions
- identify and diagnose your learning style, and your own ways of thinking and working
- get introduced to critical thinking tools and techniques
- about self-motivation and keeping a positive bias
- to challenge assumptions through critical self-reflection
- identify of thinking styles and their role in critical thinking
- action plan, including the use of interpersonal and self-assessment tools to reintegrate new perspectives

Comments from Past Attendees
"Extraordinarily excellent." "Very good seminar leader. Keeps you entertained and provides relevant examples which make this very complex material easier to grasp." "Was very good in keeping my attention with examples, stories, activities, and discussions."

Seminar Leader
Dr. Shawn Ireland, PhD

Nov 07	9am-5pm	Ramada Hotel, Kelowna	[M83860C_KE]
Nov 15	9am-5pm	Four Seasons, Vancouver	[M83860D_VA]
Nov 29	9am-5pm	Sheraton Guildford, Surrey	[M83860E_SU]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

Influence and Assertiveness

LEVEL Intermediate

Prerequisite
None

Overview
Well-developed influencing skills and assertiveness are key competencies for managers in their day to day activities. This highly interactive course provides tools and techniques for enhancing the impact of power and influence and assertiveness with decision-makers and peers.

Who Should Attend
Individuals wishing to increase their influence and assertiveness, improve relationship building, and increase their impact within their organization.

Content
In this session, you will learn
- three methods of influence
- sources of power and influence
- phases of influence
- how to conduct a quick influence test
- the bases of influence and conditions of their use
- to establish and use credibility, reciprocity and persuasion in different situations
- what is assertive, aggressive and passive behaviour
- assertive communication
- a "Bill of Assertive Rights"
- what is assertiveness inventory
- the assertive invitation and techniques
- personal influence auditing – what are your own power and influence preferences
- action planning for the future

Comments from Past Attendees
"The tools introduced will be useful for reference and were clearly presented." "I enjoyed the balance of concepts and exercises." "The discussions were interesting and the exercises were very helpful." "A very good instructor.

Seminar Leader
Dr. Shawn Ireland, PhD

Feb 06	9am-5pm	Sutton Place, Vancouver	[M83930D_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

Personal Effectiveness: Self Awareness and Balanced Thinking

LEVEL General

Prerequisite
None

Overview
Successful people have one thing in common – they learn by doing and by applying their experience to day to day activities. Through understanding themselves, their values and motivators, and by continuously examining their taken-for-granted assumptions, they are able to adapt and improve their communication and management styles, their approach to decision-making and relationships. 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.

Who Should Attend
Individuals wishing to enhance personal awareness to enhance their personal effectiveness.

Content
In this session, you will learn
- about self-understanding and personal growth: the "Window on Ourselves", including assessing our preferred ways of thinking and working
- self-motivation, self-image and self-appraisal
- to challenge assumptions through critical self-reflection
- communication and management styles
- how to link your thinking and emotions to develop your own emotional intelligence
- to foster appreciative inquiry
- to capture knowledge and be introduced to "deep smarts" techniques
- to action plan with the use of interpersonal and self-assessment tools to implement fresh perspectives

Comments from Past Attendees
"This was a productive day and the content worthwhile." "The group discussions were really good. The instructor did a great job of facilitating the group's conversation." "Excellent instructor."

Seminar Leader
Dr. Shawn Ireland, PhD

Dec 11	9am-5pm	Van Conv Ctr West, Vancouver	[M83000B_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

Time Management: The Essentials of Productivity Skills

LEVEL General

Prerequisite
None

Overview
The "time management" challenges of the 21st Century workplace are very different - old solutions don't work anymore! This leading edge course will provide you a new mind-set and skill-set that will optimize your personal productivity learning to produce greater results in less time. Participants will learn how to gain and keep control of competing priorities, concurrent projects and critical deadlines. The focus on practicality means that people walk out with techniques they can apply the next day.

Who Should Attend
Individuals who feel time-challenged, or feel that they don't have enough time in their days.

Content
In this session, you will learn
- the 4 vital productivity principles that top performing executives understand and apply every day
- how to implement workload reduction strategies by identifying and cutting time wasting activities
- the truth about "wasting time"… and how to minimize it
- to stay on track - limit other people taking control of your day
- to create "to-do lists" that really work, overcoming frustration
- to set and manage multiple and constantly shifting priorities
- 3 critical organizational tools essential to create a highly efficient workspace
- multi-tasking - when is it OK or counter-productive
- 4 core components of creating an airtight system
- 12 proven techniques for minimizing interruptions
- how to say NO without feeling guilty
- how to attempt to tame the monster - tips and techniques
- 8 essential techniques to overcome procrastination
- strategies and tactics for creating productive meetings

Comments from Past Attendees
"Very effective presenter – fast paced. Took away lots of practical info." "Great presentation style, enthusiastic, knowledgeable and engaged." "Practical tips. Very thought provoking."

Seminar Leader
Greg Campeau, B.Comm.

Dec 06	9am-5pm	Hyatt Regency, Vancouver	[M83330C_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

Triple Your Reading Speed

LEVEL General

Prerequisite
None

Overview
Do you have enough time to read? Are you tired of feeling info-whelmed? Too many emails? Have you ever finished a page and asked yourself, "What did I just read?" Chances are, you are reading far below your capabilities. Using the latest discoveries about the brain and learning, Terry has trained over 230,000 people to boost their reading power, and move ahead at school or on the job! In addition, vocabulary enrichment will be stressed. Whether you are a student, business person, or a recreational reader... you can quickly, easily, and dramatically improve speed and comprehension!

Who Should Attend
Individuals wishing to start reading faster today, including those who consider themselves to be a hopelessly 'slow reader'.

Content
In this session, you will learn

- how to get the most powerful reading tool ever invented
- to quickly increase your reading speed
- the #1 secret of comprehension (it's not what you think)
- how to save a lot of time
- memory enhancing techniques
- the real reason reading is so good for your brain
- to improve your vocabulary
- motivational tips, plus advice on goal-setting and time management
- your decisions on what to read, and what not to read
- how to understand confusing, or poorly written material

Comments from Past Attendees
"One of the best seminars I have attended. Great content and instructor."
"Really enjoyed it and very useful to me personally and professionally."
"The presenter was simply exceptional and his material and the way he shared his knowledge on the subject was superb."

Seminar Leader
Terry Small, B.Ed., MA

Dec 10	9am-5pm	Van Conv Ctr West, Vancouver	[M83004C_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

Becoming a High Performance Team Member

LEVEL Introductory to Intermediate

Prerequisite
None

Overview
This course is designed to provide a high degree of awareness about what it takes to play a constructive role as a member of a high-performing team. Special emphasis will be placed on interpersonal skills that team members need, for example, advocacy, listening, and conflict resolution.

This course is based on Patrick Lencioni's 5-step framework that includes the practices of building trust, resolving conflict, developing commitment, holding team members accountable, and achieving results. Other aspects such as the stages of team development, and participation in team meetings are also explored.

Who Should Attend
Anyone seeking to take their own teamwork skills to the next level.

Content
In this session, you will learn

- the five dysfunctions of a team
- how to adapt to social styles, including how to adapt your own style when participating in teams
- the art of building trust
- active listening
- conflict resolution and the positive role of team conflict
- how to help hold teammates accountable
- meeting participation
- the role that managers need to play in team development

Self-awareness and skills development will be focused on through an interactive business simulation that will expose typical challenges faced by teams.

Seminar Leader
Tyler Wier

Feb 20	9am-5pm	Sutton Place, Vancouver	[M83213B_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

TITLE STATUS

NEW

NEW

Coaching for CPAs: Essential Skills to Improve Performance and Workplace Culture

LEVEL Intermediate

Prerequisite

None.

Overview

While technology is rapidly being used for ever more tasks in accounting and in most other professions, human skills sets are increasingly valued and sought after in every type of industry. Effective soft skills, such as empathy, conversational intelligence, coaching and leadership skills are imperatives for upwardly driven careers in present and future businesses and organizations. These skills will not only generate greater access to your resourcefulness and untapped potential; they also enable you to "raise the bar" while helping others to reach new levels of achievements. Moreover, you will better succeed in making an invaluable contribution by positively influencing your workplace culture.

Who Should Attend

Accountants aspiring to become leaders who want to mentor selected junior colleagues or other employees, or those who want to improve their performance while also positively influencing the culture at work.

Content

- foundations and principles of coaching and why it creates remarkable results
- coaching vs. managing mindsets; understanding and applying the difference
- coaching dialogues: powerful questions that draw out best solutions and augment motivation
- signature presence: harmonizing your character strengths and personality for impact.
- conversational intelligence: understanding the 3 levels of conversations in daily work lives.
- the 5 languages of appreciation: how to give effective appreciation at work
- mastering advanced listening skills and why they matter in career advancement.
- the feedback loop: providing feedback in an effective, positive and focused manner
- knowing how to guide meetings for better focus, intentions, expediency and results
- neuroscience at work and managing energy rather than time, for peak performance

Seminar Leader

Isabelle St-Jean

Nov 19	9am-5pm	Van Conv Ctr West, Vancouver	[M83038A_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

Coaching for Executive Excellence

LEVEL Advanced

Prerequisite

A few years of managerial and/or supervisory experience will be beneficial

Overview

Great leaders build confident, self-sufficient teams. Does your team get your best? Are they challenged, inspired, and supported by your leadership style? A core competency of leadership is coaching. In fact, modern coaching is becoming the management style of choice. Why? Coaching has the power to sustain change over the long term. Learning coaching techniques will help you empower your team to extend beyond their own capacity.

At the end of this course the participant should be able to

- differentiate coaching from common management strategies
- create great coaching relationships
- use coaching techniques for business oriented goals
- coach by identifying opportunities for employee development
- deliver 3rd party feedback
- criticize people so these people will THANK you
- experience both sides of coaching

Who Should Attend

Senior managers and leaders, and accounting and business professionals wishing to enhance their effectiveness in coaching peers and direct reports.

Content

In this seminar, you will learn

- the theory behind effective coaching techniques with live coaching demonstrations
- how to build coaching relationships and how to apply coaching in everyday management situations
- two powerful coaching models
  - four-part coaching model used by professional coaches
  - Transformational Coaching Model™ designed specifically for coaching in the workplace
- various coaching techniques help people make sustainable changes
- through hands-on coaching by participants with REAL-LIVE feedback from a team of credentialed coaches
- the Great Questions™ coaching game – participants engage in their own coaching scenarios

Comments from Past Attendees

"Lesley-Ann was an excellent presenter and this seminar was so relevant to work place and personal life, so helpful and very positive and informative."

"The information and practical application enable participants to easily apply the learning back in the workplace."

Seminar Leader

Lesley-Ann Marriott, CEC, PCC

Nov 16	9am-5pm	Four Seasons, Vancouver	[M83022B_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

AVAILABLE OPTION
WEB SESSION

Dispelling the Myth of "Effective Meetings"

LEVEL General

Prerequisite

None.

Overview

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.

Who Should Attend

Anyone who has been frustrated in an ineffective meeting or has frustrated others by running an ineffective meeting.

Content

In this seminar, participants will

- weigh in on just how big an issue this really is
- explore value and benefit of contribution to meetings while challenging the structure of how these meetings are undertaken
- challenge what being inclusive looks like
- look at best practices and recent research on new innovative ideas
- consider the impacts of how individual communication styles and organizational culture drive the way organizations use meetings
- discuss how technology is both a tremendous opportunity and a unique challenge

Seminar Leader

Tammy Towill, FCPA, FCMA

Dec 05	9am-12:30pm	Sutton Place, Vancouver	[M82325A_VA]
Fee $225	PD Passport Valid	1/2 Passport Day	3.5 CPD Hours

Effective & Essential Management Skills

LEVEL General

Prerequisite

Managerial and/or supervisory experience is beneficial.

Overview

The objective of this fast-paced, interactive (no role plays) and highly practical learning experience is to enhance your tactical managerial and coaching skills.

Participants will learn how to drive high degrees of engagement, and how to delegate, empower, and provide meaningful feedback to their people.

Who Should Attend

Managers who want to learn how to bring out the best in their people while optimizing their performance.

Content

Creating a culture of engagement and teamwork

- what engagement really means
- how to measure engagement
- factors that build and erode engagement
- understanding group dynamics; develop team synergy
- the 11 characteristics and four core elements of high performance teams
- developing clear performance expectations for the team
- the most common team pitfalls and how to avoid them
- the seven roles of a highly effective team leader

Delegation and empowerment

- the principles of effective delegation
- what empowerment really means and why it is so important
- the complete 7 step delegation process
- the risks and restrictions of empowering people
- how much freedom and latitude to give an employee
- create clear "outcome-based" performance expectations
- determine what performance feedback is appropriate
- facilitate problem solving process to prevent reverse delegation

Seminar Leader

Greg Campeau, B.Comm

Nov 26	9am-5pm	Victoria Conf Ctr, Victoria	[M83360C_VI]
Dec 13	9am-5pm	Van Conv Ctr West, Vancouver	[M83360D_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

Embracing Cultural Relationships in the Workplace

LEVEL Introductory to Intermediate

Prerequisite

None

Overview

As the global economy grows and baby boomers retire, skilled immigrants have emerged as a solution to the ever-increasing talent gap. Workplaces are becoming increasingly diverse with a demographic shift from our current dominant culture, to one where the visible minority will be white. With this comes a new challenge. Our newcomers have great technical skills however, they are challenged by the lack of 'cultural orientation' skills needed to understand the teamwork and leadership characteristics necessary to navigate the Canadian culture.

Being puzzled by the behaviour of individuals of a different culture than your own is something that happens to all of us. Using the GLOBE study, this session will help you better understand the underlying elements of people's behaviour, regardless of their culture of origin. If you've ever wondered why: "She doesn't speak up enough in meetings", "I was told everything was OK and found out later there were some real problems, why didn't he just tell me?", or "Why didn't he tell me there was an important family situation, I feel awful for keeping him late!", this session could be for you.

Who Should Attend

Individuals and leaders working in culturally diverse environments wishing to enhance their effectiveness in cross-cultural leadership, teamwork, and building collegial relationships.

Content

In this session, you will learn

- how to identify global cultural orientations for many newcomers, how these may be opposite ours, and what to do about it
- to better understand yourself in the context of their unseen cultural orientations and how these perceptions can get in the way
- how to assist newcomers in understanding the organization's values and expectations
- how to help identify 'soft skills' gaps in employees, and how to develop their people to help close these gaps
- onboarding techniques for faster new employee integration

Comments from Past Attendees

"Great topic, very timely & very much needed as we try to run businesses with an ever changing demographic and customer base." "High energy and engaging." "Interactive discussion woven into the presentation." "It was applicable to more than one type of workforce."

Seminar Leader

Lesley-Ann Marriott, CEC, PCC

Dec 06	1:30pm-5pm	Sutton Place, Vancouver	[M82216A_VA]
Fee $225	PD Passport Valid	1/2 Passport Day	3.5 CPD Hours

Empowering and Engaging Others

LEVEL Intermediate

Prerequisite

None

Overview

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.

Who Should Attend

Leaders and managers who want the tools and confidence to become more effective in their positions.

Content

In this session, you will learn

- the challenges and benefits of delivering superior performance
- styles of management and leadership and their impact on working relationships
- how to empower and engage employees through a coaching style of management and leadership
- the qualities and skills of an effective manager: values, beliefs, assumptions, biases; building rapport and trust; effective listening and questioning; critical thinking; feedback
- tools and techniques to support engagement in diverse situations
- effective action planning

Comments from Past Attendees

"Very applicable both in workplace and home." "Excellent session and presenter." "Enjoyable and informative."

Seminar Leader

Dr. Shawn Ireland, PhD

Oct 23	9am-5pm	Victoria Conf Ctr, Victoria	[M83640A_VI]
Nov 08	9am-5pm	Ramada Hotel, Kelowna	[M83640B_KE]
Dec 13	9am-5pm	Van Conv Ctr West, Vancouver	[M83640C_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

TITLE STATUS

NEW

Essence of Leadership

LEVEL Introductory to Intermediate

Prerequisite

None.

Special Note

All participants will complete the Universal Model of Leadership™ Self-Assessment and receive a copy of the book, Mastering Leadership: An Integrated Framework for Breakthrough Performance and Extraordinary Business Results.

Overview

What type of leadership matters? There is an overwhelming amount of theories and research on this topic, but given that it is completely unintegrated, it is easy to get lost in the vast sea of solutions. The fact remains: unless we define the type of leadership that matters in our organizations, we are stuck in neutral – we are standing still and yet all around us things are speeding up. The need for effective leadership continues to intensify as complexity escalates and disruption accelerates. It is imperative that leaders grow and develop to meet the complex realities of today's business environment.

This workshop creates the time and space to specifically define and understand the type of leadership that matters. We focus on the Universal Model of Leadership™ which is used by some of the world's most iconic brands to take on the complex task of developing leaders for the future. This powerful psychometric instrument integrates 50 years of leadership theory and research, meaning that you are getting the best leadership thinking available today.

Who Should Attend

Anyone with an appetite for deep and specific exploration of leadership, committed to find their own growth edge and who wants to create a breakthrough in performance.

Content

- the nature of work today, and how to meet the challenge
- the four Universal Promises of Leadership
- research that connects the Universal Model, leadership effectiveness and business performance
- the "Inner and Outer Games" of Leadership through the lens of neuroscience
- assessment results – using the Universal Model of Leadership™, how to target your area(s) for development that promise you the greatest pay-off

Seminar Leader

Alex Wray

Feb 25	9am-5pm	Sutton Place, Vancouver	[M83002A_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

How to Achieve Your Company Vision Through Effective Performance Review

LEVEL Intermediate

Prerequisite

None

Overview

Performance appraisals serve many vital functions in an organization, but are not an end in themselves. Used to its maximum benefit, the performance appraisal is the means by which everyone in the organization understands, and is held accountable for, meeting a truly important objective – accomplishing the corporate vision. Many formal appraisal systems, if an organization even has one, provide little or no link to the corporate vision of the company. This course will show you how you can take your performance appraisal form in one hand, your company vision in the other, and tightly link the two together to achieve your corporate strategy.

Who Should Attend

Leaders at any level who have responsibility for managing the performance of others.

Content

In the session, you will learn

- the 6 important questions to ask when determining your Mission and Vision
- how companies like Amazon, Zappos, Starbucks and Nordstrom use core values to manage performance
- how to create a simple, clear job description by focusing on key outcomes for the role
- how to embed your organizations' strategic priorities into your performance management system
- specific tools that you can add to your management tool-box
- a vital and vigorous four-phase Performance Management System that links the individual's performance with the organization's vision
- how to help employees design weekly action priorities aligned with your organization's vision, mission, and values
- team survey to "temperature-check" your employee's connection to your current corporate vision
- examples of exceptional visions and core values – a template for your organization

Comments from Past Attendees

"Very practical take-aways to implement back in the office."

Seminar Leader

Lesley-Ann Marriott, CEC, PCC

Nov 14	9am-12:30pm	Sutton Place, Vancouver	[M82160A_VA]
Fee $225	PD Passport Valid	1/2 Passport Day	3.5 CPD Hours

Influencing Without Authority

LEVEL Introductory to Intermediate

Prerequisite

None

Overview

The acid test of a good plan is the willingness of others to implement it. 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. An individual's level of influence can be dramatically improved by carefully adjusting ideas to the concerns and communication styles of others, and by formulating ideas in a compelling way. As influencing skills are used more often, resistance to change decreases along with the need to use authority or positional power, leading to stronger relationships and increased commitment.

This course will provide participants with the knowledge, skills, and processes required to influence others in getting things done.

Who Should Attend

Individuals at any level within organizations, including senior leaders, who are interested in improving their level of influence without relying on positional power.

Content

In this session, you will learn how to

- improve the odds of getting good ideas adopted
- better influence peers and superiors
- reduce resistance to change
- influence with reduced reliance on authority or positional power and increase your credibility with others
- build stronger relationships
- achieve increased commitment to new ideas by appealing to both logic and emotion

Comments from Past Attendees

"One of the best seminars I have attended over the past 18-19 years." "Excellent seminar!" "An outstanding instructor – knowledgeable, personable and engaging." "Nic was fantastic. He really knew the material, engaged the attendees and had a fun vibe to the day."

Seminar Leader

Nic Tsangarakis

Nov 21	9am-5pm	Van Conv Ctr West, Vancouver	[M83253B_VA]
Feb 21	9am-5pm	Hyatt Regency, Vancouver	[M83253C_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

Leadership and Coaching

LEVEL Intermediate

Prerequisite

None

Overview

The climate that leaders create in their working environment is a key factor in the performance of their teams, and ultimately the results of their organization. This course focuses on equipping participants with the knowledge and skills to become effective and respected leaders, able to turn compliance into commitment to achieve the desired results for their business unit, teams and themselves in a more effective manner.

Who Should Attend

Leaders and managers wishing to enhance their leadership skills and achieve improved performance.

Content

In this session, you will learn

- the process of strategic leadership and the leadership triangle
- inspirational leadership
- leadership for change: shared core values
- coaching for growth
- coaching and mentoring for performance improvement – maximizing individual competencies and enabling others to fulfill their potential
- action planning

Comments from Past Attendees

"This was the best course I have attended, the speaker was very knowledgeable and based the day on his experiences as well as the class' desired outcomes." "Very engaging!"

Seminar Leader

Dr. Shawn Ireland, PhD

Oct 30	9am-5pm	Ramada Hotel, Prince George	[M83480C_PG]
Dec 06	9am-5pm	Hyatt Regency, Vancouver	[M83480D_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

Make Change Stick: Getting Results by Changing the Inner Game

LEVEL Introductory to Intermediate

Prerequisite

None. Previous attendance at Essence of Leadership is beneficial but not mandatory.

Overview

After nearly dying from heart problems, Michael Eisner, the former CEO of The Walt Disney Company, vowed to 'let go' of some of his duties. He brought in Michael Ovitz, co-founder of the mighty Creative Artists Agency, as second in command. But Eisner – with his very life on the line – failed to 'let go' and see the idea through. He struggled to do what he publically committed to do. This phenomenon is all too common. Despite knowing what to do, and declaring we want to do it, we fail to do it. Science now reveals the reasons: old habits, a fixed mindset, and our unconscious mind co-conspire to make us immune to change. This workshop provides the opportunity to apply the science-based approach developed at Harvard University credited as having 'cracked the code' on this immunity to change phenomena.

Who Should Attend

Anyone wanting to create a breakthrough in their own performance. High achievers disappointed with conventional training as a means for genuine development and growth. Participants should come prepared to work on an improvement goal and are encouraged to bring any and all documents such as any existing personal assessment reports, corporate learning plans, or performance reviews.

Content

- science about the brain about why we keep doing what we do in life and business, even when we want to stop
- how individual habits along with the collective mindsets in our organizations combine to create a natural, but powerful, immunity to change
- insights from neuroscience and neuroplasticity into what it takes to make change stick
- a step-wise process to diagnose and reveal your own immunity to change
- 3 essential stages to overturn any immune system
- a short-term plan designed to kick start the change you want to make

Seminar Leader

Alex Wray

Dec 10	9am-5pm	Van Conv Ctr West, Vancouver	[M83013A_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

Managing Change and Transformation

LEVEL Intermediate

Prerequisite

None

Overview

We live and work in a continually changing environment, which provides challenges and opportunities for our organizations. This course will focus on understanding and responding to the process of business change and transformation. It will demonstrate how participants can champion change efforts, and manage the change and transformation process through leadership, perseverance, risk-taking, and the enrolment of others.

Who Should Attend

Leaders and managers wishing to better handle change and transformation, and understand how to implement change more successfully.

Content

In this session, you will learn

- what is change
- various forms of individual and organizational change
- how to become a change leader
- how to communicate change and develop strategies for implementation
- how to manage the danger – denial and resistance
- how to manage the opportunity – exploration and commitment
- effective action behavior

Comments from Past Attendees

"Excellent! Engaging, knowledgeable and entertaining instructor." "Instructor does a great job of facilitating/creating conversation and drawing on experiences from people in the room." "Really good day."

Seminar Leader

Dr. Shawn Ireland, PhD

Dec 05	9am-5pm	Sutton Place, Vancouver	[M83800A_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

Managing My People

LEVEL Introductory

Prerequisite

None.

Overview

This interactive course will focus on helping managers get the most out of their people. Increasingly, managers are recognizing that their people provide the only true and sustainable way to differentiate their business offering and serve clients most effectively. The challenge is to maximize the contribution that people make to improve the success of that business. This course will equip managers with effective ways of working with their teams, in order to get the best out of each team member.

Who Should Attend

New and experienced leaders who are seeking to hone their management skills to drive enhanced performance of their teams.

Content

In this session, you will learn

- the characteristics and benefits of effective management – people as our competitive advantage
- the nature and purpose of management interventions
- how to build an effective management style
- how to assess what your team members need from you
- matching your management styles to development levels of staff
- how to inspire and motivate your colleagues
- about giving effective feedback
- the power of authenticity
- how to coach for development and improved capability

Comments from Past Attendees

"High level of group activity and interaction. Made the day a more practical learning experience." "Engaging, and had a good mix of discussion and instruction."

Seminar Leader

Helen Wale, MA, CPHR, CEC

Nov 07	9am-5pm	Sutton Place, Vancouver	[M83034B_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

What Do People Want? Motivating Yourself and Others

LEVEL General

Prerequisite

None.

Overview

An important role of managers in the workplace is to get things done through other people. To do this they need to be able to motivate employees, but that is easier said than done! To understand motivation you must understand human nature itself, and herein lies the problem. This one-day, highly interactive course provides practical tools and techniques for understanding what motivates people and how to develop and maintain a motivated workforce.

Who Should Attend

Managers or leaders wishing to ensure highly motivated teams for top performance outcomes.

Content

In this session, you will learn

- what people really want – exploring motivation
- self motivation and keeping a positive bias
- self appraisal
- motivation theories in practice
- extrinsic and intrinsic motivation
- achievement, power and affiliation
- equitable treatment: motivating versus de-motivating
- job characteristics that encourage staff engagement
- analysis of individual motivation
- motivation across cultures
- to use effective feedback to enhance performance
- how to move beyond productivity

Comments from Past Attendees

"Excellent. Very much enjoyed it." "Very good seminar leader – good listener and understanding of material." "Leader was interesting, informative, and brought a passion to the topic that was very engaging."

Seminar Leader

Dr. Shawn Ireland, PhD

Mar 13	9am-5pm	Sutton Place, Vancouver	[M83240B_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

Wiring Your Brain for High Impact Leadership

LEVEL Introductory to Intermediate

Prerequisite

None

Overview

The brain has everything to do with who we are and what we do, and leadership is all about influencing who we are and what we do. Ninety percent of what we know about the brain has been learned in the last 2 years. Come and hear what Terry Small, a leader in the field of translating brain research into practice, has to say about brain engagement and learning to lead with the brain in mind.

Who Should Attend

Individuals wishing to leverage the latest research on the brain in order to become more effective leaders.

Content

In this session, you will learn

- how you can use the growing body of research on the brain to become a more effective leader
- why the brain resists change that prevents new ideas from being accepted
- how thinking habits influence our actions, especially with problem solving and conflict resolution
- the 5 things that Brain Science says that leaders MUST get right.
- leading from the Mind's Eye
- rewiring your brain for leadership
- leading self and others at the edge
- the science of peak performance
- the science of not being boring
- creating influence through an understanding of the brain
- the incredible importance of being a secure base and building trust
- what the amazing discovery of mirror neurons means for leaders and their teams
- the importance of bonding
- understanding that the person is never the problem

Comments from Past Attendees

"New, relevant information was presented in an easy, understandable way." "5-star seminar! This is a 'must-attend' for any manager/leader." "Interactive, engaging, yet practical."

Seminar Leader

Terry Small, B.Ed., MA

Nov 16	9am-5pm	Coast Capri, Kelowna	[M83023C_KE]
Nov 23	9am-5pm	Van Conv Ctr West, Vancouver	[M83023D_VA]
Dec 05	9am-5pm	Sheraton Guildford, Surrey	[M83023E_SU]
Mar 05	9am-5pm	Sutton Place, Vancouver	[M83023F_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

Did you know ...

Canada-BC Job Grant

Employers in BC can apply for the Canada-BC Job Grant. This cost-sharing program can provide up to two-thirds of the cost of training new and current employees up to a maximum of $10,000 per grant. For details, please go to: www.workbc.ca/canadabcjobgrant

CPABC Tax Courses Accredited by the Law Society of BC

Beginning in 2012, CPABC PD tax seminars are accredited by the Law Society of British Columbia. Practicing BC lawyers can now earn CPD credits by attending tax seminars offered through CPABC PD.

Early Registration & Waitlists

We strongly encourage members to register early. Early registration will not only ensure your space in some of our highly popular seminars, but will also prevent seminars with lower enrolment from being cancelled. The maximum number of participants in a seminar is dependent on the type of presentation and delivery format set by the course author and/or instructor. Although we try to accommodate as many requests as we can, we do not want to compromise the ability of our instructors to teach effectively. If a seminar is already full, you can request to be waitlisted.

Attire at PD Seminars

While there is no official dress code at our seminars, the majority of attendees arrive in business casual attire. As meeting room temperatures fluctuate throughout the day, it is advisable to dress in layers.

Scent-Aware Environment

Some individuals are more sensitive to certain scents and the chemicals used to create those scents. We ask that registrants be more scent-aware before attending our seminars, and minimize the use of fragrances as a courtesy to everyone sharing the same learning space.

Lunch & Coffee Service at Seminars

Coffee service is provided at all seminars. Lunch is provided only at full-day seminars. Breakfast is not provided except at Executive Breakfast seminars, and at certain PD events that begin earlier in the morning.

Special Dietary Requirements

We will do our best to accommodate requests for special dietary considerations for attendees who have food allergies, as well as vegetarian or vegan requests, but please note that personal preferences, such as a preference for one type of protein over another, will not be accommodated. Please inform us at the time of registration if you have any food allergies (NOT preferences). We will pass along your name and information to the catering staff at the seminar facility and you will need to identify yourself to the server at lunch time. Note that this only applies to full-day seminars where lunch is provided.

Late Arrivals

If you arrive late, you should complete and submit the Late Arrival Card, provided with the course material, to the instructor. This ensures you will receive the CPD credit for the time you were in attendance.

Public Practice Management

NOTABLE FORMAT
WEB SESSION

Considering Starting a CPA Practice – Online Session

If you are contemplating starting a practice, have not been in public practice for a considerable length of time, or have less than five years of experience in public practice, you may want to check out this free, on-demand web session.

The webinar will provide general information at the contemplation stage of starting a public practice, and will address a number of pre-registration considerations with focus on the high-level business and regulatory requirements of running a public practice. Specific content will include: personal assessment; technical competency; business planning; licensing and regulatory requirements; and summary of resources available.

Availability

This web-based, on-demand session is available on our website at pd.bccpa.ca. The session qualifies for 2 CPD hours upon successful completion of a quiz.

Starting a Successful CPA Practice

LEVEL Introductory

Prerequisite

None

Overview

This seminar provides key information and assessment of the skill sets and tools needed to start and develop a successful CPA practice. It provides the practical knowledge needed to build a strong practice management framework, improve quality of service and client satisfaction, and explore the skills and knowledge needed to develop and build a successful practice.

Who Should Attend

New practitioners in small or medium-sized practices, particularly those with limited experience in public practice or practice management.

Content

- the profile of the public practitioner
- public practice regulatory framework
- professional liability insurance, how much and how to.
- setting up your practice
- business planning, marketing and staffing
- determining your practice profile
- fee levels, billing and collecting
- client management
- staffing, is it necessary?
- practice review, how to meet standards
- practice resources
- work/life balance

Comments from Past Attendees

"The topic itself is wonderful, and the material is in the right direction." "Incredibly helpful seminar." "Practical information."

Seminar Leader

Greg Buck, CPA, CA, B.Comm

Nov 16	9am-5pm	Sheraton Guildford, Surrey	[A83145B_SU]
Dec 04	9am-5pm	Sutton Place, Vancouver	[A83145C_VA]
Fee $450	PD Passport Valid 1	Passport Day	7 CPD Hours

Strategy, Governance, Risk & Human Resource

Strategic Management Certificate Program

An Introduction to Strategy Driven Budgeting

LEVEL Introductory to Intermediate

Prerequisite

None

Overview

Organizations need to better understand the impact of budgeting on the operations of their organizations. This seminar will cover traditional budgeting approaches, such as adjusted cost, to understand the strengths and weaknesses of these approaches before introducing Strategy-Based Budgeting (SBB), a well-established methodology that takes into account demand driven budgeting to allow for better forecasting of costs of operations.

Who Should Attend

Executive directors and senior staff who wish to understand strategy-driven budgeting, allowing their organizations to manage financial resources better while maintaining congruence with their goals.

Content

- traditional budgeting methods
- the purpose of budgeting
- how to link strategic initiatives and your business plan to your budget
- the impact of service delivery demand on fixed and variable components of the budget.
- "Good and Bad" variances, and how to better align limited resources to maximize outcomes and service delivery

Comments from Past Attendees

"I very much appreciated Bruce's knowledge and his willingness to share it." "Good grasp of practical challenges." "Great anecdotes, thanks!" "Really enjoyed the material. Speaker was engaging."

Seminar Leader

Bruce Acton, FCMC, MBA

Nov 20	9am-5pm	Van Conv Ctr West, Vancouver	[M83321A_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

Corporate Governance Essentials

LEVEL Intermediate

Prerequisite

None

Overview

This half-day seminar aims to develop and enhance the CFO's understanding of corporate governance using the CPA Canada's CFO Series as the starting point for the discussion. Participants will gain the knowledge and skills they need to understand the role and responsibilities of the CFO in the context of corporate governance and their responsibilities to the Board and/or audit committee.

Who Should Attend

Financial or other executive leaders who interact with and provide support to their Board, and also audit committee and other Board members who want an understanding of their role and responsibilities surrounding corporate governance.

Content

- introduction and overview
  - what is corporate governance?
  - essential elements of corporate governance system
  - an overview of internal control frameworks
  - understanding the link between governance & strategy
  - group work: participants work through a case study and conclude on the company's governance system
- the financial aspects of corporate governance
  - establishing the key performance indicators
  - using the 'pyramid of ratios" diagnostic model to uncover the
  - drivers of organizational performance
  - board and audit committee reporting requirements
  - group work: participants match pyramids of ratios to each respective company

Comments from Past Attendees

"It was a good overview of major issues." "Excellent presentation. Engaging presenter, made a somewhat dry topic interesting." "Very concise presentation of the information." "The speaker was very energetic and enthusiastic in presenting the course."

Seminar Leader

Scott Powell, CPA, CA

Nov 29	9am-12:30pm	Victoria Conf Ctr, Victoria	[M82100B_VI]
Fee $225	PD Passport Valid	1/2 Passport Day	3.5 CPD Hours

Employment Law & HR Practices

LEVEL Intermediate to Advanced

Prerequisite

Some human resources experience and planning responsibility within your organization.

Overview

The employment relationship is founded on principles of contract law and is considered by the courts to be a special kind of contract. Participants will gain a practical perspective concerning the relationship between the legal landscape for (mostly non-union) employment in Canada, and day-to-day human resources activities that impact their organization.

Who Should Attend

Business owners, and those who advise business owners, senior managers, CFOs, and controllers who are responsible for human resources issues in the workplace.

Content

In this session, you will learn about

- issues surrounding the hiring, maintaining and dismissal of employees, based on the employment contract
- the Canadian legal culture of employment
- the nature of employment
- common law vs. Employment Standards
- the value of written contracts
- privacy
- the basics of hiring and other human resources practices
- the theory of "notice"
- constructive dismissal

Comments from Past Attendees

"Presenter was knowledgeable and relevant." "Practical examples and current case law." "Good presenter, lots of material." "Very informative."

Seminar Leader

Gavin Marshall, BA (Hons), LL.B.

Oct 29	9am-5pm	Sutton Place, Vancouver	[M83650A_VA]
Nov 01	9am-5pm	Executive Plaza, Coquitlam	[M83650B_CO]
Nov 14	9am-5pm	Wingate, Kamloops	[M83650C_KA]
Nov 27	9am-5pm	Sheraton Guildford, Surrey	[M83650D_SU]
Feb 20	9am-5pm	Ramada Hotel, Kelowna	[M83650E_KE]
Mar 05	9am-5pm	Van Island Conf Ctr, Nanaimo	[M83650F_NA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

TITLE STATUS

NEW

Enterprise Risk Management Framework – COSO 2017

LEVEL Intermediate

Prerequisite

A general understanding of risk management programs.

Overview

Enterprise Risk Management—Integrating with Strategy and Performance, issued by COSO in 2017, highlights the importance of considering risk in both the strategy-setting process and in driving performance. The first part of the updated publication offers a perspective on current and evolving concepts and applications of enterprise risk management. The second part, the Framework, is organized into five easy-to-understand components that accommodate different viewpoints and operating structures and enhance strategies and decision-making.

This seminar provides a practical understanding of this updated Framework introduced by COSO and the link between this principle-based risk management framework and the traditional risk management methodologies deployed by companies. It also provides a link among this Enterprise Risk Management Framework and COSO 2013 Internal Control – Integrated Framework and COSO 2016 Fraud Risk Management Guide.

Who Should Attend

Chief Financial, Risk and Compliance Officers, Controllers, Internal Auditors and other members of management who are involved in, or desire to, develop an understanding of Enterprise Risk Management Programs for all types of organizations.

Content

- insight into the value of enterprise risk management when setting and carrying out strategy
- alignment between performance and enterprise risk management
- accommodates expectations for governance and oversight
- recognizes the globalization of markets and operations
- presents new ways to view risk to setting and achieving objectives
- expands reporting to address expectations for greater stakeholder transparency
- sets out core definitions, components, and principles for all levels of management involved in designing, implementing, and conducting enterprise risk management practices

Seminar Leader

Massood Oroomchi

Nov 21	1:30pm-5pm	Van Conv Ctr West, Vancouver	[M82028A_VA]
Fee $225	PD Passport Valid	1/2 Passport Day	3.5 CPD Hours

Risk Management Essentials

LEVEL Intermediate

Prerequisite

None

Overview

This half-day seminar aims to develop and enhance the CFO's understanding of risk management using the CPA Canada's 20 Questions and CFO Series as the starting point for the discussion. It will provide participants with the knowledge and skills they need to understand the role of the CFO in the context of risk management and their responsibilities to the board and/or audit committee. It will also help participants understand the different Enterprise Risk Management (ERM) frameworks available and the applicability to their own organization.

Who Should Attend

Financial or other executive leaders who interact with and provide support to their Board. It will also be of interest to audit committee and other Board members who want an understanding of their role and responsibilities around risk management.

Content

- introduction and overview
  - an overview of enterprise risk management
  - the CFO's responsibilities for risk management
  - the CFO as a Board resource in fulfilment of risk oversight
  - a definition of enterprise risk management
  - an overview of the most popular ERM frameworks
  - group work: participants are given different scenarios to provide feedback on adequacy of risk management processes and recommend improvements where required
- establishing risk reporting processes
  - the relationship between strategic planning and risk management
  - setting risk tolerances
  - establishing risk measures and early warning signs
  - monitoring and reporting on risk
  - group work: participants work through a case study to determine best risk measures to use and identify any early warning signs of risk

Comments from Past Attendees

"Good overview and right level of detail." "Comprehensive review with relevant examples." "Good information which was well broken down."

Seminar Leader

Scott Powell, CPA, CA

Nov 29	1:30pm-5pm	Victoria Conf Ctr, Victoria	[M82080B_VI]
Fee $225	PD Passport Valid	1/2 Passport Day	3.5 CPD Hours

TITLE STATUS

NEW

The Dynamics of Cultural and Generational Gaps in the Modern Business Family

LEVEL Introductory to Intermediate

Prerequisite

None

Overview

Tomorrow's generation of family business leaders will have a blend of global cultures. Bridging the generational gap is a challenge in itself, but understanding how different cultures and generations interact is vital to the continued success of these family enterprises. "Blended" families are becoming common and can be made of: two or more families of creation; two individuals originating from different cultures joining together to form a family; or family members educated and living in other cultures of the world.

Being part of a blended family can result in challenges such as clashing of new world cultures with old world elders; chameleon-like behaviours of new world family members to integrate within their current environments; impact of rapidly changing technology; how security is viewed; and different values. Navigating the dynamics of cultural and generational gaps can be daunting. Understanding global and generational gaps will positively impact modern business families operating in diverse structures.

In this seminar we will explore how business families can navigate the dynamics across cultures and generations. This will be an interactive and collaborative session where attendees will have an opportunity to share their experiences and takeaway ideas on how to handle challenges within their family enterprises. Mini cases will be introduced as a basis for discussion.

Who Should Attend

Multi-generational and/or cross cultural family business leaders (family and non–family), owners, independent family business board members and independent professional advisors working with family businesses.

Content

- three global cultures: individualist, collective harmony and honour - their origins, characteristics, and behaviours
- six generations labelled "GI" to the "Z" ; their differentiators such as characteristics, and behaviours
- a multidimensional framework for working across generations and cultures
- communication and problem solving styles of the global cultures and multi-generations
- behaviours around risk, authority; responsibility and accountability generationally and cross culturally

Seminar Leader

Sonja Weissenbacher, CPA, CA, FEA

Dec 12	9am-5pm	Van Conv Ctr West, Vancouver	[M83019A_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

AVAILABLE OPTION

WEB SESSION

Top Employment Issues Affecting Your Bottom Line

LEVEL Intermediate

Prerequisite

None

Overview

This half-day course will provide an overview of the top employment issues including recent developments in workplace law, focusing on those issues that materially impact the bottom line.

Who Should Attend

Anyone dealing with employment issues, whether you are in public practice or industry.

Content

In this session, you will learn how to

- better position yourself as a business advisor to assist clients to spot an issue before it becomes a liability
- identify employment risks facing your own or client organizations, and strategies to reduce them
- keep up-to-date with recent changes in the employment law
- manage severance risk through employment agreements
- prevent workplace harassment
- manage absenteeism
- protect employer intellectual property
- avoid hidden employment standards liabilities
- defensively use of contractors
- identify privacy compliance hot spots

Comments from Past Attendees

"A very good overview of employment issues." "I enjoyed the examples from real life." "A practical seminar."

Seminar Leader

J. Geoffrey Howard, LL.B.

Dec 11	1:30pm-5pm	Van Conv Ctr West, Vancouver	[M82051A_VA]
Fee $225	PD Passport Valid	1/2 Passport Day	3.5 CPD Hours

Workplace Law: All You Wanted to Know About and Were Afraid to Ask

LEVEL Intermediate

Prerequisite
Some human resources capability and planning responsibility within your organization.

Special Note
Participants should come to the session ready to participate with their own questions of a general nature, and will receive educational answers of a general nature related to common workplace law issues. No specific legal advice will be provided.

Overview
This course will cover the legal issues in workplace law that most frequently arise, impacting your organization's ability to deal effectively with human resources. Participants will be able to address with greater confidence workplace human resources issues that spill over into legal or potentially legal questions, and avoid common potential pitfalls in workplace legal issues.

Who Should Attend
Employers or those who advise employers, business owners, senior managers, CFOs, and controllers who are responsible for human resources issues in the workplace, have issues that arise regarding workplace and employment law in British Columbia, and have common productive questions they wish to pose.

Content
The subject matter of the seminar will depend in part on the specific topics that participants wish to address, but may include topics such as

- issues that arise for employers under the Employment Standards Act
- hiring practices, attendance management and absenteeism
- human rights accommodation of disabled employees
- termination of employment with and without cause and best practices related to termination post-employment obligations

Comments from Past Attendees
"One of the best seminars I've ever attended." "Very good and useful presentation." "I enjoyed this a lot. Interesting topics… enjoyed hearing about real life examples."

Seminar Leader
Gavin Marshall, BA (Hons), LL.B.

Dec 11	9am-12:30pm	Marriott Inner Harbour, Victoria	[M82140A_VI]
Feb 15	9am-12:30pm	Sutton Place, Vancouver	[M82140B_VA]
Fee $225	PD Passport Valid	1/2 Passport Day	3.5 CPD Hours

SPECIAL FEATURE

CERTIFICATE PROGRAM

Strategic Management Certificate Program

CPABC is pleased to present the Strategic Management Certificate Program. This four-part program focuses specifically on the critical components of leadership and strategy.

The four modules are:

- Strategic planning
- Risk management and governance
- Team development
- Change management

Each module is worth 7 CPD Hours. In order to qualify for the certificate, members are required to complete all four modules. Modules do not need to be taken in order.

Overview
The program allows participants to acquire substantive knowledge in these core business topics.

At the end of the program, 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 Should Attend
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.

Seminar Leader to be drawn from
Mia Maki, BA, MBA, FCPA, FCMA
Barbara VanDerLinden, FCPA, FCMA
Denise Wong, CPA, CA

See following the columns for description and dates of each session.

Strategic Planning

This interactive session will use case examples to examine the link between stated organizational goals, the business environment and visible strategies, with focus on the functional strategy level. You will gain an appreciation of the tools used to develop and execute successful strategies. You will also examine the strategies of your own organization relative to the competitive landscape. Exercises will provide opportunities to consider your own role relative to strategy formulation, execution and monitoring, and highlight opportunities to increase personal effectiveness.

Content

In this session, you will learn

- how organizations spot strategic opportunities and threats
- tools and processes for strategic planning used by leading companies
- effective practices for successful strategy execution throughout your organization
- opportunities to increase personal effectiveness in supporting your organization's strategy

Oct 26	9am-5pm	Four Seasons, Vancouver	[M83015D_VA]
Oct 30	9am-5pm	Ramada Hotel, Kelowna	[M83015E_KE]
Dec 07	9am-5pm	Marriott Inner Harbour, Victoria	[M83015F_VI]
Dec 11	9am-5pm	Van Conv Ctr West, Vancouver	[M83015G_VA]
Feb 21	9am-5pm	Hyatt Regency, Vancouver	[M83015H_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

Risk Management and Governance

This interactive session will examine different types of risks which can undermine the achievement of an organization's objectives, and the management approaches and tools used to manage them. You will examine the risk management policies, practices, and reporting used by leading organizations, assess your organization's approach to risk and consider your own role in this process. We will also overview director and board responsibilities and take an in-depth look at governance practices, with focus on not for profits, where many CPAs serve as volunteer directors. You will gain an appreciation of how these requirements link to your own role. This session is a must for members considering serving as directors, now or in the future.

Content

In this session, you will learn

- how to spot and assess a wide variety of risks
- tools and techniques for reducing the impact of risks on your organization
- how to implement risk reporting tools
- what are governance responsibilities and current practices
- how board structures and processes can help boards and directors perform
- how to increase your effectiveness in supporting risk management and governance in your organization

Oct 25	9am-5pm	Victoria Conf Ctr, Victoria	[M83025C_VI]
Nov 06	9am-5pm	Sutton Place, Vancouver	[M83025D_VA]
Feb 26	9am-5pm	Sutton Place, Vancouver	[M83025E_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

Team Development

Today's complex problems require the skills of diverse teams, and effective team performance is essential to success. This interactive session will provide participants with an in-depth understanding of factors impacting team effectiveness, including team design, stages of team development, and ingredients necessary for achieving results. Through experiential exercises, you will gain a greater appreciation of how team norms, internal team factors and communication patterns can enhance or hinder team performance and to understand the characteristics of successful teams. Small group and individual work will provide an opportunity to sharpen your teaming skills, to consider how personalities and your own personal style impact on team performance, and how you can support a team as a leader.

Content

In this session, you will learn

- the stages of team development
- how important it is to effectively design a team
- factors necessary for team success
- how to coach teams for increased effectiveness
- common norms of well-performing teams
- how communication patterns affect team results

Nov 22	9am-5pm	Van Conv Ctr West, Vancouver	[M83035D_VA]
Dec 06	9am-5pm	Marriott Inner Harbour, Victoria	[M83035E_VI]
Jan 28	9am-5pm	Sutton Place, Vancouver	[M83035F_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

Change Management

Why do most change initiatives fail? And why are some organizations good at 'change'? In a world where change is an imperative, this interactive session will focus on how organizations can improve the odds and how your leadership can support successful change. Participants will learn how organizational and human dynamics impact change initiatives, how to plan for change and will examine the main ingredients necessary for successful implementation. You will increase your understanding of reasons for resistance and how to win support. Interactive exercises will provide practice in change planning and implementation, and case studies will enhance your understanding of the 'art' of change.

Content

In this session, you will learn

- how to increase awareness and the impact organizational and human dynamics have on change initiatives
- the main steps in a change management process
- the importance of detailed and realistic transition plans
- how to increase the probability of successful change implementation

Oct 29	9am-5pm	Ramada Hotel, Kelowna	[M83045C_KE]
Nov 21	9am-5pm	Van Conv Ctr West, Vancouver	[M83045D_VA]
Nov 27	9am-5pm	Victoria Conf Ctr, Victoria	[M83045E_VI]
Jan 29	9am-5pm	Sutton Place, Vancouver	[M83045F_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

Taxation

TITLE STATUS
UPDATED

Advanced Tax Planning for Business Succession

(formerly Tax Planning for Private Enterprises on Business Succession)

LEVEL Intermediate to Advanced

Prerequisite

Familiarity with the existing tax rules in the ITA and experience in the areas of private company tax planning and transactions involving private company shares.

Overview

Business succession involving closely-held private enterprises can range from an intra-family estate plan to an arm's length sale of shares. This seminar will provide practical knowledge of the principal considerations in formulating and implementing business succession plans. The focus will be on income tax considerations, although key non-tax issues will also be identified. Salient tax considerations will be discussed and illustrated by reference to examples. Related planning points will also be covered.

Who Should Attend

Practitioners with clients who are owner-managers of private corporations, as well as in-house professionals of private enterprises, especially those facing succession issues.

Content

- identifying business succession alternatives
- principal tax and non-tax considerations
- estate freezes, wasting estate freezes, post-mortem strategies
- valuation issues and price adjustment clauses
- utilizing family trusts
- related-party attribution issues and split income rules (including new "TOSI" regime)
- alter ego trusts and joint spousal trusts
- intra-family succession
- section 84.1 re-characterization rules
- arm's length sales of shares
- pre-sale purifications
- utilizing the lifetime capital gains exemptions
- capital gains deferral rules
- divisive reorganizations and section 55
- using life insurance to fund taxes on death
- non-competition payments and related tax issues
- financing considerations
- case study illustrating alternative tax consequences
- tax checklist

Seminar Leaders

Asif Abdulla, JD
Alvin Lun, JD
Shawn Tryon, LL.B.

Nov 14	9am-5pm	Four Seasons, Vancouver	[T83020B_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

TITLE STATUS
UPDATED

Advanced Tax Planning Strategies

LEVEL Advanced

Prerequisite

Participants should have a good knowledge of personal and corporate income tax.

Overview

This full-day seminar provides a comprehensive review of various anti-avoidance provisions designed to prevent or discourage aggressive tax planning. Factual scenarios are provided in the materials that address objectives, statutory provisions, case law, results and risk analysis.

By the end of this course, participants will be able to understand and identify the application of various anti-avoidance provisions in ITA; as well as gain a greater understanding of tax planning techniques involving restructuring asset profiles, sale of a business, use of partnerships, and use of trusts.

Who Should Attend

Practitioners with a strong Canadian tax planning background who wish to add value to existing and potential client relationships by giving consideration to potential tax and estate planning opportunities.

Content

- managing tax avoidance risks
- tax planning strategies, divided into four main categories: restructuring asset profiles; sale of business
- use of partnerships; use of trusts
- inter-provincial planning
- general anti-avoidance rule
- shareholder benefit provisions
- arm's length relationships
- expense deductibility
- inadequate consideration
- attribution provisions
- stop-loss provisions
- surplus stripping, association etc.
- use of partnerships
- use of trusts

Ethics Content

This seminar contains 0.5 hours of ethics content.

Seminar Leader

Sheryne Mecklai, CPA, CA, TEP

Nov 27	9am-5pm	Sheraton Guildford, Surrey	[T83040A_SU]
Dec 03	9am-5pm	Sutton Place, Vancouver	[T83040B_VA]
Feb 08	9am-5pm	Hyatt Regency, Vancouver	[T83040C_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

TITLE STATUS: UPDATED
AVAILABLE OPTION: WEB SESSION

BC PST Refresher & Comparison with GST/HST

LEVEL Intermediate

Prerequisite

Familiarity with BC PST fundamentals and some knowledge of the British Columbia Provincial Sales Tax Act.

Overview

This session is designed to provide a high level overview of basic British Columbia Provincial Sales Tax rules and to address differences between BC PST and Goods and Services Tax/Harmonized Sales Tax It will help you recognize your (or your clients') PST responsibilities and entitlements. It is designed to be broad in scope and will not focus on any particular industry.

Who Should Attend

Advisors and industry practitioners who assist their clients or employers with any BC PST matters, including planning, compliance, and audit support.

Content

- BC PST tax base
- common BC PST exemptions
- BC PST registration requirements
- BC PST and GST/HST similarities and differences

Seminar Leader

James Capobianco

Mar 07	8am-10am	Sutton Place, Vancouver	[T81017A_VA]
Fee $130	PD Passport Valid	1/3 Passport Day	2 CPD Hours

TITLE STATUS: NEW
AVAILABLE OPTION: WEB SESSION

Cash Savings Opportunities in a Fast Paced World

LEVEL Introductory

Prerequisite

None.

Overview

With the speed of business change and the uncertainty in today's markets, it is imperative for companies to save cash wherever they can. There are many incentive and tax credit programs available for companies to take advantage of. Knowing what these incentives are, how to access them and when to access them can give companies an advantage in generating cash savings. In today's fast paced world, generating and preserving cash flow is critical to making your business a success.

Who Should Attend

Those responsible for taxation matters within companies, technical people interested in learning how to get cash/credits for their projects, finance people looking to pay less tax and improve cash inflows.

Content

Attendees will learn more about

- incentives and tax credits they may have heard of, and a few that they haven't
- how to access ways to save cash
- knowledge of what incentives/credits are out there is important, and timing is key

Seminar Leaders

Kevin Eck, P.Eng., MBA
Rod Hynes, CPA, CA

Oct 29	8am-10am	Sutton Place, Vancouver	[T81023A_VA]
Fee $130	PD Passport Valid	1/3 Passport Day	2 CPD Hours

TITLE STATUS
UPDATED

Corporate Restructuring – Fundamentals

(formerly Corporate Reorganizations)

LEVEL Intermediate

Prerequisite

Familiarity with the existing tax rules in the ITA.

Overview

Your client's business and personal situation is constantly changing. The existing business structure may no longer be suitable or ideal and your client is looking for tax-efficient alternatives. There are a number of corporate reorganization alternatives that can be implemented under the Income Tax Act. Some of the provisions are complex and often interact with related provisions or anti-avoidance provisions.

This full-day seminar highlights the fundamental income tax considerations that arise in corporate reorganizations, including a discussion of related provisions and key pitfalls to avoid. The seminar will use extensive examples to illustrate tips and traps to be aware of when initiating a corporate reorganization.

Who Should Attend

Practitioners or financial executives in industry who have some, but not extensive, experience in share/debt reorganizations, consolidations, wind-ups and amalgamations and the GAAR.

Content

- tax-deferred rollovers (other than Section 85)
- wind-ups
- amalgamations
- share exchanges and reorganizations
- anti-avoidance provisions
- divisive reorganizations

Seminar Leaders to be drawn from

Mike Coburn, BA(Hon), LL.B.
Shane Onufrechuk, FCPA, FCA
Andrew Taylor, CPA, CA

Nov 08	9am-5pm	Marriott Inner Harbour, Victoria	[T83170A_VI]
Nov 20	9am-5pm	Van Conv Ctr West, Vancouver	[T83170B_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

TITLE STATUS
UPDATED

Corporate Restructuring – Practical Applications

(formerly Restructuring Private Corporate Groups)

LEVEL Intermediate to Advanced

Prerequisite

Participants should have an understanding of the basic income tax act sections that are commonly used in reorganizations to the level provided in the seminar *Corporate Restructuring – Fundamentals* (formerly *Corporate Reorganizations*). Participants should have an understanding the related and associated rules to the level provided in the seminar *Corporate Tax – Small Business Deduction & Related Topics* (formerly *Tax Issues for Private Corporate Groups*). This seminar requires that participants be familiar with Sections 85, 86, 51.1, 85.1 as well as the related and associated corporation rules.

Overview

This seminar provides a practical approach to identifying, planning, documenting and implementing reorganizations of private corporate groups. By the end of this seminar, participants should be able to identify opportunities for restructuring in a private corporate group, develop alternatives, select the best alternative, and document the required steps for implementation.

Who Should Attend

Practitioners and managers involved in reorganizations or tax planning for groups of privately held companies.

Content

The course will be presented as several large case studies during which participants will

- identify problems and issues with the current structure
- propose alternative structures to meet the business objective
- walk through the steps, basic documentation required, and issues involved in implementing the solution

Seminar Leaders

Sandy Stedman, CPA, CA
Mike Stubbing, CPA, CA, CFP, TEP

Nov 01	9am-12:30pm	Sutton Place, Vancouver	[T82050A_VA]
Nov 30	1:30pm-5pm	Victoria Conf Ctr, Victoria	[T82050B_VI]
Fee $225	PD Passport Valid	1/2 Passport Day	3.5 CPD Hours

TITLE STATUS
UPDATED

Corporate Restructuring - Section 85: Transfer of Property

(formerly Section 85: Transfer of Property)

LEVEL Intermediate

Prerequisite

Familiarity with the ITA.

Overview

Professional accountants are often engaged by their clients to assist with transactions designed to accomplish objectives such as creditor-proofing, estate planning, corporate restructuring etc. Section 85 of the Income Tax Act is often required so that the client's objectives can be met in a tax-efficient manner. The provisions are complex and interact with a number of related and anti-avoidance provisions.

This seminar covers selected tax aspects of the transfer of property to a corporation and the use of the section 85 rollover rules. Each module contains specific examples and case examples designed to help participants review relevant tax theory and focus on major tax planning issues that need to be considered, including key anti-avoidance provisions to avoid and filing requirements.

Who Should Attend

Accountants in public practice or industry who would like to better understand how section 85 works and how to correctly prepare a T2057 election. Participants in this course may also find the Corporate Restructuring - Fundamentals (formerly *Corporate Reorganizations)* and *Advanced Tax Planning Strategies* courses beneficial.

Content

- purpose of Section 85
- conditions of application
- agreed amount – election and limits
- cost of consideration and other rules
- paid-up capital and legal characteristics of shares received
- anti-avoidance rules and other considerations
- election deadline and penalty

Seminar Leader

Andrew Taylor, CPA, CA

Dec 13	9am-5pm	Van Conv Ctr West, Vancouver	[T83080A_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

TITLE STATUS
UPDATED

Corporate Tax – Purchase and Sale of a Business

(formerly Purchase & Sale of a Business: Income Tax & Related Issues)

Prerequisite

Knowledge of the ITA and experience in providing income tax advice.

Overview

This seminar will provide an understanding of income tax issues with respect to the purchase and sale of a business and will have comments on other issues in a purchase or sale of a business. There will be at least six cases included, and these will be introduced at the end of the module to which they relate for application to the technical issues. They will be principally oriented to income tax issues and with respect to actual cases. There will be a case on family succession, and a module on non-tax issues. By the end of the seminar, participants should have acquired technical knowledge, and the application of that to real life facts in the sale and purchase of a business.

Who Should Attend

Practitioners, industry members, and those in privately owned businesses, who want technical and practical knowledge in taxation issues in the purchase and sale of a business.

Content

- how to start – commercial factors – EBITDA
- non-tax comments
- due diligence – income tax issues
- shares – vendor and purchaser
  - the payment of dividends
  - planning for the eligible dividends
  - safe income
  - the use of holding companies
  - sale to employees
  - application of issues to the cases
- assets – vendor and purchaser
  - tax rates for capital gains, goodwill, business income
  - the sale of goodwill
  - methods to defer the payment of tax
  - application of technical issues to cases
- other issues - vendor and purchaser
  - non-resident purchaser
  - provincial tax rates
  - transfers to other provinces
  - case on family succession
  - insurance in company
  - application of technical issues to cases
- other considerations – interest expense and earnouts
- model case study
- all of the cases will be revised to reflect the changes to the small deduction rules, safe income, income splitting and comments and legislation, if any, from the budget of 2018 on the reinvestment of corporate business surplus

Seminar Leader

Mary Power, CPA, CA

Nov 19	9am-5pm	Van Conv Ctr West, Vancouver	[T83210A_VA]
Jan 22	9am-5pm	Sutton Place, Vancouver	[T83210B_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

TITLE STATUS UPDATED

TITLE STATUS SHORTENED

Corporate Tax - RDTOH, CDA & Other Tax Accounts

(formerly Getting a GRIP on RDTOH, CDA & Other Tax Accounts)

LEVEL Intermediate

Prerequisite

Familiarity with the existing tax rules in the ITA.

Overview

With the addition of the Eligible Dividend regime in 2006, the addition of the eligible RDTOH account in 2019, and changing tax rates for eligible and ineligible dividends, tax planners are confronted with a multitude of tax accounts that need to be considered in conjunction with each other. This course will provide a detailed review of the key tax accounts for private corporations and tax planning where multiple tax accounts can either be used or impacted.

The course includes a series of mini-cases that demonstrate the issues that need to be evaluated when dealing with these accounts.

Who Should Attend

Professionals involved in tax planning for privately held companies and their shareholders.

Content

- basic considerations for all tax accounts
- GRIP
- LRIP
- RDTOH (including the new eligible RDTOH)
- CDA
- mini cases

Seminar Leaders

Sandy Stedman, CPA, CA
Mike Stubbing, CPA, CA, CFP, TEP

Oct 30	9am-12:30pm	Sutton Place, Vancouver	[T82021A_VA]
Nov 07	9am-12:30pm	Civic Hotel, Surrey	[T82021B_SU]
Jan 24	9am-12:30pm	Sutton Place, Vancouver	[T82021C_VA]
Fee $225	PD Passport Valid	1/2 Passport Day	3.5 CPD Hours

TITLE STATUS NEW

NEW

Corporate Tax – Section 55 How Safe are Your Dividends?

LEVEL Intermediate

Prerequisite

Familiarity with the existing tax rules in the ITA.

Overview

The rules in Section 55 can convert a tax free inter-corporate dividend to a capital gain. Before April 20, 2015 the anti-avoidance rules in Section 55 were rarely considered in private corporate tax planning. After April 20, 2015 practitioners need to consider Section 55 on all intercorporate dividends to avoid unexpected tax. This seminar provides participants with a basic understanding of the application of these rules to private corporations.

Who Should Attend

General practitioners at any level and tax specialists at the start of their career or looking for a refresher on the rules in Section 55. This seminar deals solely with private corporations and would not be of interest to practitioners or advisors whose practice does not include private corporations.

Content

- the reason for these rules
- the purpose test
- the exemptions that remain relevant to private corporations
- CRA statements and administrative policies in respect to the application of these rules
- the calculation of safe income on hand
- the allocation of safe income on hand to the issued shares

Seminar Leaders

Sandy Stedman, CPA, CA
Mike Stubbing, CPA, CA, CFP, TEP

Oct 30	1:30pm-5pm	Sutton Place, Vancouver	[T82024A_VA]
Nov 30	9am-12:30pm	Victoria Conf Ctr, Victoria	[T82024B_VI]
Jan 24	1:30pm-5pm	Sutton Place, Vancouver	[T82024C_VA]
Fee $225	PD Passport Valid	1/2 Passport Day	3.5 CPD Hours

TITLE STATUS: UPDATED
AVAILABLE OPTION: WEB SESSION

Corporate Tax – Shutting Down the Corporation

(formerly Tax Issues in Shutting Down a Corporation)

LEVEL Intermediate

Prerequisite
Familiarity with the existing tax rules in the ITA.

Overview
This seminar will focus on the many tax issues that arise – both compliance and planning-related – when shutting down a corporation. It will primarily focus on private companies. Common traps and planning opportunities that arise when shutting down corporations will be discussed.

Although there will be coverage of the issues associated with the winding-up of smaller "mom and pop" type corporations that are ceasing operations, this only represents a small portion of the course coverage. The remainder of the course coverage will be more applicable to corporations within larger corporate groups. As an "Intermediate" level course, there will not be any coverage of T2-specific issues, such as where to check on the T2 that a company has been amalgamated or dissolved.

Who Should Attend
Professionals who are involved in winding up/dissolving corporations or who advise clients that are involved in winding up/dissolving corporations. Particular focus will be placed on private companies

Content
- taxable wind-ups
- tax-deferred wind-ups
- tax-deferred amalgamations
- issues impacting shareholders of corporations being shut down
- issues relating to winding-up dividends
- tax issues relating to the disposition of shares and debts
- debt forgiveness issues that arise on winding up
- losses and ABILs
- clearance certificates, liability for tax debts, tax refunds, assessing a dissolved corporation
- PUC and ACB issues

Seminar Leader
Mike Stubbing, CPA, CA, CFP, TEP

Nov 22	1:30pm-5pm	Van Conv Ctr West, Vancouver	[T82210B_VA]
Fee $225	PD Passport Valid	1/2 Passport Day	3.5 CPD Hours

TITLE STATUS: UPDATED

Corporate Tax – Small Business Deduction & Related Tax

(formerly Tax issues for Private Corporate Groups)

LEVEL Intermediate

Prerequisite
Familiarity with the existing tax rules in the ITA.

Overview
This seminar covers the unique taxation issues that apply to groups of privately held companies and their access to the small business deduction. The seminar includes a detailed review of the association rules, a review of reductions of the small business deduction limit, a review of the specified partnership income and specified corporate income rules, basic considerations for inter-corporate dividends, trusts in the corporate group and basic HST/GST issues. Mini cases will be used to review the issues that arise during the growth of a corporate group and work through the concepts in the materials.

This course does not review of Section 55, Safe Income or related items.

Who Should Attend
Practitioners and managers involved with groups of privately held companies.

Content
- basic related, associated, and affiliated rules
- the rules that modify the associate rules
- SBD Limit reductions – taxable capital and passive income
- the results of associating corporations
- deemed association,
- partnerships in the group including the specified partnership oncome rules.
- specified corporate oncome
- use of trusts in the group
- Part IV tax between private corporations
- HST/GST closely related exemption.

Seminar Leaders
Laird Branham, CPA, CA
Sandy Stedman, CPA, CA

Oct 31	9am-5pm	Four Seasons, Vancouver	[T83041A_VA]
Nov 06	9am-5pm	Civic Hotel, Surrey	[T83041B_SU]
Jan 23	9am-5pm	Hyatt Regency, Vancouver	[T83041C_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

TITLE STATUS

NEW

Corporate Tax – Scientific Research and Experimental Development (SR&ED): Fundamentals

LEVEL Introductory

Prerequisite

None.

Overview

The Scientific Research and Experimental Development Program (SR&ED) provides federal tax credits of over $2.4 billion a year to over 20,000 companies that have performed research and development in Canada. This course offers an introduction to the SR&ED program in Canada. It offers an opportunity to consider the types of work that are included as eligible SR&ED, with reference to live examples. The allowable and qualified expenditure rules are also covered, with a focus on qualifying for refundable credits for CCPCs.

At the end of this introductory course, you will understand the basics of the SR&ED program and have practical tools to compile and defend claims.

Who Should Attend

Practitioners and SR&ED managers seeking to understand the benefits, approaches and common pitfalls associated with SR&ED claims.

Content

- introduction to grants and incentives in Canada – why and how does the government support R&D
- elements of eligible SR&ED projects – how to identify a claim
- calculating SR&ED expenditures and deductions and investment tax credits
- accessing refundable credits – CCPC status and the expenditure limit
- tips and traps in claim preparation, filing and defending claims

Note

CPA Canada offers a 22.5 hour blended learning course on Scientific Research & Experimental Development. See CPA Canada's website for more information.

Seminar Leader

Joanne Hausch, CPA, CA, ICD.D

Nov 08	9am-12:30pm	Sutton Place, Vancouver	[T82011A_VA]
Fee $225	PD Passport Valid	1/2 Passport Day	3.5 CPD Hours

TITLE STATUS

UPDATED

Corporate Tax – Scientific Research and Experimental Development (SR&ED): Advanced

(formerly Scientific Research & Experimental Tax Credits)

LEVEL Advanced

Prerequisite

Tax experience and knowledge of the SR&ED program, or previous attendance at the seminar Corporate Tax - Scientific Research and Experimental Development: Fundamentals.

Overview

This updated course provides a comprehensive review of the legislation, policies and practicalities of preparing, filing and supporting Scientific Research and Experimental Development (SR&ED) claims. The focus is on some of the more challenging and complex issues that professionals are likely to encounter. This practical seminar will guide you through the documentation and claim process as well as CRA reviews. The technical aspects of eligible work are covered at a high level with examples based on relevant case law and CRA's administrative policies. Financial/costing issues are covered in more detail.

Who Should Attend

Professionals and experienced R&D project managers who wish to increase their understanding of the SR&ED program.

Content

- an overview of the "technology" eligibility criteria including examples
- discussion of the documentation required to support claims
- eligible costs and calculation of investment tax credits
- tips and traps in claim preparation, filing and reviews
- updated summary of significant tax court decisions
- case study, including related federal and provincial tax calculations
- overview of grants and direct incentives

The seminar has been updated to include the changes to legislation and administrative policies up to July 15, 2018.

Note

CPA Canada offers a 22.5 hour blended learning course on Scientific Research & Experimental Development. See CPA Canada's website for more information.

Seminar Leader

Joanne Hausch, CPA, CA. ICD.D

Nov 15	9am-5pm	Four Seasons, Vancouver	[T83050A_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

TITLE STATUS
UPDATED

Corporate Tax – Tax Returns, Compliance, and Planning

(formerly Tax Returns: Corporate)

LEVEL Introductory

Prerequisite

Some experience with corporate tax preparation would be beneficial, but not essential.

Overview

This seminar provides participants with a broad overview of income tax issues which can impact taxpayers filing their corporate tax returns. It provides a comprehensive review of income tax compliance and planning issues relevant to the preparation of Canadian corporate income tax returns. Participants will gain an overall understanding of tax compliance issues, enhancing their ability to prepare complete and accurate tax returns, and to identify and address planning opportunities which arise in the preparation of corporate income tax returns.

Who Should Attend

Practitioners who want a refresher and update, or those who have been away from corporate taxes for some time and want an understanding of the issues which may arise in corporate tax return preparation; or professionals seeking to build on their basic knowledge of corporate tax issues.

Content

- net income for tax purposes
- asset transactions
- taxable income
- corporate relationships
- federal corporate taxes
- administration and disclosure
- provincial issues

The seminar materials provide greater depth of discussion, particularly in more complex areas or areas less frequently encountered in practice, and are intended as an ongoing reference source for participants. Dependent on class discussion, not all topics in the material may be covered in class but the material is intended as an ongoing reference source.

Seminar Leader to be drawn from

Denise Lammi, CPA, CA
Dave Rickards, CPA, CA
Andrew Taylor, CPA, AC

Nov 16	9am-5pm	Executive Plaza, Coquitlam	[T83220A_CO]
Nov 19	9am-5pm	Coast Capri, Kelowna	[T83220B_KE]
Nov 23	9am-5pm	Marriott Inner Harbour, Victoria	[T83220C_VI]
Nov 30	9am-5pm	Sheraton Guildford, Surrey	[T83220D_SU]
Dec 05	9am-5pm	Hyatt Regency, Vancouver	[T83220E_VA]
Feb 19	9am-5pm	Sutton Place, Vancouver	[T83220F_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

TITLE STATUS
UPDATED

Current Strategies in Tax Dispute Resolution

LEVEL Intermediate

Prerequisite

None

Overview

This half-day seminar is designed to introduce practitioners to the CRA dispute resolution process, and to provide an understanding of the importance of taking the appropriate steps as a means of obtaining cost effective and efficient resolution to potential tax litigation matters.

Who Should Attend

Those who deal with the CRA, whether on an infrequent or regular basis.

Content

- current audit issues
  - some of the areas now under review
- strategies for winning tax disputes
  - records retention policies
  - what you can keep or throw away
  - organizing files
- dealing with the audit division
  - CRA's power of inspection
  - what clients should do when CRA comes calling
  - responding to proposal letters
  - the reassessment stage – notices of objection
  - validity of the reassessment
  - gathering information from CRA to contest the reassessment
  - drafting notices of objection
- appeals to the Tax Court of Canada and the Federal Court
  - which is the correct forum
  - accountants serving as (expert) witnesses
  - role of the accountant in judicial proceedings

Comments from Past Attendees

"Good opportunity to ask questions and discuss issues. Great reference material." "Comprehensive coverage of topics discussed." "Liked the pace of the presentation and the opportunity for discussions and questions from the participants."

Seminar Leader

Ed Kroft, Q.C., CPA (Hon.)

Dec 11	9am-12:30pm	Van Conv Ctr West, Vancouver	[T82112A_VA]
Fee $225	PD Passport Valid	1/2 Passport Day	3.5 CPD Hours

TITLE STATUS
UPDATED

GST/HST – CRA Audit

(formerly GST/HST: Preparing for an Audit)

LEVEL Intermediate

Prerequisite

Good working knowledge of GST/HST rules, or previous attendance of GST/HST – Fundamentals (formerly GST/HST – The Basics).

Overview

If your company is selected for a GST/HST audit, it's not always known what to expect or how to prepare for the auditor. While most businesses do not intentionally misreport amounts in their GST return, unintentional errors can easily occur. This seminar will provide an overview of a typical Canada Revenue Agency (CRA) GST/HST audit from start to finish and discuss the top common audit exposures. CRA audit assessments can be substantially reduced when accountants and practitioners learn how to identify GST/HST issues before a CRA audit occurs. Participants will learn how to identify the most common compliance exposures, which will be illustrated using everyday examples applicable to businesses of all sizes.

This course will also explain how to proactively prepare for a future audit, provide tips on how to manage an audit, and deal with after-audit issues including the assessment of penalties and the objection process. Being proactive is the key to an audit with a good outcome.

Who Should Attend

Professionals and other advisors who want to obtain a greater understanding of the top common GST/HST audit issues and the audit process.

Content

- audit basics
- before the audit
- during the audit
- finalizing the audit
- after the audit
- common audit issues

Seminar Leader

Katherine Xilinas, LL.B.

Nov 22	9am-5pm	Van Conv Ctr West, Vancouver	[T83291A_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

TITLE STATUS
UPDATED

GST/HST – Fundamentals

(formerly GST/HST: The Basics)

LEVEL Intermediate

Prerequisite

None.

Overview

The application of GST/HST is often far more complex than practitioners or businesses appreciate. The principles involved can be quite different from those applied to income tax. This course will review a variety of important concepts related to the application and the recovery of GST/HST, including the often misinterpreted or misunderstood place of supply rules.

Registration, collection requirements, who pays tax, input tax credit entitlements and some cross border issues will be described. Also, sources of errors and assessments frequently discovered during an audit performed by the CRA or during a review of client's records will be highlighted. Participants will gain a fundamental understanding of how the GST/HST works as a value-added tax, and an update on what is new and what issues are trending.

Who Should Attend

Professionals and other advisors who want to obtain a greater understanding of the value-added-sales tax system in Canada. It will be beneficial to those who deal with the Goods and Services Tax (GST) and Harmonized Sales Tax (HST) on a daily basis who would like a refresher on the current legislation and an update on trending issues.

Content

- GST/HST basics
- who pays GST/HST?
- collecting GST/HST
- GST/HST place-of-supply rules and their significance
- other collection issues
- import and export issues
- general recovery rules
- temporary large business restrictions
- employee reimbursements and allowances
- reporting net tax - an overview
- compliance issue overview

Seminar Leader

Ron Osborne, CPA, CA

Nov 07	9am-5pm	Hyatt Regency, Vancouver	[T83100A_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

TITLE STATUS
UPDATED

GST/HST – NFPOs

(formerly GST/HST Issues for the Non-Profit Sector)

LEVEL Introductory to Intermediate

Prerequisite

Good general understanding of GST/HST system.

Overview

The non-profit sector covers a wide spectrum of activities including clubs and professional associations, schools, hospitals, supportive housing and health services, and other charitable works. The application of GST/HST to these activities and its recovery through rebates and input tax credits is usually far more complex than in a commercial enterprise and may vary significantly depending on the legal form of the organization. Failure to be aware of these complexities can result in lost opportunities or worse, large tax assessments against the organization.

This seminar will focus on the unique rules applicable to public service bodies, including the distinction between charities and other non-profit organizations. Other exemptions which may apply to some non-profit organizations, such as health care or education, will be reviewed briefly. The course will also briefly examine issues related to the construction of housing and similar property by non-profit organizations. Participants will gain a greater awareness of the application of GST/HST and exempting provisions applicable to this unique sector, including common pitfalls and errors.

Who Should Attend

Professionals involved in the accounting for non-profit organizations including directors, general practitioners or other advisors who are responsible for, or provide advice on financial matters to, such organizations.

Content

- brief review of GST/HST basics including relevant GST/HST place of supply rules
- review of issues related to grants, donations and fund-raising activities
- review of GST/HST exemptions unique to public service bodies (other than municipalities),
- GST/HST rebates and input tax credit entitlements
- GST/HST registration and accounting
- review of common pitfalls & errors
- brief discussion of other exemptions applicable to some NFPOs such as housing, health care or education

Seminar Leader

Ron Osborne, CPA, CA

Nov 20	9am-5pm	Van Conv Ctr West, Vancouver	[T83190A_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

TITLE STATUS
UPDATED

GST/HST - Real Property

LEVEL Intermediate

Prerequisite

Good understanding of basic GST/HST rules and the input tax credit system.

Overview

The application of GST/HST to real property transactions can be very complex, particularly when part of the property may include a residential component. Failure to appreciate these complexities, especially rules related to deemed supplies and exemption entitlements can result in significant and unexpected liabilities.

This seminar will increase awareness of some of the important GST/HST issues associated with real property transactions, including construction or substantial renovation of residential property, sale of real property including contract assignments, joint-ventures and partnerships, issues related to leasehold allowances and expense recoveries, and the special rules applicable to supplies of real property by charities and other public service bodies. The seminar will be in a lecture format, using examples drawn from CRA rulings, case law and real-life experiences of the presenter and participants.

Who Should Attend

General practitioners, company accountants and others who provide advice on, or participate in, purchase, sale or rental of real property.

Content

- review of basic concepts including definition of residential complex and builder
- review of major sale and rental exemptions
- deemed self-supply rules related to construction or renovation of a residential complex
- construction and 'sale' of residential projects on leased land including first nations
- use of joint-ventures and partnerships
- important differences between condominium and bare land strata
- review of ITC entitlements & restrictions
- review of tax collection & reporting obligations of registrants and non-registrants
- review of special rules applicable to the not-for-profit sector
- where appropriate, a brief review of important provincial tax issues associated with real property transactions

Seminar Leader

Ron Osborne, CPA, CA

Nov 05	9am-5pm	Hyatt Regency, Vancouver	[T83150A_VA]
Jan 16	9am-5pm	Sutton Place, Vancouver	[T83150B_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

TITLE STATUS

UPDATED

GST/HST – Specific Topics

(formerly GST/HST: Beyond the Basics)

LEVEL Intermediate

Prerequisite

Previous attendance of *GST/HST – Fundamentals* (formerly *GST/HST – The Basics*), or equivalent knowledge.

Overview

Failure to be aware of the complexities of the GST and HST can result in lost opportunities, or worse, large tax assessments. GST/HST - Fundamentals introduced the basic rules regarding how the GST/HST system works. This course builds upon that knowledge, with an overview of important GST/HST issues and discussion of further concepts related to the application and the recovery of GST/HST. More collection issues will be presented including early payment discounts and the treatment of bad debts. There will be an overview of the definition of "consideration" and the importance of proper characterization and identification of taxable supplies. A review of ITC entitlement issues will focus on common recovery issues encountered by registrants including reimbursements. Additional cross border issues will be presented including the new drop-shipment rules, and an overview of some hot topics related to real property, sale of a business and the health care industry will also be presented.

Who Should Attend

Practitioners, accountants in business or industry and other advisors who want to obtain a deeper understanding of our value-added sales tax system in Canada.

Content

- introduction
- review of important concepts
- collection issues
- common recovery issues
- cross border issues
- other issues
- audits, assessments and directory liability

Seminar Leader to be drawn from

Charlotte Hoggard, CPA, CGA, CFI
Ron Osborne, CPA, CA

Oct 22	9am-5pm	Victoria Conf Ctr, Victoria	[T83101A_VI]
Oct 26	9am-5pm	Sheraton Guildford, Surrey	[T83101B_SU]
Nov 06	9am-5pm	Best Western, Courtenay	[T83101C_CR]
Nov 09	9am-5pm	Executive Plaza, Coquitlam	[T83101D_CO]
Nov 14	9am-5pm	Ramada Hotel, Prince George	[T83101E_PG]
Nov 19	9am-5pm	Van Conv Ctr West, Vancouver	[T83101F_VA]
Jan 17	9am-5pm	Sutton Place, Vancouver	[T83101G_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

TITLE STATUS

NEW

AVAILABLE OPTION

WEB SESSION

GST/HST - Tips and Traps

LEVEL Intermediate

Prerequisite

Familiarity with GST/HST fundamentals and some knowledge of the Excise Tax Act.

Overview

This session will serve as an introduction/refresher to common GST/HST tips and traps. It is a high level overview designed to make you aware of common mistakes and audit issues, and to help you better design the efficiency of your (your clients') GST/HST function. It is designed to be broad in scope and will not focus on any particular industry.

Who Should Attend

Advisors and industry practitioners who assist their clients or employers with any GST/HST matters, including planning, compliance, and audit support.

Content

- place of supply rules
- zero-rated exports
- input tax credits entitlements and restrictions
- common GST/HST elections

Seminar Leader

James Capobianco

Nov 28	8am-10am	Sutton Place, Vancouver	[T81018A_VA]
Fee $130	PD Passport Valid	1/3 Passport Day	2 CPD Hours

TITLE STATUS

UPDATED

Income Tax – 5 Years of Developments

(formerly Catching Up: 5 Years of Income Tax Developments)

LEVEL Intermediate

Prerequisite

Comprehensive understanding of basic corporate and personal income tax.

Overview

Income tax changes and evolves over time. "Keeping up" is necessarily a continuous process. Unfortunately, many people don't have the time or resources and consequently fall behind. They wonder how they can "catch up" on a few recent years of changes at one time. This seminar provides an opportunity for those who haven't regularly taken tax update seminars to get "caught-up" on notable federal income tax developments over the past five years and discover what they may have missed.

Who Should Attend

Anyone, whether in public practice, industry, or the public sector, who feels that they have not paid enough attention to recent income tax developments.

Content

- calculation of income
- expenses and deductions
- capital cost allowance
- taxation of gains
- retirement saving
- income splitting
- tax credits
- rules that defer, deem, trigger, prevent or reduce
- federal income tax rates
- income tax administration
- various other developments

Seminar Leader to be drawn from

Tara Benham, FCPA, FCA
Denise Lammi, CPA, CA
Mark Ostry, CPA, CGA

Nov 02	9am-5pm	Quality Bayside, Parksville	[T83060A_PA]
Nov 06	9am-5pm	Hyatt Regency, Vancouver	[T83060B_VA]
Nov 20	9am-5pm	Sheraton Guildford, Surrey	[T83060C_SU]
Nov 20	9am-5pm	Marriott Inner Harbour, Victoria	[T83060D_VI]
Dec 07	9am-5pm	Coast Capri, Kelowna	[T83060E_KE]
Feb 22	9am-5pm	Hyatt Regency, Vancouver	[T83060F_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

TITLE STATUS

NEW

Income Tax – Assessments, Objections, Voluntary Disclosure and Risk

LEVEL Introductory

Prerequisite

None.

Overview

This seminar is designed to help professional advisors reduce their exposure to liability in their tax practices. The seminar focuses on the procedures and processes of practicing in the tax area, highlighting areas where a better job could be done to protect practitioners from liability. In addition, the seminar will include a discussion of technical issues associated with the areas where AICA claims experience show the greatest number and dollar value of claims. In addition, the seminar will review the scheme of penalties and interest in the Act, the CRA's current administration of those provisions, and the use of the Taxpayer Relief provisions to reduce the cost of penalties. It is beyond the scope of this course to discuss all areas of risk a professional advisor may encounter.

Who Should Attend

Practitioners who want to obtain a better understanding of some of the areas of risk, and new practitioners who may find the information useful in developing their tax services. General practitioners and members in industry who are responsible for tax reporting compliance may also find this seminar beneficial.

Content

- management and administration - areas which tax advisors should exercise caution to reduce their risk of exposure to a lawsuit
- tax service responsibility
- dealing with Canada Revenue Agency
- researching tax law
- tax compliance
- malpractice lawsuit
- risk areas and "top 10" liability insurance tax problems
- interest: corporate taxes; individuals; instalments; GST/GST; payment and instalments; refund interest; and interest offset rules
- penalties – nature and type, including penalties on information returns; income tax; electronic filing; GST/HST; GST/HST wash transactions; gross negligence; payroll, source deductions, and non-resident withholdings; foreign reporting; and third party penalties
- refunds, payments, and filing, including when a refund can be issued; when a refund can be held; offsets; collections; and filing and proof of delivery
- taxpayer relief provisions including objectives; when they apply; how to apply; appealing a request; and due diligence defense
- voluntary disclosures requirements and examples

Seminar Leader

Mark Ostry, CPA, CGA

Nov 30	9am-12:30pm	Sutton Place, Vancouver	[T82164A_VA]
Fee $225	PD Passport Valid	1/2 Passport Day	3.5 CPD Hours

TITLE STATUS

NEW

Income Tax – BC Real Estate Tax

LEVEL Introductory

Prerequisite

None.

Overview

This seminar will provide update on various real estate related tax measures announced at the Federal (Federal Budget), Provincial (BC Budget), and Municipal levels (Vancouver – Empty Homes Tax). We will discuss how such tax measures (speculation tax, school tax, foreign buyer's tax, increase in property transfer tax, empty homes tax) can impact both real estate ownership and real estate development.

We will also highlight some common income tax issues and traps (multi-tier partnerships structures, capital vs. inventory, rollover transactions, capitalize vs. expense, etc.) that can arise throughout the real estate development cycle.

Who Should Attend

Members who would like a greater understanding of how recent provincial real estate tax measures will affect real estate ownership and/or real estate development. This will be particularly helpful to members in the real estate industry, or those who have clients in the real estate industry.

Content

- Federal Budget
- tiered partnerships
- BC Budget: Real Estate Tax
- speculation tax
- school tax
- increase in property transfer tax
- foreign buyer's tax
- empty homes tax (City of Vancouver)
- BC budget: other real estate measures
- tracking of beneficial ownership
- condo pre-sale registry
- use of beneficial ownership / nominee companies
- real estate development life cycle
- impact of recent tax measures
- common income tax issues

Seminar Leaders

Roque Hsieh, CPA, CA
Henry Liao, CPA, CA

Nov 30	8am-10am	Sutton Place, Vancouver	[T81019A_VA]
Fee $130	PD Passport Valid	1/3 Passport Day	2 CPD Hours

TITLE STATUS

UPDATED

Income Tax - Employee Benefits

(formerly Taxation of Employee Benefits)

LEVEL Intermediate

Prerequisite

Basic understanding of personal and corporate taxation.

Overview

Attracting and retaining skilled employees is a critical success factor for most businesses, and most employers provide formal and informal benefits as part of their compensation plans. The morale boost of employee benefits can quickly become a morale bust when employees receive an unexpected tax bill when the Canada Revenue Agency takes an interest. This half-day seminar provides a review of the income tax implications of benefits conferred on employees by their employers, including both owner-managers and arm's length employees. Participants will enhance their understanding of the income tax issues which arise from various types of benefits, assisting them in assessing the tax-effectiveness of various benefit plans and choices of employment benefits, and ensuring compliance with the tax rules. Participants will also enhance their ability to advise on tax-effective employee remuneration strategies using benefit plans.

Who Should Attend

Employers, and their advisors, who want an understanding of the taxation of employee benefits in general, and of specific benefits which are either common in practice, or have unusual income tax complexities.

Content

- income tax treatment of benefits
- employee allowances and automobile benefits
- goods and services tax
- loans
- planning opportunities for key employees
- other employee benefits

Seminar Leader

Mark Ostry, CPA, CGA

Jan 25	9am-12:30pm	Sutton Place, Vancouver	[T82120A_VA]
Fee $225	PD Passport Valid	1/2 Passport Day	3.5 CPD Hours

TITLE STATUS UPDATED

Income Tax – Essentials for General Practitioners

(formerly General Practitioners "Need to Know…")

LEVEL Intermediate

Prerequisite

General corporate and personal income tax knowledge.

Overview

Adverse income tax consequences can be unexpectedly triggered in even straightforward and seemingly benign happenings. This seminar will equip participants with skills to identify, prevent, and manage such outcomes. Topics are introduced by setting scenes with common transactions or events before approaching the unfortunate tax result. The income tax rules and reasons the particular situation was "caught" or "exposed" are explained. Suggestions are provided to manage and mitigate should such a problem arise. Pointers to help participants recognize relevant precursors and triggers are provided. The course notes provide detailed background information.

Who Should Attend

CPAs who are not tax specialists; and work in an environment where income tax consequences matter.

Content

- intercorporate dividends and exposure to taxation as a capital gain
- individuals selling shares to non-arm's length corporations
- family income splitting
- select obstacles to claiming the small business deduction
- stop loss rules
- several other areas where unfortunate income tax results can occur

Seminar Leader to be drawn from

Denise Lammi, CPA, CA
Mark Ostry, CPA, CGA

Oct 30	9am-5pm	Ramada Hotel, Kelowna	[T83130A_KE]
Nov 28	9am-5pm	Sheraton Guildford, Surrey	[T83130B_SU]
Dec 03	9am-5pm	Hyatt Regency, Vancouver	[T83130C_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

TITLE STATUS UPDATED

Income Tax - Everyday Issues for General Practitioners

(formerly Everyday Income Tax Issues for the General Practitioner)

LEVEL Intermediate

Prerequisite

General corporate and personal income tax knowledge.

Overview

CPAs in public practice who assist clients with income tax compliance and plans find that even routine matters can have complexities, alternatives and uncertainties. This seminar identifies income tax matters frequently encountered by practitioners and demonstrates how the income tax rules apply in everyday situations. Topics are approached as practical issues rather than technical details. General background information is provided to promote an understanding of each issue. Opportunities, problems, suggestions and planning are emphasized. Many participants take this seminar again and again because the content is relevant to client situations and because each year there is something new.

Who Should Attend

Practitioners who have general income tax knowledge and deal with small and medium-sized owner-managed businesses.

Content

- taxation of select sources of income including active business income, small business deduction, employees vs. contractors, personal services businesses and investment income
- remuneration issues including salary vs. dividends, bonuses payable and income splitting with family members
- expenses and assets with personal and business elements — including meals and entertainment, automobiles, taxable benefits
- shareholder benefits and loans issues - including debit balances
- timely and topical practical matters
- newsy and notable information, recent developments
- challenging ethical situations encountered in a tax practice

Ethics Content

This seminar contains 0.75 hours of ethics content.

Seminar Leaders to be drawn from

Tara Benham, FCPA, FCA
David Gautier, CPA, CA
Ken Laloge, CPA, CA
Denise Lammi, CPA, CA
Elvin Law, CPA, CGA
Mark Ostry, CPA, CGA
Brian Sanders, CPA, CA

Oct 24	9am-5pm	Four Seasons, Vancouver	[T83090A_VA]
Oct 26	9am-5pm	Victoria Conf Ctr, Victoria	[T83090B_VI]
Nov 05	9am-5pm	Coast Hotel, Kamloops	[T83090C_KA]
Nov 08	9am-5pm	Ramada Hotel, Kelowna	[T83090D_KE]
Nov 08	9am-5pm	Van Island Conf Ctr, Nanaimo	[T83090E_NA]
Nov 09	9am-5pm	Ramada Hotel, Prince George	[T83090F_PG]
Nov 19	9am-5pm	Sheraton Guildford, Surrey	[T83090G_SU]
Feb 21	9am-5pm	Hyatt Regency, Vancouver	[T83090H_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

TITLE STATUS

NEW

Income Tax - Income Splitting, A New Era

LEVEL Introductory to Intermediate

Prerequisite

General corporate and personal income tax knowledge.

Overview

Families that function as a single economic unit can benefit from tax savings if income can be taxed in the hands of lower-income family members. This is referred to as income splitting. The Income Tax Act contains several measures related to income splitting, and while some are permissive, most are restrictive. The latest of these, the new "tax on split income" (TOSI) rules are effective commencing 2018, and their implications are far-reaching and punitive. Consequently, many former structures and plans will no longer achieve the intended results and may trigger adverse income tax consequences. Further, some situations may be caught when income splitting was not an objective. This half-day seminar covers the tax benefits of income splitting, a detailed review of relevant income tax legislation, and an overview of remaining opportunities to accomplish income splitting. It also covers suggestions and planning to manage, mitigate and restructure with a view to the TOSI rules.

Who Should Attend

Practitioners with a basic knowledge of income tax, who advise individuals, professionals or business owners on matters related to income splitting.

Content

- introduction to income splitting
- rules that restrict or impede income splitting
- attribution; tax on split income (TOSI); reasonableness
- rules that permit income splitting
  - CPP splitting; spousal RRSPs; split pension rules and implications; RESPs; transfers for fair market consideration; FMV loans
- income splitting strategies
  - former strategies that still work; new strategies to consider; former structures that need revision and planning ideas; suggestions to manage and mitigate for recent TOSI development

Seminar Leader to be drawn from

Denise Lammi, CPA, CA
Mark Ostry, CPA, CGA
Andrew Taylor, CPA, CA

Nov 19	1:30pm-5pm	Marriott Inner Harbour, Victoria	[T82012A_VI]
Nov 20	9am-12:30pm	Ramada Hotel, Prince George	[T82012B_PG]
Nov 21	9am-12:30pm	Best Western, Nanaimo	[T82012C_NA]
Nov 22	9am-12:30pm	Coast Hotel, Kamloops	[T82012D_KA]
Nov 23	9am-12:30pm	Executive Plaza, Coquitlam	[T82012E_CO]
Nov 26	9am-12:30pm	Sutton Place, Vancouver	[T82012F_VA]
Dec 06	9am-12:30pm	Quality Hotel, Abbotsford	[T82012G_AB]
Dec 11	9am-12:30pm	Coast Capri, Kelowna	[T82012H_KE]
Jan 28	9am-12:30pm	Sheraton Guildford, Surrey	[T82012I_SU]
Jan 30	9am-12:30pm	Sutton Place, Vancouver	[T82012J_VA]
Fee $225	PD Passport Valid	1/2 Passport Day	3.5 CPD Hours

TITLE STATUS

UPDATED

Income Tax – Issues for File Preparers

LEVEL Intermediate

Prerequisite

General corporate and personal income tax knowledge.

Overview

Accountants who prepare files and income tax returns often see the issues, problems and opportunities first. This seminar uses the seminar material from *Income Tax – Everyday Issues for General Practitioners*, but presents it with a focus on matters more relevant to the "front line" firm members. Planning, problems, and approaches will be emphasized because in real life, client situations don't come with an instruction manual.

Who Should Attend

Tax preparers, including technicians, para-professionals, newly qualified accountants, or staff accountants, who have (or are learning) general income tax knowledge and deal with small and medium-sized businesses that are owner-managed.

Content

- taxation of select sources of income including active business income, small business deduction, employees vs. contractors, personal services businesses and investment income
- remuneration issues including salary vs. dividends, bonuses payable and income splitting with family members
- expenses and assets with personal and business elements - including meals and entertainment, automobiles, taxable benefits
- shareholder benefits and loans issues - including debit balances
- timely and topical practical matters
- newsy and notable information, recent developments
- challenging ethical situations encountered in a tax practice

Ethics Content

This seminar contains 0.75 hours of ethics content.

Seminar Leader

Denise Lammi, CPA, CA

Nov 28	9am-5pm	Hyatt Regency, Vancouver	[T83160A_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

TITLE STATUS

NEW

Income Tax – Partnerships

LEVEL Intermediate

Prerequisite

Familiarity with the existing tax rules in the ITA.

Overview

This seminar will provide an overview of the tax issues specific to partnerships. The requirements for forming a partnership will be discussed, as well as the process for terminating partnerships. The course will cover taxation of partnership income and the calculation of the ACB of a partner's interest in a partnership, the rules relating to the transfer of property to and from partnerships, and various tax planning options for partnerships. GST rules applicable to partnerships will also be discussed.

Who Should Attend

Professionals that deal with the taxation of partnerships on a regular basis.

Content

- creating legally effective partnerships
- tax treatment of income and losses
- calculation of ACB of partnership interests
- at-risk rules and their impact on income, losses and ACB
- transferring property to partnerships
- dissolving partnerships
- GST and partnerships
- planning opportunities using partnerships

Seminar Leader

Dave Rickards, CPA, CA

Dec 07	9am-5pm	Sutton Place, Vancouver	[T83002A_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

TITLE STATUS

UPDATED

Income Tax – Portfolio Investments

(formerly Income Taxation of Portfolio Investments)

LEVEL Intermediate

Prerequisite

Familiarity with the existing tax rules in the ITA.

Overview

Accountants are continually challenged by the creativity in the design and marketing of investment products and strategies. With the introduction of new products, questions often arise regarding the taxation of the income component. This half-day seminar will explain the application of income taxation to various investment products to assist in the preparation of personal and corporate income tax filings, the analysis of owning portfolio investments personally vs. corporately, and introduce the participant to after tax comparisons of alternative investment strategies.

In addition, with the 2018 Federal Budget introducing details on the taxation of corporate owned passive investments, the seminar will look at the proposals in detail, including a review of the impact on the ability of a corporation to claim the small business deduction and the two pools of refundable dividend tax on hand (RDTOH).

Who Should Attend

Practitioners, investors and other advisors who would like to further understand the passive income proposals and to enhance their knowledge of the taxation of income from portfolio investments.

Content

- a review of the passive income proposals from the 2018 Federal Budget
- investment income taxation – general rules, including:
  - Canadian source income from property
  - dividend tax credit
  - capital gains
  - foreign source income/tax credits/treaty exclusions
  - special treatment – charitable donations/other transfers
- deposit accounts: bank accounts; term deposits; GIC/GIA
- shares: common, preferred, flow through; reorganizations; puts and calls; and private company shares
- bonds: conventional (nominal); real return or inflation indexed; stripped; premium and discount bonds
- treasury bills: exchange traded funds (ETF); real estate investment trusts (REIT); specified investment flow through trusts (SIFT); limited partnership
- mutual funds: trust; corporate
- life insurance: accumulation policies; segregated funds
- registered funds: RRSP, RRIF, LIRA, LIF; TFSA; RESP; RDSP; and planning a retirement portfolio

Seminar Leader

Chris Ireland, B.Comm, CPA, CA, TEP

Dec 10	9am-12:30pm	Van Conv Ctr West, Vancouver	[T82090A_VA]
Fee $225	PD Passport Valid	1/2 Passport Day	3.5 CPD Hours

TITLE STATUS
UPDATED

Income Tax – Real Estate

(formerly Income Tax Issues Dealing with Real Estate)

LEVEL Intermediate

Prerequisite

Familiarity with the existing tax rules in the ITA.

Overview

This seminar identifies and reviews significant income taxation issues arising in various aspects of real estate activities, and includes practical, business-focused comments on dealing with them. Starting with a review of the structures available to undertake real estate transactions, the course follows with a detailed look at income tax issues arising on the acquisition, development, holding and then disposition of Canadian real estate. While a brief overview of GST, HST and provincial tax issues is undertaken, participants should be aware that due to its emphasis on income taxes, this course does not provide a detailed or complete discussion of the impact of indirect taxes on real estate.

Who Should Attend

Practitioners and members in industry who need to be aware of and/or work with income taxation issues arising in real estate transactions.

Individuals seeking in-depth coverage of real estate GST/HST topics should consider attending the seminar *GST/HST – Real Property*.

Content

The course content consists of a review of income tax issues involved in dealing with most common forms of real estate investment. Topics include

- alternative structures for investment in real estate
- issues arising before the acquisition of property
- acquisition and holding of real property
- development issues
- holding properties (including rental and Capital Cost Allowance)
- dispositions of properties
- corporate reorganization rules and real estate
- introduction to the concepts of indirect taxes (i.e. GST and HST) affecting real estate transactions
- provincial matters

Seminar Leader

Hugh Woolley, CPA, CA

Nov 05	9am-5pm	Hyatt Regency, Vancouver	[T83180D_VA]
Nov 29	9am-5pm	Victoria Conf Ctr, Victoria	[T83180E_VI]
Dec 14	9am-5pm	Van Conv Ctr West, Vancouver	[T83180F_VA]
Feb 20	9am-5pm	Hyatt Regency, Vancouver	[T83180G_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

TITLE STATUS
UPDATED
AVAILABLE OPTION
WEB SESSION

Income Tax – Starting a Business

(formerly Tax Issues in Starting a Business)

LEVEL Introductory

Prerequisite

None.

Overview

This seminar focuses on the many tax issues that arise – both compliance and planning related – when starting a business. This seminar is primarily focused on private companies. It does not touch on provincial-specific regulations or non-tax issues that are relevant to private companies (workers compensation rules, specific registration requirements, etc). Common traps and planning opportunities are discussed.

Who Should Attend

General practitioners who are involved in advising clients that are starting new businesses. Particular focus will be placed on fairly straightforward private company situations.

Content

- proprietorships, partnerships, and corporations
- structuring for tax efficiency
- structuring for investors
- structuring decisions to preserve access to losses
- planning opportunities
- employee issues

Seminar Leader

Mike Stubbing, CPA, CGA, CFP, TEP

Nov 23	9am-12:30pm	Van Conv Ctr West, Vancouver	[T82211A_VA]
Fee $225	PD Passport Valid	1/2 Passport Day	3.5 CPD Hours

TITLE STATUS
UPDATED

Income Tax – Update 2018

LEVEL Intermediate

Prerequisite

Familiarity with the existing tax rules in the ITA and experience in tax planning and compliance.

Overview

Providing a detailed summary of tax law changes in the past year, this seminar examines current changes and relevant issues in taxation that affect individuals and most businesses in the private sector. Topics include: tax rate changes and integration; new rules dealing with the taxation of private companies, passive investment income, dividend sprinkling, small business deduction; Federal Budget 2018; taxation of employment income and benefits; business income and deductions; capital transactions and shareholder issues; partnerships, trusts, charities and NFPOs/deferred income plans; international issues; CRA administrative matters; and provincial/territorial update. This seminar will benefit practitioners or members in tax in industry who need current information to advise clients, deal with the CRA, and update their existing knowledge of income tax issues.

Seminar Leaders to be drawn from

Mike Coburn, CPA, CA	Dwayne Dueck, CPA, CA
David Gautier, CPA, CA	Tom Grozier, CPA, CA
Ed Kroft, Q.C., CPA (Hon.)	Ken Laloge, CPA, CA
Elvin Law, CPA, CGA	Richard Myers, CPA, CA
Mark Ostry, CPA, CGA	Mary Power, CPA, CA
Brian Sanders, CPA, CA	Andrew Taylor, CPA, CA

Oct 16	9am-5pm	Hyatt Regency, Vancouver	[T83000A_VA]
Oct 18	9am-5pm	Northern Grand, Fort St. John	[T83000B_FS]
Oct 19	9am-5pm	Marriott Inner Harbour, Victoria	[T83000C_VI]
Oct 25	9am-5pm	Sheraton Guildford, Surrey	[T83000D_SU]
Oct 25	9am-5pm	Best Western, Terrace	[T83000E_TE]
Oct 25	9am-5pm	Four Seasons, Vancouver	[T83000F_VA]
Oct 30	9am-5pm	Exeutive Plaza, Coquitlam	[T83000G_CO]
Nov 01	9am-5pm	Ramada Hotel, Kelowna	[T83000H_KE]
Nov 01	9am-5pm	Quality Bayside, Parksville	[T83000I_PA]
Nov 02	9am-5pm	Sutton Place, Vancouver	[T83000J_VA]
Nov 05	9am-5pm	Executive Airport, Richmond	[T83000K_RI]
Nov 06	9am-5pm	Executive Hotel, Burnaby	[T83000L_BU]
Nov 13	9am-5pm	Hyatt Regency, Vancouver	[T83000M_VA]
Nov 13	9am-5pm	Marriott Inner Harbour, Victoria	[T83000N_VI]
Nov 14	9am-5pm	Quality Hotel, Abbotsford	[T83000O_AB]
Nov 19	9am-5pm	Best Western, Courtenay	[T83000P_CR]
Nov 19	9am-5pm	Ramada Hotel, Prince George	[T83000Q_PG]
Nov 20	9am-5pm	Best Western, Nanaimo	[T83000R_NA]
Nov 21	9am-5pm	Coast Hotel, Kamloops	[T83000S_KA]
Nov 21	9am-5pm	Van Conv Ctr West, Vancouver	[T83000T_VA]
Nov 24	9am-5pm	Van Conv Ctr West, Vancouver	[T83000U_VA]
Nov 28	9am-5pm	Hyatt Regency, Vancouver	[T83000V_VA]
Nov 30	9am-5pm	Sheraton Guildford, Surrey	[T83000W_SU]
Nov 30	9am-5pm	Hyatt Regency, Vancouver	[T83000X_VA]
Dec 04	9am-5pm	Hyatt Regency Vancouver	[T83001A_VA]
Dec 10	9am-5pm	Coast Capri, Kelowna	[T83001B_KE]
Dec 10	9am-5pm	Van Conv Ctr West, Vancouver	[T83001C_VA]
Dec 14	9am-5pm	Van Conv Ctr West, Vancouver	[T83001D_VA]
Dec 14	9am-5pm	Sheraton Guildford, Surrey	[T83001E_SU]
Dec 15	9am-5pm	Sutton Place, Vancouver	[T83001F_VA]
Jan 14	9am-5pm	Hyatt Regency, Vancouver	[T83001G_VA]
Jan 22	9am-5pm	Marriott Inner Harbour, Victoria	[T83001H_VI]
Jan 25	9am-5pm	Four Seasons, Vancouver	[T83001I_VA]
Feb 05	9am-5pm	Four Seasons, Vancouver	[T83001J_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

TITLE STATUS
UPDATED

Personal Tax – Tax Returns, Compliance, and Planning

(formerly Tax Returns: Personal)

LEVEL Introductory

Prerequisite

Some experience with personal tax preparation would be beneficial, but is not essential.

Overview

This full-day seminar provides participants with a broad overview of income tax issues which can impact taxpayers filing their personal tax returns. It provides a comprehensive review of income tax compliance and planning issues relevant to the preparation of Canadian personal income tax returns. Participants will gain an overall understanding of tax compliance issues, enhancing their ability to prepare complete and accurate tax returns, and to identify and address planning opportunities which arise in the preparation of personal income tax returns. The seminar materials provide greater depth of discussion, particularly in more complex areas or areas less frequently encountered in practice, and are intended as an ongoing reference source for participants.

Who Should Attend

Professionals seeking to build on their foundational knowledge of personal tax, or requiring a refresher and update on matters encountered in personal tax return preparation.

Content

- liability for tax
- employment income
- retirement income
- income from property
- income from business
- capital gains and losses
- other income and deductions
- personal tax credits
- computation of tax
- administration and disclosure
- provincial issues

Seminar Leader to be drawn from

Richard Myers, CPA, CA
Mark Ostry, CPA, CGA

Nov 14	9am-5pm	Delta Ocean Pointe, Victoria	[T83260A_VI]
Nov 29	9am-5pm	Sutton Place, Vancouver	[T83260B_VA]
Feb 08	9am-5pm	Hyatt Regency, Vancouver	[T83260C_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

TITLE STATUS UPDATED | AVAILABLE OPTION WEB SESSION

Probate Fee Avoidance Planning

LEVEL Intermediate

Prerequisite

None

Overview

Even though British Columbia probate fees are relatively low, their existence seems to motivate clients to develop complex estate plans in order to avoid them. The seminar will review the fundamentals of when and why probate is required and what property is subject to the process. The seminar will also examine the various strategies that can be employed to avoid probate fees. Each probate fee avoidance strategy will be discussed in the context of achieving other common estate planning goals, so that the participants will learn how the individual strategies compliment or hinder the achievement of those other goals.

Who Should Attend

Those who advise clients or are asked by clients about probate and probate fee avoidance.

Content

- what is probate and when is it required
- what property is subject to probate fees
- probate fee rates
- planning opportunities to avoid probate fees
  - designation of beneficiaries
  - joint tenancy
  - inter vivos gifting
  - use of inter vivos trusts
  - multiple wills

Comments from Past Attendees

"Good overview of subject matter." "Great seminar at just the right level." "Very practical." "Well planned lecture." "A good summary of most issues impacting probate fees." "The leader discussed practical applications, pros and cons, current updates, and handled questions well."

Seminar Leader

Genevieve Taylor, LL.B.

Nov 30	8am-10am	Sutton Place, Vancouver	[T81070A_VA]
Fee $130	PD Passport Valid	1/3 Passport Day	2 CPD Hours

TITLE STATUS UPDATED

Review of Corporate Tax Planning

(formerly Income Tax Planning Refresher for Corporate Tax)

LEVEL Intermediate

Prerequisite

Corporate Tax - Tax Return Updates, Compliance, and Planning, or equivalent working experience with the preparation of corporate tax returns and some tax planning experience.

Overview

This two-day refresher in corporate tax is designed for those who desire to update and refresh their knowledge in both technical and tax planning issues for corporations. Although the corporation taxation for public and private corporations is reviewed, the primary focus is on the taxation of private companies. The detailed reference materials covering a broad range of corporate income tax topics, will be an invaluable reference in the future. In addition to the presentation of the material by the seminar leader, participants will work through case studies covering a wide range of corporate tax issues, collaborate with their peers and have an opportunity to share issues that have been impacting their clients.

Who Should Attend

Those involved in corporate tax matters for private corporations that desire to expand or refresh their knowledge of corporate tax.

Content

- organization of the Tax Act as it relates to corporations
- determination of residency
- various income items and deductions not commonly seen
- calculation of corporate taxes
- common definitions under the Income Tax Act that impact a corporate taxpayer, including related parties, affiliated parties, and associated corporations
- various sources of income, including active business income, investment income, specified investment business and personal service businesses.
- commonly used corporate reorganization provisions: the use of the Section 85 rollover; Section 86 capital reorganization; Section 87 amalgamation; Section 88 wind-up
- Section 84.1 and Section 55(2) anti-avoidance provisions
- corporate attribution
- loss utilization
- owner manager remuneration planning
- estate planning
- issues for buy-sell agreements and purchase and sale of business
- acquisition of control
- debt forgiveness

Seminar Leaders to be drawn from

Tom Grozier, CPA, CA
Randall Hay, CPA, CA, MBA, FEA
Mary Power, CPA, CA
Andrew Taylor, CPA, CA

Nov 23-24	9am-5pm	Van Conv Ctr West, Vancouver	[T84010C_VA]
Nov 26-27	9am-5pm	Ramada Hotel, Kelowna	[T84010D_KE]
Dec 04-05	9am-5pm	Marriott Inner Harbour, Victoria	[T84010E_VI]
Mar 11-12	9am-5pm	Four Seasons, Vancouver	[T84010F_VA]
Fee $785	PD Passport Valid	2 Passport Days	14 CPD Hours

TITLE STATUS
UPDATED

Review of Personal Tax Planning

(formerly Income Tax Planning Refresher for Personal Tax)

LEVEL Intermediate

Prerequisite

Personal Tax - Tax Return Updates, Compliance, and Planning, or equivalent working experience in preparing personal tax returns and planning for clients.

Overview

This two-day refresher 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. Although the taxation for trust and partnerships is reviewed, the primary focus is on the taxation of individuals. The detailed reference materials covering a broad range of income tax topics, will be an invaluable reference in the future. An overview of the research materials available for use in answering tax related issues will be provided. In addition to the presentation of the material by the seminar leader, participants will work through case studies covering a wide range of personal tax issues, collaborate with their peers and have an opportunity to share issues that have been impacting their clients.

Who Should Attend

Those involved in personal tax matters who wish to expand or refresh their knowledge in the area of personal tax.

Content

- how to research a tax issue
- determination of residency
- liability for taxes in Canada
- administrative issues
- employment income
- benefits and related deductions
- calculations of the various sources of investments income
- taxation of capital gains
- capital losses and the impact of the stop loss rules
- allowable business investment losses
- attributions rules
- registered retirement pension plans
- RRSPs
- individual pension plans
- deferred plans such as TFSA, RESP and RDSP
- rental and farm income
- treatment of shareholder loans
- various deductions from net income such as the capital gains exemption
- calculation of taxes payable, including discussions on tax credits
- taxation of partnerships
- death of a taxpayer
- taxation of family trusts

Seminar Leader

Mark Ostry, CPA, CGA

Jan 17-18	9am-5pm	Ramada Hotel, Kelowna	[T84020B_KE]
Jan 23-24	9am-5pm	Hyatt Regency, Vancouver	[T84020C_VA]
Feb 06-07	9am-5pm	Sheraton Guildford, Surrey	[T84020D_SU]
Fee $785	PD Passport Valid	2 Passport Days	14 CPD Hours

TITLE STATUS
UPDATED

RIP – Estate and Testamentary Trust Returns

LEVEL Intermediate

Prerequisite

Knowledge of personal tax, and some experience preparing T3 trust tax returns is recommended.

Overview

This seminar provides a review of the issues faced when preparing trust filings for deceased taxpayers. The focus is return preparation and related planning, including: review of relevant tax issues, engagement management, up-to-date source of relevant tax research, and reviewing and understanding CRA assessing practices. While the seminar will touch on some estate planning issues, these will generally focus on matters which can be addressed in the course of preparing these returns.

The seminar is divided between a review of technical tax issues related to such returns, and a series of practice case studies to illustrate the concepts and allow participants to apply their knowledge to practical filing situations commonly encountered in practice.

Who Should Attend

Practitioners who wish to expand their personal tax skills to encompass preparing estate and testamentary trust income tax returns. Those looking for more information on terminal filing preparation should take the seminar *RIP – Terminal Filing.*

Content

- engagement management
- tax compliance in respect of the establishment of a testamentary trust
- identification of issues regarding the implications of the death of a taxpayer
- compliance related to the graduate rate estate of the deceased
- compliance matters with respect to distributions from the estate and the establishment of post-distribution testamentary trusts
- issue identification with respect to life-interest trusts and the compliance matters relating thereto
- estate accounting
- identification of GST/HST matters
- the practical application of the above through the preparation and discussion of case studies

Seminar Leaders

Hayley Maschek
Pam Prior, CPA, CA, TEP

Dec 04	9am-5pm	Hyatt Regency, Vancouver	[T83211A_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

TITLE STATUS
UPDATED

RIP – Estate Planning

(formerly RIP: Estate Planning to Minimize Tax Leakage)

LEVEL Advanced

Prerequisite

Experience in the area of domestic estate planning and a good understanding of the testamentary tax rules. Suggested prerequisite seminars are *RIP – Estate and Testamentary Trust Returns* and *RIP – Terminal Filing.*

Overview

This seminar will provide a detailed review of important estate planning matters for practitioners who deal with owner-manager or high net worth clients. This includes enhanced estate planning skills for the non-specialist practitioner, an introduction of important tax and estate planning concepts, and useful tips and an up-to-date reference source. Participants will develop a working understanding of how to initiate and undertake effective estate planning for clients. An important area of the course is to maintain flexibility in the estate plan while managing estate planning risk.

Who Should Attend

Practitioners who want to identify and address estate planning needs for the owner-manager or high net worth individual.

Content

- planning for deemed disposition at death
- planning and using trusts
- post-mortem planning
- the use of life insurance in planning
- a U.S. estate tax review
- the preparation and discussion practical examples through a case study

Seminar Leaders to be drawn from

Hayley Maschek
Pam Prior, CPA, CA, TEP
Andrew Taylor, CPA, CA

Nov 07	9am-5pm	Marriott Inner Harbour, Victoria	[T83110A_VI]
Dec 05	9am-5pm	Hyatt Regency, Vancouver	[T83110B_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

TITLE STATUS
UPDATED

RIP – Terminal Filing

(formerly RIP: Tax Compliance Matters related to Terminal Filing Preparations)

LEVEL Intermediate

Prerequisite

Knowledge of personal tax, and experience preparing T1 personal tax returns is recommended.

Overview

This full-day seminar will provide a detailed technical review of the numerous issues faced when preparing terminal (year-of-death) filings. The focus is return preparation and related planning as it relates to terminal filings. The seminar will include a review of relevant tax issues, engagement management, up-to-date sources of relevant tax research, and an overview of CRA assessing practices.

Who Should Attend

Practitioners who complete individual terminal tax filings and who are interested in understanding related planning strategies.

Content

- engagement management
- tax filings on death
- identification and understanding of detailed compliance issues
- compliance related to RRSP and deferred income plan rules
- general compliance relating to terminal filings
- identification of GST/HST matters
- the practical application of the above through the preparation and discussion of case studies

Seminar Leaders

Hayley Maschek
Pam Prior, CPA, CA, TEP

Dec 03	9am-5pm	Hyatt Regency, Vancouver	[T83070A_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

TITLE STATUS
UPDATED

Tax for Controllers

LEVEL Introductory

Prerequisite

None.

Overview

Small, growing, and mid-sized companies face a broad array of income tax, GST/HST and related compliance issues. The penalties or tax costs of failing to meet these compliance requirements can be severe. This course will help controllers of private companies stay current on a broad array of income tax, GST/HST and related compliance issues. It covers a range of topics at a general level with specific examples, cases and practical problems. Detailed industry specific material is not included in this course.

Who Should Attend

Anyone whose responsibilities include income tax, GST/HST, and related compliance and reporting issues, or practitioners who provide advice in these areas. Although the focus of the course is privately held companies, many of the topics covered could also be applicable to public companies.

Content

- basic income tax and GST principles
- human resources - payroll and withholdings,
- purchasing issues: limitations on deductions; GST/HST – get the ITC; purchases from non-residents
- domestic sales issues: GST/HST – registration, reporting periods, place of supply; bad debts
- sales to non-residents: export sales - GST/HST; Canada- U.S. Tax Treaty
- automobiles: issues in respect of employees who require an automobile to perform their duties
- capital assets and real property: capital vs operating expense; purchase issues; CCA; GST/HST issues; change of use; dispositions.
- financing issues: expenses in respect to equity; interest and debt; lease vs. buy
- key items for CCPC income tax: entitlement to the small business deduction; issue identification for specified corporate income and specified partnership income; taxable capital; income tax penalties
- related group issues: the key income tax relationships: related, associated, and affiliated; the key GST/HST relationships: closely connected and associated; shareholder agreements and related issues; domestic transfer pricing.
- alternative structures; corporations; partnerships; joint ventures; trusts
- other requirements; GST returns; information returns; contractor reporting; non-resident reporting; partnership returns; collections and offsets

Ethics Content

This seminar contains 0.5 hours of ethics content.

Seminar Leader

Sandy Stedman, CPA, CA

Oct 23-24	9am-5pm	Coast Capri, Kelowna	[T84030B_KE]
Nov 14-15	9am-5pm	Marriott Inner Harbour, Victoria	[T84030C_VI]
Dec 05-06	9am-5pm	Sutton Place, Vancouver	[T84030D_VA]
Fee $785	PD Passport Valid	2 Passport Days	14 CPD Hours

TITLE STATUS
UPDATED

Taxation of Domestic Trusts – Fundamentals

(formerly Taxation of Domestic Trusts: Basic)

LEVEL Intermediate

Prerequisite

Familiarity with the existing tax rules in the ITA.

Overview

This course is a good entry point for practitioners who have a limited understanding of family trusts or do not work with trusts on a routine basis and desire a refresher on trust basics. It will provide an overview of trust relationships, how to complete basic returns for trusts and their beneficiaries, and how to identify and communicate basic tax planning benefits and opportunities that involve family trusts. This course is highly relevant to any practitioner who has a client with a family trust in its structure. It offers a comprehensive analysis of the amendments to the Income Tax Act proposed by the Department of Finance in December 2017. Participants will learn how to identify potential issues with any current client structures in place and future client structures being considered, and will develop better knowledge of the rights and duties of settlors, trustees and beneficiaries. Both the inter vivos and testamentary trust context will be discussed.

Who Should Attend

Practitioners who wish to gain an understanding of trust taxation, or wish to refresh their knowledge and stay abreast of current issues to better advise their clients.

Content

- recognizing the need for a trust structure
- overview of trust law
- design of a trust
- types of trusts
- taxation of trusts
- taxation of beneficiaries
- trusts and estates
- planning opportunities
- administration

Seminar Leaders

Shane Brown, LL.B.
Shawn Tryon, LL.B.

Nov 08	9am-5pm	Hyatt Regency, Vancouver	[T83140A_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

TITLE STATUS: UPDATED

Taxation of Domestic Trusts – Advanced

LEVEL Advanced

Prerequisite

Taxation of Domestic Trusts – Fundamentals or equivalent knowledge.

Overview

This course will cover tax issues surrounding family trusts and complex tax planning opportunities. There is a focus on tax planning opportunities and tax traps, including planning opportunities. Issues are discussed in both the inter vivos and testamentary trust context. This course is highly relevant to any practitioner who has a client with a family trust in its structure, as it offers a comprehensive analysis of the amendments to the Income Tax Act proposed by the Department of Finance in December 2017. Participants will learn how to identify potential issues with any current client structures in place and future client structures being considered. Furthermore, participants will be able to, in many cases, propose solutions to any problems they do identify with their clients' structures.

Who Should Attend

Practitioners who have taken the fundamentals course and wish to have a greater understanding of trust planning opportunities.

Content

- non-tax reasons for a trust
- tax traps
- tax planning
- estate planning
- determining trust income
- testamentary spousal trusts
- 21-year rule
- post-mortem tax planning
- audit-proofing your client

Seminar Leaders

Shane Brown, LL.B.
Shawn Tryon, LL.B.

Nov 23	9am-5pm	Van Conv Ctr West, Vancouver	[T83230A_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

TITLE STATUS: UPDATED
AVAILABLE OPTION: WEB SESSION

To Be or Not to Be: The Executor – Powers, Obligations and Liabilities

LEVEL Introductory to Intermediate

Prerequisite

None

Overview

Acting as an Executor can be financially rewarding for the member or the member's client who agrees to act. However, the job can be onerous and fraught with complexity, acrimony and personal risk. The goal of this seminar is to provide you with sufficient knowledge so that you can make an informed decision or assist your clients in making informed decisions as to whether you or your clients should take on the Executor's role. You will learn and examine the stages of estate administration from date of death through to distribution, final accounting and release.

Who Should Attend

Members who are thinking of taking on the role of Executor, or who have clients who are thinking of acting as Executors.

Content

- the probate process
- dealing with creditors and claims
- safeguarding estate assets
- managing beneficiary expectations
- compensation
- accounting and release

Comments from Past Attendees

"Thorough and informative. Enjoyed the course!" "Excellent speakers – both very engaging." "Excellent overview of the topic if you have never acted as an executor." "Well presented and useful reference material."

Seminar Leaders

Christine Muckle, JD
Genevieve Taylor, LL.B.

Feb 20	8am-10am	Sutton Place, Vancouver	[T81110A_VA]
Fee $130	PD Passport Valid	1/3 Passport Day	2 CPD Hours

TITLE STATUS
UPDATED

US Corporate Tax – Fundamentals

(formerly US Taxation - Introduction to US Corporate Taxation)

LEVEL Introductory

Prerequisite

Some understand of Canadian tax principles will be beneficial.

Overview

Increasingly Canadian entrepreneurs are expanding their businesses into the United States. At the same time, our general practitioners are being asked to provide advice on taxation matters with may affect such Canadian enterprises and/or their U.S affiliates. The course will provide a general overview of the U.S. corporate taxation system, and discussion of how the Canada-United States Income Tax Convention (the "Treaty") provides certain protections to the Canadian enterprises. There will also be some discussion on how Canada will tax the Canadian enterprises on the repatriation of U.S. profits.

The course will provide participants with relevant knowledge on some of the most commonly asked questions by Canadian entrepreneurs when they expand their businesses into the United States, such as: what are the basic taxation issues and filing requirements associated with different business structures?; what do common U.S. corporate tax filings look like?; what are the IRS requirements associated with cross-border payments?; and what are some of the most common U.S. state and local tax issues?.

Who Should Attend

Practitioners with limited prior exposure to U.S. taxation, who want to better understand U.S. corporation taxation issues and filing requirements, or who wish to provide basic taxation advice to clients expanding their businesses into the United States

The course is not intended for international or U.S. tax specialists who will be required to prepared complex U.S. corporate tax returns or provide in-depth advice to clients on U.S./international tax matters.

Content

- overview to the relevant law: U.S. Internal Revenue Code; Canada-United States Income Tax Convention; Canadian Income Tax Act (limited)
- overview of treaty protection: Article V Permanent Establishment; Article VII Business Profits; withholding rates modification
- forms of doing business in the U.S.
- overview of the U.S. corporate tax return: Form 1120; Form 1120-F; Treaty Based Form 1120-F; filing deadlines; estimated tax requirements; non-compliant penalties
- case study: sample Treaty Based Form 1120-F
- computation of taxable income: basic revenue sourcing rules; basic revenue recognition procedures; common expenditures; basic depreciation calculations
- case study: sample Form 1120
- transactions between U.S. subsidiaries and Canadian shareholders
- overview of state and local taxation (limited scope)

Seminar Leader

Terence Wong, CPA, CA, CPA (Illinois)

Nov 22 | 9am-5pm | Van Conv Ctr West, Vancouver | [T83380A_VA]
Fee $450 | PD Passport Valid | 1 Passport Day | 7 CPD Hours

TITLE STATUS
NEW
AVAILABLE OPTION
WEB SESSION

US Tax – Cross Border Financing and US Tax Reform: Tips and Traps

LEVEL Intermediate

Prerequisite

Working knowledge of Canadian tax concepts and exposure to cross border taxation matters.

Overview

This session will cover certain key fundamental Canadian and US tax principles applicable to cross-border financing, the impact of US Tax Reform, and tips and traps of cross-border inbound and outbound financing arrangements to/from Canada and the US.

Who Should Attend

Industry professionals with working knowledge of tax who deal with, or who would like to understand, cross-border tax issues. Practitioners who would like a refresher on certain inbound and outbound cross-border tax rules and US tax principles will also find this seminar beneficial.

Content

- when do the thin capitalization rules apply on inbound loans?
- what are the 15(2) implications on shareholder and side-stream loans? What exceptions are available and what are common strategies to manage a 15(2) exposure?
- when do the upstream loan rules apply? What exceptions to an income inclusion are available and what are common strategies to manage a 90(6) exposure?
- what are the tax implications of downstream loans made to foreign affiliates? When would the foreign affiliate dumping rules apply and how can this be managed?
- what are some common types of structures for providing financing to a foreign affiliate (including, financing a US foreign affiliate) from Canada?
- what are the key US federal income tax considerations to consider regarding related party cross-border debt? (e.g., interest deduction limitations, re-characterization of debt as equity, withholding tax and treaty considerations, etc.)
- what is the US Tax Reform impact on cross border financing structures?

Seminar Leaders

Jodi Moss, CPA, CA
Wynn Vo, CPA, CA

Nov 28 | 8am-10am | Four Seasons, Vancouver | [T81002A_VA]
Fee $130 | PD Passport Valid | 1/3 Passport Day | 2 CPD Hours

TITLE STATUS

UPDATED

US Tax – Real Estate & Personal Investments

(formerly US Real Estate – Personal Investment – Canadian & US Tax Implications)

LEVEL Intermediate to Advanced

Prerequisite

Familiarity with the Canadian ITA.

Overview

This course will provide an overview of the Canadian and U.S. tax issues that arise on the acquisition, ownership, and disposition of U.S. real estate by individuals resident in Canada. It will cover Canadian and U.S. (federal and state) tax issues that should be considered when individuals invest in U.S. real estate – whether for personal use, or for rental, or for both rental and personal use. The applicable tax filing requirements will be discussed, along with elections that need to be filed. The course also reviews the compliance requirements and the current planning opportunities available to minimize Canadian and U.S. tax with respect to ownership of U.S. real estate. The implications on death will be covered as well as the implications of gifting U.S. real estate.

Who Should Attend

Individuals interested in investing in U.S. real estate, advisors to individuals investing in U.S. real estate, owners of U.S. real estate, executors of estates with U.S. real estate, and trustees of trusts with U.S. real estate.

Content

- various structures for ownership (e.g., individual, partnership, trust, LLC, etc)
- relevant Canadian and U.S. tax rules
- Canadian and U.S. filing requirements
- U.S. state taxation
- disposition of U.S. real estate
- U.S. estate and gift tax
- tax rates
- various U.S. tax forms and elections

Numerical examples are included in the materials. Personal experience and discussion is part of the course.

Seminar Leaders

Ryan Gill, CPA, CA, CPA (New Hampshire)
Benita Loughlin, CPA, CA

Nov 29	9am-5pm	Four Seasons, Vancouver	[T83322A_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

TITLE STATUS

NEW

US Tax Reform and Canadian Business

LEVEL Introductory

Prerequisite

None

Overview

The seminar will review issues faced by Canadian-based businesses doing business in the United States due to the legislation popularly known as the Tax Cuts and Jobs Act.

Who Should Attend

CPAs in public practice and in industry who do not practice US corporate tax but want to improve their awareness of current trends, issues, and uncertainties faced by Canadian-based businesses doing business in the United States.

Content

- key components of the 2017 600-page US tax reform legislation popularly known as the Tax Cuts and Jobs Act
- case studies exploring how the new tax rules apply to Canadian corporations, Canadian-controlled subsidiaries, and certain US-controlled Canadian corporations

Seminar Leader

Kevin Duxbury, CPA, CA

Nov 16	8am-10am	Sutton Place, Vancouver	[T81003A_VA]
Fee $130	PD Passport Valid	1/3 Passport Day	2 CPD Hours

Wealth Management

NOTABLE FORMAT OPTIONAL
HANDS-ON LAPTOP

Enough Bull: How to Retire Well Without the Stock Market

LEVEL Introductory

Prerequisite
None

Special Note
This is a hands-on workshop. Though not mandatory, you are encouraged to bring a laptop to work along during the program on the spreadsheets including the "CPP Elect Age Calculator," the "CPP Return Calculator," the "Investment Option Cost Analyzer," "RRSP vs Retaining Profits in Corporation" and the "Money Maximizer" to maximize your family's after-tax cash flow.

Overview
The stock market crash of 2008 has proven one thing: traditional retirement planning advice is way too risky. Trusting the stock market is like gambling with a family's future. But how does one plan for retirement without the possibility of losing up to 50 per cent of their investment value within a matter of months? The simple truth is that it is possible to retire financially well using guaranteed, safe fixed-income products like GICs that can never decline in value combined with government defined benefit pension plans including CPP and OAS. This course will detail the non-traditional view to money management that many investment advisors don't want to talk about. Participants will receive a copy of David Trahair's book *Enough Bull*.

Who Should Attend
Those interested in helping their friends, family and clients to retire well without having to take risks.

Content
- stock market versus GIC returns
- the laddered GIC strategy - explore a strategy of rolling over shorter term GICs to five-year GICs to maximize your retirement savings with zero risk
- CPP - when to elect to start receiving CPP (from age 60 to 70); we'll also analyze whether the CPP is a good investment
- can anything beat an RRSP - compare equity investing inside RRSPs vs outside in a regular investment account, TFSAs, rental properties, paying off debt, and retaining earnings in a corporation
- guide to investing - learn about the main investing options: mutual funds, a full-service broker, a discount broker and robo-advisors; calculate how much you'll pay in fees under each of the options
- the "Tax Turbo-Charged RRSP" strategy - work through a spreadsheet to compare the traditional advice to invest in RRSPs early, to waiting until later in life, when all debt is gone

Seminar Leader
David Trahair, CPA, CA

Nov 09	9am-5pm	Hyatt Regency, Vancouver	[A83072A_VA]
Nov 23	9am-5pm	Sheraton Guildford, Surrey	[A83072B_SU]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

Essential Documents of any Successful Estate Plan

LEVEL Introductory

Prerequisite

None.

Overview

Learn the "building block" legal documents that are crucial for every estate plan. While many understand a Will is needed, for most clients this is just the beginning. A well-thought-out and comprehensive estate plan may also consider trusts, marriage/cohabitation agreements, co-ownership agreements, shareholder agreements, and beneficiary designations, to name a few. In addition, incapacity planning documents such as powers of attorney and Representation Agreements are equally important.

We will explore these documents (and more), and just how they can be used to create a successful estate plan.

Who Should Attend

Those looking for a basic overview of estate planning documents and which documents will best serve each client's particular needs.

Content

A review of the documents that are needed for a comprehensive estate plan, both on death and incapacity, such as a Will, alter ego trust, joint spousal trust, cohabitation/marriage agreement, Representation Agreement, power of attorney, and more.

Seminar Leaders

Andrea Frisby, TEP
Christine Muckle, JD

Feb 27	8am-10am	Sutton Place, Vancouver	[A81014A_VA]
Fee $130	PD Passport Valid	1/3 Passport Day	2 CPD Hours

Money, Love and the Law

(formerly Money, Love and Mayhem)

LEVEL Introductory

Prerequisite

None.

Overview

In a new social reality our clients are not just divorcing but re-partnering again – often with the same disastrous financial (and emotional) results! The first line of defense in any scenario where the downside risk is a 50% reduction in wealth is to manage that risk. And yet, few couples will engage in the discussion and legal options available to avoid potentially disastrous outcomes. As aging couples re-partner, common misunderstandings are compounded by unequal net worth, children, step children, and estate planning considerations. Assumptions that today's couples are going to stay together forever is simply not supported in reality. Spousal relationships, co-habitation and marriage need to be examined in light of their financial and legal implications and not just within the romantic models we idealize and hope for.

Who Should Attend

Anyone who has clients who have changed marital status, or are contemplating partnering, or are in the midst of a change themselves.

Content

- new legal constructs under the Family Law Act (taught by a family lawyer)
- psychological factors influencing partnering behaviour
- structures for communication
- conflict resolution continuum and options available
- concepts of romantic relationships, social assumptions and misunderstandings
- the role of the financial professional in overseeing and supporting healthy and protective behaviours with their re-partnering clients

Seminar Leader

Tracy Theemes, MA, CFP, FCSI, FDS

Dec 13	1:30pm-5pm	Van Conv Ctr West, Vancouver	[A82301A_VA]
Fee $225	PD Passport Valid	1/2 Passport Day	3.5 CPD Hours

TITLE STATUS

NEW

Retirement Planning for Financial Professionals

LEVEL Introductory

Prerequisite

None.

Overview

New economic realities, changing paradigms of retirement, and professional blind spots can mean that personal financial planning can be surprisingly challenging for accountants. In this session we will discuss the changing conditions of older adulthood and new ways to approach financial planning. We will also address common mistakes in personal strategies and areas to be particularly mindful about. Detachment to financial outcomes can be hard when one is both advisor and client.

Learn how to play to your strengths and still be alert to you own misconceptions so your later years can be secure, joyful and prosperous.

Who Should Attend

Anyone who is counselling people who are retiring or contemplating this life stage personally

Content

- colloquial, conceptual understandings and historical paradigms of retirement
- new realities
- stages of retirement and their financial implications
- professional biases and overcoming personal blind spots in financial planning
- creating a plan that is relevant, current and achievable

Seminar Leader

Tracy Theemes, MA, CFP, FCSI, FDS

Nov 14	9am-12:30pm	Sutton Place, Vancouver	[A82302A_VA]
Fee $225	PD Passport Valid	1/2 Passport Day	3.5 CPD Hours

NOTABLE FORMAT

HANDS-ON

OPTIONAL

LAPTOP

Smoke and Mirrors: Financial Myths that will Ruin Your Retirement Dreams

LEVEL Introductory

Prerequisite

None.

Special Note

This is a hands-on workshop. Though not mandatory, you are encouraged to bring a laptop to work along during the program on spreadsheets including the "Retirement Optimizer" to calculate how much you'll need to retire, the "Personal Rate of Return Calculator" to see how well your investments have been doing and the "Car Lease vs Buy Analyzer" to help you optimize your car strategy. All spreadsheets are free with the course.

Overview

There is a lot of confusion when it comes to retirement planning. How much will a family need to retire comfortably? Are RRSPs the best answer? Can the stock market be trusted? The standard answers from the "experts" include: start an RRSP early and maximize your contributions, use the stock market and mutual funds for the best returns, put faith in a financial adviser. But what if those answers are wrong? The problem is that much of the common advice is from people with a conflict of interest. Many are simply trying to sell financial products that make them money - at the client's expense. This course is designed to cut through the sales pitches and get to the simple truths. Participants will receive a copy of David Trahair's book *Smoke and Mirrors*.

Who Should Attend

Anyone who is interested in what they need to do to retire well, as well as practitioners who need a refresher on advising clients on retirement planning.

Content

- if I had $1,000,000 I could retire - why less than a million might be sufficient
- RRSPs are the holy grail of retirement - explore an alternate strategy that is guaranteed, has no-risk, and eliminates fees
- don't worry about your investments, you'll be fine in the long run -.why you may not be making the eight to ten per cent a year they often talk about; what your adviser doesn't want you to know
- we have met the enemy, and he is the tax collector - why tax shelters may be sabotaging your personal finances when you think they are helping you reduce your taxes
- secure your financial future, buy life insurance - who really needs it, who doesn't, the perils of whole and universal life, how to get term life cheap; critical illness and long-term care insurance
- other subjects – mortgages; behavioural economics; car strategy

Seminar Leader

David Trahair, CPA, CA

Nov 22	9am-5pm	Van Conv Ctr West, Vancouver	[A83062A_VA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

NOTABLE FORMAT HANDS-ON | OPTIONAL LAPTOP

The Procrastinator's Guide to Retirement

LEVEL Introductory

Prerequisite

None.

Special Note

This is a hands-on workshop. Although not mandatory, you are encouraged to bring a laptop to work along during the program on spreadsheets including the "The Procrastinator's Number Cruncher," the "Estate Planning Record Keeper" and the "CPP Retirement Pension Calculator." All spreadsheets are free with the course.

Overview

Let's face it, planning and saving for retirement is not easy. We are told that the earlier we start the better, and that the "magic of compounding" will make our dreams come true. But for most people it's simply not possible. In our twenties through our forties, we are busy paying for our housing, our cars, our kids and all the other costs of living. Out of necessity many of us become procrastinators when it comes to saving for retirement. But there is hope. This course will take you step-by-step though planning and saving for retirement starting in your 50s and the best way to fund your retirement years. It is an easy-to-follow plan for retirement in ten years or less. Participants will receive a copy of David Trahair's book The *Procrastinator's Guide to Retirement.*

Who Should Attend

Anyone approaching retirement who are starting late and wants to ensure it is comfortable and stress-free.

Content

- tracking your spending - the key step to retirement planning that most people don't do; learn how to do it easily, automatically and for free.
- optimize your retirement savings and drawdown strategy - work with a free easy-to-use Excel spreadsheet to optimize the use of excess cash and maximize your retirement income; your pre- and post-retirement investment strategy; why is exposure to equities during the drawdown phase so dangerous?
- retirement funding options - your CPP and OAS; how to calculate how much you'll get; your home as a source of funds
- RRIF versus annuity - how they work and the advantages and disadvantages of each; a suggested strategy and current annuity rates
- old age healthcare planning - what the government covers and what it doesn't; long-term care facility options
- other – inheritance; your credit card strategy; car lease versus buying; divorce

Seminar Leader

David Trahair, CPA, CA

Nov 08	9am-5pm	Marriott Inner Harbour, Victoria	[A83203B_VI]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

TITLE STATUS NEW

The Psychology of Investing

LEVEL Introductory

Prerequisite

None.

Overview

For decades controversy has raged in the world of behaviour and finance. Historically it was assumed that we approach our investing decisions with rationality but recent research has proven that emotions and behavioural biases, both conscious and unconscious are more at work than ever imagined. In this engaging and dynamic workshop we will address the empirical findings on investor behaviour and dig deeper into the thought processes at work in our own investing and financial lives.

Who Should Attend

Those who are managing their own investment behaviour and/or that of others.

Content

- history and background of theoretical models
- two system theory of decision making
- four obstacles to rational decision making
- choice architecture
- cognitive and emotional biases in behavioural finance
- defining risk
- steps to overcoming bias to improve investment outcome and irrationality

Seminar Leader

Tracy Theemes, MA, CFP, FCSI, FDS

Feb 25	9am-12:30pm	Four Seasons, Vancouver	[A82306A_VA]
Fee $225	PD Passport Valid	1/2 Passport Day	3.5 CPD Hours

The Psychology of Money

LEVEL Introductory

Prerequisite

None

Overview

The idea that humans are rational and that their relationship with money is a clear line between logic and action has been soundly disputed by empirical research. Gender, socio-cultural conditioning, epigenetics, family system theory combined with the dynamics of a changing world converge to create psychological chaos in the world of financial planning and investment management. As professionals it is imperative that we have tools to understand the often conflicting behaviours of our clients, and ourselves! When it comes to money, nothing is really as it seems. Financial planning and traditional views of investment management need to be reviewed in a more sophisticated psychological context if we are to appropriately advise and protect our clients-and ourselves- against irrational and self-sabotaging financial decision making and behaviour.

This seminar will discuss gender and socio-cultural variables in financial planning and decision making, and enable participants to develop an architecture for decision-making processes. At the end of this seminar, participants should be able to recognize patterns and situations where conflicting objectives and behaviours may lead to unsuitable outcomes, have strategies of recognition and intervention that may assist in working with clients, and understand their own biases in working with clients and their finances.

Who Should Attend

Anyone who has money or counsels those who have money.

Content

- 10 principles of personal financial behaviour
- 5 wealth myths de-bunked
- 3 factors that affect our relationship with money
- the basic principles of behavioural finance and their consequences in the field of personal financial planning
- the adult developmental continuum and its role in planning

Seminar Leader

Tracy Theemes, MA, CFP, FCSI, FDS

Dec 04	9am-12:30pm	Sutton Place, Vancouver	[A82303A_VA]
Fee $225	PD Passport Valid	1/2 Passport Day	3.5 CPD Hours

NOTABLE FORMAT: HANDS-ON
OPTIONAL: LAPTOP

The Simplest Personal Finance Strategy Ever: Cash Cows, Pigs and Jackpots

LEVEL Introductory

Prerequisite

None

Special Note

This is a hands-on workshop. Though not mandatory, you are encouraged to bring a laptop to work along during the program on spreadsheets including the "Cash Cow Decision Maker" designed to allow you to play with alternatives to maximize your family's cash flow. You'll also get the "House Rent vs. Buy Analyzer" spreadsheet.

Overview

The previously accepted method of building wealth doesn't work anymore. The truth when it comes to personal finances is simple: People's quest to secure a comfortable retirement often ends up making them poor and others rich. The old way to get wealthy was to acquire assets like real estate, stocks and mutual funds using debt and then sit back and let time grow the net worth. But that strategy is deeply flawed and is going to send many people to the poor house. That's because it ignores the one basic principle that overrides any wealth-building strategy that anyone who is truly rich knows: What we should really be focused on is not getting rich, but plain old cash flow. Participants will receive David Trahair's book *Cash Cows, Pigs and Jackpots*.

Who Should Attend

Anyone interested in helping their clients focus on what really matters – not building wealth, but ensuring cash flow.

Content

- the Cash Cow strategy - how to employ this simple strategy in your own life; how to identify your greatest source(s) of cash and make sure they keep on giving; use the "Cash Cow Decision Maker" designed to allow you to play with alternatives to maximize your family's cash flow; converting your RRSPs to annuities vs RRIFs
- does money buy happiness - delve into the relationship; does a higher income make you happier; look at how changing your spending habits can improve your satisfaction level with your life
- buying a house or rental property - get assistance making one of the biggest decisions affecting cash flow in your life - home ownership - using the "House Rent versus Buy Analyzer" spreadsheet
- the condominium conundrum - a primer on buying a condo as a first home or rental property and the extreme risks that exist
- inflation - how the CPI index is measured, explanations of inflation, disinflation, deflation and the real monster - stagflation.
- CPP and OAS - a review of the rocky history of the CPPIB, the current CPP plan surplus, investment strategy and review of the proposed enhancement of the CPP

Seminar Leader

David Trahair, CPA, CA

Nov 21	9am-5pm	Coast Hotel, Kamloops	[A83082B_KA]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

REQUIRED
CALCULATOR

Unveiling the Retirement Myth

LEVEL Intermediate

Prerequisite

None

Special Note

Please bring the following with you to the seminar

- a basic hand calculator
- a list of income and expenses that you expect after retirement. You can download the cash flow form here www.retirementoptimizer.com/CashFlowFormInt.pdf to help you organize this information. If you have a spouse, you might want to work on it together for better accuracy. A list of your retirement assets. These are for your own use during the workshop; no one else will see them.

Overview

As baby boomers approach retirement, we need to separate the myths from the facts. This interactive full-day seminar will provide a review of how to plan for retirement based on market history since 1900. Retirement issues such as risks of investing, sustainability of life-long income, optimum asset mix, inflation protection and potential conflict of interest with your financial adviser will be covered.

Who Should Attend

Members in industry and practitioners who are close to retirement, or those who advise on retirement planning.

Content

- basics of financial planning
- review and description of the pitfalls of current retirement planning methods
- market history and retirement, how luck effects your retirement, time value of fluctuations
- four warning signals of diminishing luck
- optimum asset allocation and rebalancing, different asset allocation strategies
- common myths and pitfalls perpetuated by the financial industry
- how much income is enough, how do you determine if savings are insufficient, sufficient or abundant
- how to use the market-history-based retirement calculator
- design your own case study: are you in the Green or Red Zone?

Comments from Past Attendees

"Excellent portrayal of investment risks & uncertainties." "Fresh take on planning for retirement – considerations not expressed by my own financial advisor." "Excellent seminar, exceeded my expectations." "Good general overview of retirement planning and variable to consider." "Excellent presenter – knowledgeable, keen and humorous."

Seminar Leader

Jim Otar

Nov 19	9am-5pm	Van Conv Ctr West, Vancouver	[A83340C_VA]
Nov 20	9am-5pm	Ramada Hotel, Prince George	[A83340D_PG]
Fee $450	PD Passport Valid	1 Passport Day	7 CPD Hours

Did you know ...

Canada-BC Job Grant

Employers in BC can apply for the Canada-BC Job Grant. This cost-sharing program can provide up to two-thirds of the cost of training new and current employees up to a maximum of $10,000 per grant. For details, please go to: www.workbc.ca/canadabcjobgrant

CPABC Tax Courses Accredited by the Law Society of BC

Beginning in 2012, CPABC PD tax seminars are accredited by the Law Society of British Columbia. Practicing BC lawyers can now earn CPD credits by attending tax seminars offered through CPABC PD.

Early Registration & Waitlists

We strongly encourage members to register early. Early registration will not only ensure your space in some of our highly popular seminars, but will also prevent seminars with lower enrolment from being cancelled. The maximum number of participants in a seminar is dependent on the type of presentation and delivery format set by the course author and/or instructor. Although we try to accommodate as many requests as we can, we do not want to compromise the ability of our instructors to teach effectively. If a seminar is already full, you can request to be waitlisted.

Attire at PD Seminars

While there is no official dress code at our seminars, the majority of attendees arrive in business casual attire. As meeting room temperatures fluctuate throughout the day, it is advisable to dress in layers.

Scent-Aware Environment

Some individuals are more sensitive to certain scents and the chemicals used to create those scents. We ask that registrants be more scent-aware before attending our seminars, and minimize the use of fragrances as a courtesy to everyone sharing the same learning space.

Lunch & Coffee Service at Seminars

Coffee service is provided at all seminars. Lunch is provided only at full-day seminars. Breakfast is not provided except at Executive Breakfast seminars, and at certain PD events that begin earlier in the morning.

Special Dietary Requirements

We will do our best to accommodate requests for special dietary considerations for attendees who have food allergies, as well as vegetarian or vegan requests, but please note that personal preferences, such as a preference for one type of protein over another, will not be accommodated. Please inform us at the time of registration if you have any food allergies (NOT preferences). We will pass along your name and information to the catering staff at the seminar facility and you will need to identify yourself to the server at lunch time. Note that this only applies to full-day seminars where lunch is provided.

Late Arrivals

If you arrive late, you should complete and submit the Late Arrival Card, provided with the course material, to the instructor. This ensures you will receive the CPD credit for the time you were in attendance.

In Fall 2017, CPABC rebranded the multitude of conference days we bring to you annually. Our current brand – PD Nexus – is intended to leverage the meaning of the words "connection" or "link". Our Nexus days will be focused on helping you build connections to new knowledge, linkages to new themes, and creating environments where you can network and learn from your peers. Our Fall 2018 PD Nexus lineup includes:

PD Nexus: Scientific Research and Experimental Development Symposium

October 5, 2018 | Vancouver Convention Centre West

PD Nexus: Estate Planning Insights

Formerly Estate Planning Conference Day

October 23, 2018 | Vancouver Convention Centre West

PD Nexus: Public Practice Insights

Formerly Practitioners' Potluck

November 15, 2018 | Vancouver Convention Centre West

PD Nexus: Business Insights Vancouver

Formerly Members in Business & Industry PD Day

December 7, 2018 | Vancouver Convention Centre West

SPECIAL FEATURE: PAPERLESS
NOTABLE FORMAT: CONFERENCE DAY

PD Nexus: Business Insights (Vancouver)

LEVEL General

Prerequisite

None

Overview

Keeping up to date on current economic trends and professional knowledge can be a challenge. This fast paced PD Nexus Day will bring you technical updates in accounting ,tax and risk management topics and opportunities to develop new or deeper leadership skills and knowledge. In a combination of plenary and breakout sessions, you'll 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.

Who Should Attend

Professional accountants and other financial professionals in business and industry.

Content

The conference-format day will include keynote presentations at the beginning and end of the day, with breakout sessions in between.

For detailed information on sessions and speakers, please watch for future flyers, emails, or check our website at pd.bccpca.ca.

Comments from Past Attendees

"Covers a good variety of topics." "An excellent conference! Thank you!" "Interesting and relevant topics and speakers." "Great course format, with multiple topics to choose from." "It's great to have various sessions to choose from." "Concise updates and interesting speakers."

Conference Speakers

Our speakers are experts in their fields, and are highly regarded professionals in the business, finance, and academic communities. A complete list of speakers and their biographies will be available on our website at pd.bccpa.ca, and in an upcoming edition of the PD Pathways newsletter.

Dec 07	**8:30am-4:30pm**	**Van Conv Ctr West, Vancouver**	**[M87100B_VA]**
Fee $475	**PD Passport Valid**	**1 Passport Day**	**7 CPD Hours**

SPECIAL FEATURE: PAPERLESS
NOTABLE FORMAT: CONFERENCE DAY

PD Nexus: Estate Planning Insights

A joint conference by CPABC and the Society of Trusts and Estate Practitioners (STEP) Vancouver

LEVEL Introductory to Intermediate

Prerequisite

None

Overview

This is a joint conference-format PD Day presented by the Society of Trust and Estate Practitioners (STEP) Vancouver branch and CPABC. It will provide participants with up-to-date, practical, and leading-edge estate-planning information, as well as access to highly-regarded speakers covering current and relevant estate-planning issues.

Don't miss out on this information-packed day and on the chance to meet and network with other estate-planning professionals.

Who Should Attend

Estate-planning practitioners including professional accountants, lawyers, trust officers, and other financial professionals.

Content

- Morning Plenary – The New Landscape: Recent Tax Changes (Federal, Provincial, and Municipal) Affecting Real Estate
- AM Concurrent Sessions #1 (choice of one)
  - Tax and Accounting Implications of Probate Planning, Including Alter Ego and Joint Spousal Trusts
  - U.S. Tax Cuts & Jobs Act: The Impact on Estate Planning for Clients Who Are U.S. Persons or Who Hold U.S.-Sited Assets
- AM Concurrent Sessions #2 (choice of one)
  - Planning for First Nations Clients
  - Life Insurance Update
- Afternoon Plenary – But What Does it All Mean? Practical Implications for Estate Planning of the New Tax Rules, Including TOSI and Compliance
- PM Concurrent Sessions (choice of one)
  - How Vulnerable is the Discretionary Family Trust? A Discussion of Its Fate on Marriage Breakdown and Other Attacks
  - The Shareholders' Agreement as a Tool to Facilitate Business Succession: Key Provisions

Conference Speakers

Stephanie Daniels	Florence Marino
Sally Dennis	Kate Marples
Kiu Ghanavizchian	Sheryne Mecklai
Lisa Hamilton	Cheyenne Reese
Michelle Isaak	Richard Weiland
Kirsten Jenkins	Janice Wells
Roger Lee	Geoff White
Sharon MacMillan	Hugh Woolley

Oct 23	**8:30am-4:30pm**	**Van Conv Ctr West, Vancouver**	**[T87300A_VA]**
Fee $475	**PD Passport Valid**	**1 Passport Day**	**7 CPD Hours**

SPECIAL FEATURE: PAPERLESS | NOTABLE FORMAT: CONFERENCE DAY

PD Nexus: Public Practice Insights

LEVEL Introductory to Intermediate

Prerequisite

None

Overview

Now offered annually, this popular conference for CPABC members in public practice has been updated with new topics and a revised format. 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.

Who Should Attend

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

Content

There will be a mixture of plenary sessions and your choice of breakout presentations during the day, including two moderated afternoon roundtables to share information and best practices on a topics relevant to you and your practice.

Comments from Past Attendees

“This has been a great event. I have attended for years.” “Loved it, great information and wonderful to see practitioners sharing information and learning from each other.” “Overall good selection of topics.” “The pace and content and presenters were excellent.”

Conference Speakers

Our speakers are experts in their fields, and are highly regarded professionals in the public practice community. Senior staff from CPABC will also present updates on items of importance to practitioners.

Nov 15	8:30am-4:30pm	Van Conv Ctr West, Vancouver	[A87010A_VA]
Fee $475	PD Passport Valid	1 Passport Day	7 CPD Hours

TITLE STATUS: NEW | SPECIAL FEATURE: PAPERLESS | NOTABLE FORMAT: CONFERENCE DAY

PD Nexus: Scientific Research and Experimental Development (SR&ED) Symposium

LEVEL Intermediate to Advanced

Prerequisite

None

Overview

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.

Who Should Attend

Accountants, engineers and others who advise on SR&ED matters, both specialists and general practitioners. It will also be of interest to technical experts and financial executives accountable for tax filings and SR&ED compliance, as well as CRA and Department of Finance employees responsible for SR&ED matters.

Content

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

- Plenary 1 - CRA Services & Tools
- Plenary 2 - Current Trends Practitioners are Seeing With CRA – A Panel Discussion
- Plenary 3 - Recent Case Law Update
- Plenary 4 - Being Prepared for Success for SR&ED Reviews
- Workshop Breakout Sessions (choice of one)
  - 1A – IT & Software Technical and Financial Components
  - 1B – Shop Floor Technical and Financial Components
- Plenary 5 – CRA Roundtable

Conference Speakers

Our speakers are experts in their fields, and are highly regarded professionals in the SR&ED professional communities.

Oct 05	8:30am-4:30pm	Van Conv Ctr West, Vancouver	[T87100A_VA]
Fee $475	PD Passport Valid	1 Passport Day	7 CPD Hours

CONTROLLER'S PROGRAM Created with the aspiring and new Controller in mind.	**CFO'S PROGRAM** Geared towards aspiring and new CFOs.	**CFO AS NAVIGATOR PROGRAM** Geared towards seasoned financial executives.	**THE CEO PROGRAM** Geared towards current and aspiring leaders.	**ENTERPRISE RISK MGMT FUNDAMENTALS** Geared towards financial professionals seeking knowledge in the area.
The Controller's Operational Skills Program focuses on the core technical processes and procedures of the financial role.	The CFO's Operational Skills Program focuses on the strategic technical competencies of the role.	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.	The CEO Program is a practical and provocative stand-alone advanced program for current and aspiring leaders seeking to excel in the upper echelons of executive responsibility.	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 specifically in the area of enterprise risk management.
The Controller's Management Program focuses on honing your personal and interpersonal effectiveness.	The CFO's Leadership Program focuses on developing the skills of an influential leader in your organization.			

The Controller's Management Program

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. The Controller's Management Program is designed to provide you with the theory, best practices, tools and skills to further sharpen your leadership and management skills. The program concentrates on four key leadership areas: Self-awareness and self-management; Organizational perspective and influence; Managing and leading others; Effective communication for a variety of contexts.

Who Should Attend

This program is for you if you are

- relatively new to a Controller or Financial Manager role
- aiming to move up to the Controller role from another position
- preparing to shift from a staff position or public practice into an industry management role
- looking to sharpen interpersonal and management skills

Special Features

- leadership assessments done prior to the program
- one-on-one coaching (on-site) – an opportunity to support the self-work with a professional Executive Coach to help establish personal and professional development goals

Faculty

Linda Lucas, CPA, CMA is Chief Executive Officer at Roper Greyell LLP, Employment + Labour Lawyers. Linda has twenty years of experience in all aspects of finance and operations, and has worked in many different industries across Canada, United Kingdom, Cayman Islands and the Bahamas.

Lesley-Ann Marriott, CEC, PCC is a Certified Executive Coach who holds the advanced credential of Professional Certified Coach. Lesley-Ann has over 25 years of leadership and management experience.

The Program

This is an in-residence program, and participants are encouraged to stay on-site. The program cost includes course materials and some meals. Accommodation is extra – please contact us for more information. The regular program fee is $3,150, but register at least two months prior to the offering date for an early bird discount of $300. Note: Executive Programs are PD Passport Invalid.

Upcoming Dates

November 18-21, 2018	Westin Bear Mountain, Victoria
May 8-11, 2019	Whistler
September 18-21, 2019	Whistler

The Controller's Operational Skills Program

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. The Controller's Operational Skills Program is designed to enhance your role on the management team by sharpening your skills in risk management and controls, ethical leadership, planning, budgeting and forecasting, performance measurement approaches and financial reporting. You will explore ways to maximize the effectiveness of your accounting department through staffing and structure, policies and procedures, and process and quality management. You will gain insights into performance enablers for success, with a focus on information management and human resources management, and an eye towards trends in Controllership.

Who Should Attend

Are you responsible for management and financial reporting? Do you want to build upon your operational skills and knowledge of Controllership? Do you want to gain more confidence and be more effective in your role? If you answered "yes", and if you are either an aspiring Controller or an existing Controller, then this is the program for you.

Faculty

Mia Maki, BA, MBA, FCPA, FCMA, is faculty with the University of Victoria, Gustavson School of Business and Gill Graduate School, and is a consultant through Quimper Consulting Inc. Formerly Chief Financial Officer and Chief Operating Officer for a Victoria-based technology company, Mia has assisted in raising over $40 million in funds and in international initiatives including acquisitions (United States), strategic partnerships (Japan) and joint subsidiary creation (Europe).

The Program

This is an in-residence program, and participants are encouraged to stay on-site. The program cost includes course materials and some meals. Accommodation is extra – please contact us for more information. The regular program fee is $3,150, but register at least two months prior to the offering date for an early bird discount of $300. Note: Executive Programs are PD Passport Invalid.

Ethics Content

This seminar contains 4 hours of ethics content.

Upcoming Dates

September 16-19, 2018	Delta Whistler Village, Whistler
November 14-17, 2018	Westin Bear Mountain, Victoria
May 12-15, 2019	Whistler
July 10-13, 2019	Vancouver
September 22-25, 2019	Whistler
November 13-16, 2019	Victoria

The CFO's Leadership Program

The role of the Chief Financial Officer (CFO) 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.

The CFO's Leadership Program is an intensive and interactive program that blends best practices, case studies, group discussions and role-play to allow participants to advance their leadership skills to move from the technical aspects of being a finance professional, to being a strategic partner. This program concentrates on areas where CFOs have told us they feel they need the most help.

Who Should Attend

This program is for you if you

- direct, or wish to direct the finance and administration areas of your organization
- provide, or are seeking to position yourself as counsel to the CEO and the Board
- wish to expand your knowledge and develop your leadership skills as they apply to strategy execution and talent management in the finance and administration area
- want a unique opportunity to go beyond focusing on what you are doing as a leader to truly understand how you are being a leader

Faculty

Tammy Towill, MBA, FCPA, FCMA is a partner in the Cordura Group 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.

Lesley-Ann Marriott, CEC, PCC is a Certified Executive Coach who holds the advanced credential of Professional Certified Coach. Lesley-Ann has over 25 years of leadership and management experience.

The Program

This is an in-residence program, and participants are encouraged to stay on-site. The program cost includes course materials and some meals. Accommodation is extra – please contact us for more information. The regular program fee is $3,250, but register at least two months prior to the offering date for an early bird discount of $300. Note: Executive Programs are PD Passport Invalid.

Upcoming Dates

September 19-22, 2018	Delta Whistler Village, Whistler
June 12-15, 2019	Vancouver
October 16-19, 2019	Whistler

The CFO's Operational Skills Program

As senior advisor to the CEO and the Board – the CFO has five distinct 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. This program delivers the core CFO competencies that organizations expect and demand. Get up to speed on corporate governance and risk management and the latest tools and application. Examine the relationship of strategy and risk-taking and help drive your organization's mission and success.

Nail down the planning, budgeting and internal control competencies that facilitate efficient and effective operations. Explore the value-added CFO competencies in business valuation, business intelligence, M&A and intellectual property. Learn how to effectively communicate the core finance and operating results for internal and external stakeholders.

Who Should Attend

Do the CEO and the Board look to you for counsel and guidance? Do you currently direct, or wish to direct the finance and administration areas of your organization? Are you trying to improve governance, accountability and the control environment? Would you like to examine the state-of-the-art developments in strategy, risk management and financial reporting? If so, then this program was created with you in mind.

Faculty

Jeffrey Sherman, MBA, CIM, FCPA, FCA, has over 20 years of experience as a Chief Financial Officer, primarily in the high tech, biotech and mineral exploration areas, with a large chartered bank in various senior capacities, and as a consultant in corporate finance. His areas of expertise include corporate governance, risk management, corporate finance, restructuring and start-up enterprises.

The Program

This is an in-residence program, and participants are encouraged to stay on-site. The program cost includes course materials and some meals. Accommodation is extra – please contact us for more information. The regular program fee is $3,250, but register at least two months prior to the offering date for an early bird discount of $300. Note: Executive Programs are PD Passport Invalid.

Ethics Content

This seminar contains 4 hours of ethics content.

Upcoming Dates

September 23-26, 2018	Westin Whistler Resort, Whistler
June 9-12, 2019	Vancouver
October 20-23, 2019	Whistler

The CFO as Navigator Program

Steering the Enterprise towards Value Creating Growth

The 21st century CFO is hearing the new calling from the corporate boardroom - "Step out and go beyond the box". The CFO as Navigator program is designed to provide you with a highly applied and interactive experience and will cover areas such as value creating growth, value metrics, best in class management reporting platform, enterprise dashboards, performance metrics and strategy maps, information management and business intelligence, corporate planning platform design and creation, talent management and incentive design. This program is designed to make you a complete CFO.

Who Should Attend

Do you feel that a broader knowledge base may augment your considerable finance/accounting knowledge? Are you interested in learning about new tools and methods to add value to your enterprise? Do you want to go beyond the stovepipe finance function? Do you have a desire to do more and be a complete CFO and lead a best in class finance function? If so, then this program is for you. This program is geared particularly towards those CFOs/Controllers in mid-market companies who are at the zenith of their career and are ready for the next challenge in their career.

Faculty

Dr. Vijay Jog is the Founder-President of Corporate Renaissance Group, a firm dedicated to driving better business management and performance. He has led CRG's growth in areas of corporate dashboards, business intelligence, bridging 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. He is also the Chancellor Professor of Finance at the Sprott School of Business, Carleton University.

The Program

This is an in-residence program, and participants are encouraged to stay on-site. The program cost includes course materials and some meals. Accommodation is extra – please contact us for more information. The regular program fee is $3,250, but register at least two months prior to the offering date for an early bird discount of $300. Note: Executive Programs are PD Passport Invalid.

Upcoming Dates

October 10-13, 2018	Westin Whistler Resort, Whistler
July 17-20, 2019	Vancouver
October 23-26, 2019	Whistler

New program!

Enterprise Risk Management Fundamentals Program

In our increasingly complex environment, it is critical that Finance professionals understand and embrace Risk Management as a key discipline. This three-day, seven 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.

Learning outcomes

- understand how enterprise risk management enhances corporate governance and aligns with strategy and culture
- identify and assess various risks that may have critical impact on business, and choose the optimal risk mitigation strategies
- develop successful strategies for reporting on risk for Senior Management and Boards
- learn and properly apply key risk management tools

Who Should Attend

The program will be of great benefit to financial professionals with a few years of experience, who want to learn the fundamentals and best practices of risk management in order to either further their career, or add value to their organization. It is especially valuable for those financial professionals in organizations and industries where Risk Management is gaining critical importance.

Faculty

William (Bill) Wesioly, CPA, CMA is an independent Risk Management consultant and professional Leadership coach. He is an enthusiastic and accomplished leader whose goal is to enrich the effectiveness of people and organizations, with both skill and heart. Prior to becoming an independent consultant, he worked in the financial services industry holding leadership roles of increasing responsibility, first with BMO and then with RBC. His main area of focus was in the field of Risk Management where he successfully built and led risk management programs such as Risk and Control Assessments and Operational Risk Scenarios.

The Program

This is an in-residence program, and participants are encouraged to stay on-site. The program cost includes course materials and some meals. Accommodation is extra – please contact us for more information. The regular program fee is $3,150, but register at least two months prior to the offering date for an early bird discount of $300. Note: Executive Programs are PD Passport Invalid.

Ethics Content

This seminar contains 0.5 hours of ethics content.

Upcoming Dates

October 14-17, 2018	Sutton Place, Vancouver

New program!

The CEO Program

The title CEO is a misnomer. Leaders no longer execute, they decide … then motivate others to execute. They confront and unlock the immense, unforeseen opportunities that arise from turbulent, often unexplainable forces impacting their marketplace. They realize yesterday's solutions aren't just insufficient, they're counter-productive. So they "go back to school" to acquire the skills, insights and confidence to seize the white spaces of growth. They are in demand and they know it. Leading with purpose requires the ability to build and apply one's strategic intelligence, prick the bubble of ignorance and anticipate career derailers, select talent and develop a cohesive executive team, respond courageously to unexpected high-impact surprises, devise workable strategies that inform and inspire, and foster a culture of resilience that competes for the future.

This practical, provocative, one-of-a-kind program is the creation of Dr. Jim Murray, who has successfully led large and small organizations in the public and private sectors over the course of five decades. He counsels executives on how to handle complexity, uncertainty and the transformative volatility that impact their enterprise.

Who Should Attend

This advanced program is designed for current and aspiring leaders who seek to excel with confidence and conviction in the upper echelons of executive responsibility. Do you possess the emotional and mental qualities, interpersonal skills, street-smart insights, decision-making competencies and executive presence to lead? Beyond requisite skills, leadership means avoiding the allure of the slippery slope, knowing how to lead people who are brighter than you, designing a smart and a healthy organization, and deciding when "the game" must be retooled. Smart leaders have also resolved the life-altering questions that can determine one's identity and thus one's destiny.

Faculty

Dr. Jim Murray is CEO of optimal solutions international, a firm dedicated to helping people and organizations achieve their full potential. Jim has created and taught courses for CPABC since 1982. He holds four degrees, is the architect of several advanced executive development programs for four provincial CPA bodies, has published three best-selling books and provided strategic counsel to over 600 organizations. He has been nationally honoured by the university community and his courses formally recognized for "excellence in innovation and design".

The Program

This is an in-residence program, and participants are encouraged to stay on-site. The program cost includes course materials and some meals. Accommodation is extra – please contact us for more information. The regular program fee is $3,150, but register at least two months prior to the offering date for an early bird discount of $300. Note: Executive Programs are PD Passport Invalid.

Upcoming Dates

September 16-19, 2019 | Whistler

Testimonials

Controller's Operational Skills Program

"Very useful program - helped me to understand better how my organization is structured and why, and identify areas/ opportunities for improvement."

"Challenged me to consider the broader aspect of my job and to implement some new ideas."

Controller's Management Program

"The program provided valuable management training in the areas of coaching, leadership, change management, conflict management and managing people. This training will be essential to me as a leader in my workplace."

"Great knowledge and networking tool. I thoroughly enjoyed the breadth of talent and backgrounds of my peers in the program. The knowledge and experience in the group was an invaluable working asset."

CFO'S Operational Skills Program

"It was great to learn new ways to approach opportunities and challenges in the CFO role. Topics covered ranged from strategic to tactical and I look forward to implementing them to add value in my zone."

"Excellent course to improve core competencies for any CFO or Finance Executive, and a great chance to interact in a wonderful setting."

CFO's Management Program

"A well-rounded program that covers a wide range of essentials needed for highly effective leadership. It was well presented and provided me with many takeaways. I enjoyed my time and highly recommend the course. Great presenters."

"Both facilitators kept us moving through the large volume of information. The one-on-one coaching was invaluable and was a brilliant addition to the program."

CFO as Navigator

"The course is such a wealth of knowledge. Illustrates just how much information is out there. Guides you to a point where you can dive in and get immersed."

"This is an excellent course both for those new to the CFO position but also as a mechanism for experienced CFOs to assess whether they are paying attention to the right things."

PD AudioWeb (On-Demand)

Eligible for Verifiable CPD Hours!

PD AudioWeb are direct recordings from live PD seminars.

The audio recordings and corresponding powerpoint visuals are available as MP4 files, along with any available handout materials in PDF files, from our website.

These titles 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 get started

After you purchase your AudioWeb title(s), we will email you a web link where you can access the MP4 files. You will also be able to download any available handouts for that seminar in PDF. If the audio title is available, you will receive the email within one working day after your order is processed. After you have finished listening to the audio file, you can return to the webpage and complete the quiz.

Special Note

- all new and updated AudioWeb titles will be available two weeks after the classroom seminar date – please take this into consideration before placing your order.
- most titles are recorded from Executive Brief sessions, and are eligible from 1.25 to 2 Verifiable CPD hours each – half-day sessions are eligible for 3.5 Verifiable CPD hours each – these hours are noted in brackets next to each title.
- PD AudioWebs are eligible under the Personal and Flexi PD Passport programs. Each title costs 1/3 of a Passport Day.

Because these audio recordings are made from live seminars, the information presented is up-to-date at the time of recording. While we make an effort to keep the our inventory updated and seasonally remove outdated titles, changes in accounting, tax and other acts and legislations can happen at any time.

It is up to the purchaser to take note of the recording date, and to determine for themselves whether the recorded audio is still relevant to their needs.

PD AudioWeb Titles Available

Eligible CPD hours are indicated in brackets next to each title.

Accounting, Assurance & Financial Reporting Titles

PSAS – Introduction to Asset Retirement Obligations Nov 2018 (2)
Presenter: Bill Cox
The objective of this session is to enable participants to understand this new PSAS standard and the implications it will have for local governments, senior governments, and government organizations.
Code: U8515AA_OD $110

PSAS – Introduction to Public Private Partnerships Dec 2018 (2)
Presenter: Bill Cox
The objective of this session is to enable participants to understand this new PSAS standard and the implications it will have for local governments, senior governments, and government organizations.
Code: U8516AA_OD $110

Review Engagements: Introduction to the New Standards Oct 2018 (3.5)
Presenter: Diane McDonald
This session is designed to provide a review of the application of the new Canadian Standard on Review Engagements (CSRE) 2400, Engagements to Review Historical Financial Statements, which is effective for periods ending on or after December 14, 2017. Each stage of the review engagement will be considered, from planning to issuance of the practitioner's report, including a high-level examination of changes relative to the former standards.
Code: U8514AA_OD $110

Public Practice Titles

Considering Starting a CPA Practice Oct 2016 (2)
Presenter: Bridget Noonan
The purpose of this webinar is to provide general information at the contemplation stage of starting a public practice. Prior to undertaking this rewarding, yet demanding career and initiating the registration and/or licensing process, it is important to understand the general time and cost commitments. This webinar will address a number of pre-registration considerations with a focus on the high-level business, professional and regulatory requirements of running a public practice.
Code: U8510AA_OD Free

Navigating ASPE Oct 2017 (1.5)
Presenter: Diane McDonald
This session will help you navigate ASPE, Knotia and highlight other tools which can assist you in answering ASPE questions. It will also address common ASPE deficiencies and how to remedy within financial statements. Topics addressed include: CPABC practice inspection findings on the application of ASPE; Private Enterprise Advisory Committee activities; CPA Canada and Financial Reporting & Assurance Standards Canada websites.
Code: U8511AA_OD $75

More than Bean Counters – Branding and Marketing Your CPA Firm Oct 2017 (1.25)
Presenters: Grant Smith, Corinne Impey
This session, co-presented by a communications specialist and a public practitioner, will explore branding considerations for small firms, as well as online marketing strategies including website design, email marketing and the use of social media to reach and engage both prospective and current clients.
Code: U8512AA_OD $75

General Management Titles

Cloud Computing Dec 2016 (1.5)
Presenter: Regan McGrath
The session will discuss essentials of cloud-based computing for accounting in industry: when to move your organization to the cloud; responsible transition from a paper-based to a cloud-based platform; security in the digital environment; best practices in digital file management; and cloud-based financial technology and integrations on the market.
Code: U8510MA_OD $75

Employment Standards Overview Jun 2018 (3.5)
Presenter: Geoffrey Howard
The purpose of this seminar is to review compliance with key provisions of the Employment Standards Act, including any recent updates, as well as commonly misunderstood and overlooked employment standards rules.
Code: U8511MA_OD $110

Ethics in the Real World Dec 2016 (1.5)
Presenter: John Daley
This session will help you understand the four root causes of unethical behavior and eight steps to create an ethical business culture. Learn how to teach your team the basic tools of ethical decision-making and understand six approaches to making better ethical decisions. This sessions contains 1.5 hours of ethics content.
Code: U8513MA_OD $75

Fostering Innovation & Entrepreneurial Thinking Dec 2017 (2)
Presenter: Sarah Morton
This session will focus on how to foster that culture, while leveraging data and information to create a modern and adaptive business environment that leads to organizational success.
Code: U8528MA_OD $75

Handling Termination of Employment Dec 2016 (2)
Presenter: Geoffrey Howard
This session provides an overview of issues surrounding the termination of employment, and includes recent updates in the area.
Code: U8514MA_OD $75

Lenders, Banking, and Your Client Dec 2016 (3.5)
Presenter: Kristi Miller
This session will help you better understand what your lender wants, and in turn, how you can help your client or company better negotiate its borrowing facilities.
Code: U8515MB_OL $110

Maximize Your Workforce: Bridging the Generational Divide Dec 2016 (1.5)
Presenter: Robert Murray
This session dives into what you need to know to best enable today's workforce: understand the drivers for different generations interacting in today's workforce; build a culture that can accommodate each demographic group; and harness the strengths of each group to benefit the business, employees and customers.
Code: U8516MA_OD $75

Negotiating: Challenges & Pitfalls Mar 2003 (2)
Presenter: Tom Knight
This session will look at some of the sharpest challenges faced by negotiators and mistakes we commonly make in response to them. It will provide some key learnings from negotiations research and experience to help you conduct more effective negotiations in challenging circumstances.
Code: U8517MA_OD $75

Planning for a Business Nov 2016 (2)
Presenter: Rieghardt van Enter
Learn how to consider and challenge the drivers behind financial forecasts, explore how to quantify the non-financial aspects of the business; breakdown the linkages between strategy, mission and vision; and enhance your knowledge and skills in both developing and formatting powerful business plans.
Code: U8518MA_OD $75

Reduce Your Exposure to Directors' and Officers' Liabilities Dec 2008 (2)
Presenter: Tony Knox
This session will examine the obligations and pitfalls to which directors and officers are exposed, and will look at practical steps and procedures that should be implemented to avoid personal liability.
Code: U8519MA_OD $75

Retirement Planning for Financial Professionals Jul 2017 (1.5)
Presenter: Tracy Theemes
This session will discuss the changing conditions of older adulthood and new ways to approach financial planning. It will also address common mistakes in personal strategies and areas to be particularly mindful about.
Code: U8525MA_OD $75

Rising Expectations of Corporate Reporting: The Landscape of Non-Financial Disclosure Dec 2017 (1.5)
Presenter: Christie Stephenson
This session will introduce you to ESG frameworks and standards, to enable you to better understand the information reported by organizations and how to use that information in making informed decisions.
Code: U8526MA_OD $75

Supercharge Your Business with IT Jun 2017 (1.5)
Presenter: Mike Knapp
This session will lead you through the process of transforming IT from disruptor to value creator. We will review some of the top applications and tools in areas such as communications and collaboration, task management, and personal productivity..
Code: U8524MA_OD $75

Top Employment Issues Affecting Your Bottom Line — Dec 2018 (3.5)

Presenter: Geoffrey Howard

This session will provide an overview of the top employment issues including recent developments in workplace law, focusing on those issues that materially impact the bottom line.

Code: U8520MA_OD — **$110**

What is Your Happiness Practice — Jul 2015 (2)

Presenter: Tammy Robertson

Is it possible to develop strategies that help you sustain positive energy, deep engagement, and a sense of humour and lightness? If you have been on achievement autopilot driven by goals that keep you pressing forward, but not feeling excited and alive, this session will show you how to get more of the satisfaction you are craving.

Code: U8521MA_OD — **$75**

What Leaders Know About Communication — Nov 2014 (2)

Presenter: Sharon Edwards

Leaders know that without effective communication skills, it is impossible to share a vision that will create a strategy that can support a team to a successful outcome. Learn more about improving your skill set as a master communicator. Stop wasting time and energy talking in circles – communicate like a leader instead.

Code: U8522MA_OD — **$75**

Your People Strategy – Time for a Tune Up? — Oct 2016 (2)

Presenter: Marlene Delanghe

Learn the latest strategies and tips for how to attract, hire, engage and retain the most critical resource, your people. Gain tips for assessing and planning for people resources; strategies for recruiting in a social and modern world; orienting your new staff to increase engagement at the outset; growing and developing your staff in alignment with business needs; and more.

Code: U8523MA_OD — **$75**

Taxation & Wealth Management Titles

Basic Tax Compliance in Self-Employment and Home-Based Business — Feb 2018 (2)

Presenter: Mark Ostry

You're your own boss, but you're stuck with all the paperwork too. What do you need to know to make sure you're compliant with your tax obligations? This session will cover the fundamental tax compliance issues of setting up and running a self-employed small home business.

Code: U8510TA_OD — **$75**

BC PST Refresher & Comparison with GST/HST — Mar 2019 (2)

Presenter: James Capobianco

This session is designed to provide a high level overview of basic BC PST rules and to address differences between BC PST and GST/HST. It will help you recognize your (or your clients') PST responsibilities and entitlements. It is designed to be broad in scope and will not focus on any particular industry.

Code: U8533TA_OD — **$75**

Breaking Up is Hard to Do — May 2018 (3.5)

Presenters: Shane Onufrechuk, Lisa Slater

When a marriage or common-law relationship ends, dividing the family assets can be stressful and complicated. Learn how business and family assets are classified in family law and the role you can play in effectively advising both lawyers and clients.

Code: U8511TA_OD — **$110**

Cash Savings Opportunities in a Fast-Paced World — Oct 2018 (2)

This session will review incentives and tax credits that are available, some of which you may have heard of and a few you may not have. Knowledge of what incentives/credits are out there is important and timing is key.

Code: U8536TA_OD — **$75**

Corporate Tax – Shutting Down the Corporation — Nov 2018 (3.5)

Presenter: Mike Stubbing

This session will focus on the many tax issues that arise – both compliance and planning related – when shutting down a corporation, and will primarily focus on private companies. It will deal with taxable and non-taxable amalgamations and windups, as well as corporate dissolutions. Common traps and planning opportunities will be discussed.

Code: U8527TA_OD — **$110**

Creative Use of Partnerships in Tax Planning — Jun 2018 (3.5)

Presenter: John Gregory

This session will focus on the use of partnerships in creative tax planning, including some of the more common issues and pitfalls encountered by practitioners.

Code: U8513TA_OD — **$110**

Employing Contractors and Contracting Employees: Sorting Out Tax and Legal Issues — Jul 2018 (2)

Presenters: Shane Onufrechuk, Richard Press

The session 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.

Code: U8514TA_OD — **$75**

Essential Documents of any Successful Estate Plan — Mar 2019 (2)

Presenters: Andrea Frisby & Christine Muckle

Learn the "building block" legal documents that are crucial for every estate plan. While many understand a Will is needed, a well-thought-out and comprehensive estate plan may also consider trusts, marriage/cohabitation agreements, co-ownership agreements, shareholder agreements, and beneficiary designations, to name a few. We will explore these documents (and more), and just how they can be used to create a successful estate plan.

Code: U8536TA_OD — **$75**

Ethical Tax — Oct 2016 (1.5)

Presenter: Mike Coburn

Tax is seldom black or white. In this session, case studies will be used to provoke discussion on ethical dilemmas confronting accountants related to tax matters. You will be challenged to consider how you would handle a variety of ethical tax scenarios and will develop your ability to recognize ethical tax issues as well as your confidence in handling ethical tax dilemmas. This sessions contains 1.5 hours of ethics content.

Code: U8515TA_OD — $75

Executive Compensation — Jul 2018 (2)

Presenter: Ian Gamble

This session will discuss the design and taxation of deferred executive compensation plans that avoid the salary deferral arrangement rules. The plans canvassed will include stock option plans, share purchase plans, deferred bonus plans, deferred share unit plans, share appreciation right plans, and supplemental executive retirement plans. Several tax issues for each of these will be canvassed.

Code: U8537TA_OD — $75

GST/HST: Tips and Traps — Nov 2018 (2)

Presenter: James Capobianco

This session will discuss the design and taxation of deferred executive compensation plans that avoid the salary deferral arrangement rules. The plans canvassed will include stock option plans, share purchase plans, deferred bonus plans, deferred share unit plans, share appreciation right plans, and supplemental executive retirement plans. Several tax issues for each of these will be canvassed.

Code: U8536TA_OD — $75

Income Tax - Starting Up a Business — Nov 2018 (3.5)

Presenter: Mike Stubbing

This session focuses on the many tax issues that arise – both compliance and planning related – when starting a business. The session is primarily focused on private companies. It does not touch on provincial-specific regulations or non-tax issues that are relevant to private companies. Common traps and planning opportunities will be discussed.

Code: U8528TA_OD — $110

International Employees – Cross Border Tax and Social Security — Dec 2016 (2)

Presenter: Ben Reagh

International mobility is common place in our globalized economy. However, the tax implications for the individuals, and tax compliance obligations of employers, are not comparatively common knowledge. This session will cover the tax tips and traps of cross border employment for both in and out-bound arrangements to/from Canada.

Code: U8517TA_OD — $75

Introduction to Portfolio & Investment Management Techniques — Dec 2015 (1.75)

Presenter: Tanner Philp

This session will provide you with an understanding of basic portfolio and investment management techniques for use in your own investment portfolio. You will learn about the building blocks of portfolio and investment management used by professional advisors. You will come away with a greater understanding of how to manage your own portfolio, and/or develop a better benchmark against which to gauge your personal financial advisor.

Code: U8518TA_OD — $75

Legal Considerations for Death and Incapacity — Feb 2018 (2)

Presenters: Christine Muckle, Genevieve Taylor

The Wills, Estates and Succession Act (WESA) came into force in BC on March 31, 2014, and resulted in major changes in practice and procedure in the probate and estate planning field. This session will provide an overview of WESA, how it relates to your practice and what you need to know so that you can more effectively assist your clients under WESA.

Code: U8519TA_OD — $75

Planning for Disabled Taxpayers and Their Families — Nov 2016 (2)

Presenters: Shane Onufrechuk, Sadie Wetzel

An estimated 400,000 to 600,000 Canadians are "disabled". This seminar will provide practical information on Registered Disability Savings Plans and other tax advantaged programs available for disabled taxpayers, including the new qualified disability trust rules. It will also discuss how these programs interact with the provincial disability assistance scheme in BC.

Code: U8520TA_OD — $75

Probate Fee Avoidance Planning — Nov 2018 (2)

Presenter: Genevieve Taylor

The session will review the fundamentals of when and why probate is required and what property is subject to the process. It will also examine the various strategies that can be employed to avoid probate fees. Each probate fee avoidance strategy will be discussed in the context of achieving other common estate planning goals.

Code: U8522TA_OD — $75

Safe Income – A Comprehensive Review — Jun 2017 (2)

Presenters: Paul Cormack, Janette Pantry

This session will provide a comprehensive review of the concepts of safe income, the relevant case law and a review and update on the CRA's positions surrounding safe income. It will also provide some practical issues to consider when dealing with safe income.

Code: U8523TA_OD — $75

SBD Multiplication – Closing the Loopholes & the Impact on CCPCs — Jul 2017 (2)

Presenters: 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. The impact of these rules is more wide spread then the budget document suggested and will add complexity to many corporate tax returns. This session will summarize these rules and discussion new ownership structures and other considerations for companies that are impacted by these rules.

Code: U8524TA_OD — $75

Tax Changes to Estates & Trusts — Jul 2016 (2)

Presenter: Pam Prior

The objective of this session is to review the legislative changes to the taxation of estates and trusts, including loss of graduated rate taxation and non calendar year-end selection; taxation of deemed gains realized in alter ego, joint partner and spouse trusts; and rules to allow increased flexibility in the use of donation credits between a deceased individual and their estate – all of became effective as of January 1, 2016.

Code: U8525TA_OD — $75

To Be or Not To Be: The Executor – Powers, Obligations & Liabilities Feb 2019 (2)

Presenters: Christine Muckle & Genevieve Taylor

Acting as an Executor can be financially rewarding for the member or the member's client who agrees to act. However, the job can be onerous and fraught with complexity, acrimony and personal risk. The goal of this session is to provide you with sufficient knowledge so that you can make an informed decision or assist your clients in making informed decisions as to whether you or your clients should take on the Executor's role. You will learn and examine the stages of estate administration from date of death through to distribution, final accounting and release.

Code: U8529TA_OD **$75**

U.S. Tax – Cross Border Financing and U.S. Tax Reform: Tips & Traps Nov 2018 (2)

Presenters: Jodi Moss & Wynn Vo

This session will cover certain key fundamental Canadian and US tax principles applicable to cross-border financing, the impact of US Tax Reform, and tips and traps of cross-border inbound and outbound financing arrangements to/from Canada and the US.

Code: U8535TA_OD **$75**

On-Demand Archived Broadcasts

The following titles are archived recordings of seminars that were originally live-broadcasted. Each title qualifies for verifiable CPD hours upon successful completion of their corresponding quizzes.

Dispelling the Myth of "Effective Meetings"

Presenter: Tammy Towill

Learn how to assist your team in building meetings that are relevant, productive, engaging and yes, even welcomed by others in your organization.

- explore value and benefit of contribution to meetings while challenging the structure of how these meetings are undertaken
- challenge what being inclusive looks like
- look at best practices and recent research on new innovative ideas in this area
- consider the impacts of how individual communication styles and organizational culture drive the way organizations use meetings
- discuss how technology is both a tremendous opportunity and a unique challenge
- examine a specific planning framework tool designed to support your team in creating relevant, productive and engaging meetings

Code: U8551MA_OD
$225 1/2 PD Passport Day 3.5 CPD Hours

Principles of Negotiation

Presenter: Tammy Towill

In it is 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.

- gain an understanding of your motivational style and how it impacts your views, approach and results within a negotiation
- consider the role and impact of cultural and societal norms that drive both process and results
- explore the myths and traps associated with various styles of negotiations
- examine, apply and practice specific techniques, tools and strategies to increase your negotiation effectiveness

Code: U8552MA_OD
$225 1/2 PD Passport Day 3.5 CPD Hours

Live Broadcasts - CPA Ontario

Live broadcasts are delivered live, and can be accessed anywhere you have access to the internet.

The following live broadcast sessions are presented through CPA Ontario – as such, live broadcast times are based on Eastern Standard Time. Although CPABC will accept and process your registration and payment, it will be CPA Ontario staff who will administer the live broadcast. CPABC staff may not necessarily be available to assist during the live broadcasts, especially those that begin outside of office hours in BC. Your registration information will be passed along to CPA Ontario, and you will receive log in information typically 48 hours in advance of the session date. Some FAQs are listed below

FAQs

Q: What technologies are required? What browser will be needed?
A: See table below.

Supported Browsers	Supported platforms	Mobile devices (*)
Chrome 31+ IE9+ (*) Firefox 26+ Safari 6+ (*) Limited support for IE8.	Microsoft Windows XP (*) Windows 7 Windows 8, 8.1 Windows 10 Apple OSX 10.5 and up. (*) Limited support for Windows XP platform.	iOS (3.2 - 7.0+) Android (2.3 and up) Blackberry OS 10 Windows Phone (Available Soon) (*) Adobe Flash not required for mobile devices.

Q: What registration information will be provided to CPA Ontario?
A: CPABC will provide CPA Ontario with the registrant's name and email address.

Q: Who can I contact if I have technical issues on the day of the seminar?
A: Participants can click the help icon on the webcast link and they will be connected with the AV team in Ontario.

Q: How do participants ask questions during the session?
A: There is a chat box in the webcast that can be used to ask questions and chat with the other participants.

Q: Are they eligible for verifiable CPD hours?
A: Yes, there will attendance checks throughout the session – please ensure that you do not miss the necessary checks in order to receive verifiable CPD credits.

Course descriptions of each title can be found on our website at pd.bccpa.ca.

Live Broadcast Titles Available

Top Ten Mistakes Canadian Accountants Make Regarding U.S. Taxes
Code: T8315A_OL Oct 22 | 5:30am-9:15am (PST)
$225 1/2 PD Passport Day 3.5 CPD Hours

The Canada-U.S. Income Tax Treaty Demystified
Code: T8316A_OL Oct 22 | 10:30am-2:15pm (PST)
$225 1/2 PD Passport Day 3.5 CPD Hours

Income Tax - Update 2018
Code: T8317A_OL Oct 23 | 5:30am-2pm (PST)
$450 1 PD Passport Day 7 CPD Hours

Family Law and the Income Tax Act
Code: T8318A_OL Nov 07 | 5:30am-2pm (PST)
$450 1 PD Passport Day 7 CPD Hours

Finance and Treasury for Accountants - The Business Side
Code: T8319A_OL Nov 08 | 5:30am-2pm (PST)
$450 1 PD Passport Day 7 CPD Hours

De-Stress for Success
Code: T8320A_OL Nov 13 | 5:30am-9:15am (PST)
$225 1/2 PD Passport Day 3.5 CPD Hours

Thinking Outside the Box
Code: T8321A_OL Nov 13 | 10:30am-2:15pm (PST)
$225 1/2 PD Passport Day 3.5 CPD Hours

Stocks, ETFs and Mutual Funds
Code: T8322A_OL Nov 14 | 5:30am-2pm (PST)
$450 1 PD Passport Day 7 CPD Hours

Essential Personal Insurance Strategies for a Lifetime
Code: T8323A_OL Nov 21 | 5:30am-9:15am (PST)
$225 1/2 PD Passport Day 3.5 CPD Hours

Better Understanding of Enterprise Risk Management
Code: T8324A_OL Nov 21 | 10:30am-2:15pm (PST)
$225 1/2 PD Passport Day 3.5 CPD Hours

Information, Insights and Influence - How Big Data is Defining the Future Executive
Code: T8325A_OL Nov 22 | 5:30am-2pm (PST)
$450 1 PD Passport Day 7 CPD Hours

ASPE and ASNFPO - Update 2018
Code: T8326A_OL Dec 04 | 5:30am-9:15am (PST)
$225 1/2 PD Passport Day 3.5 CPD Hours

Assurance & Professional Practice Update – Just for Auditors
Code: T8327A_OL Dec 04 | 10am-12pm (PST)
$130 1/2 PD Passport Day 2 CPD Hours

Assurance & Professional Practice Update – Other than Audit
Code: T8328A_OL Dec 04 | 12:30pm-2:30pm (PST)
$130 1/2 PD Passport Day 2 CPD Hours

Bridging the Generational Gap
Code: T8329A_OL Dec 05 | 5:30am-9:15am (PST)
$225 1/2 PD Passport Day 3.5 CPD Hours

Delivering and Designing Effective Presentations
Code: T8330A_OL Dec 05 | 10:30am-2:15pm (PST)
$225 1/2 PD Passport Day 3.5 CPD Hours

Management Accounting – Foundations
Code: T8331A_OL Dec 06 | 5:30am-2pm (PST)
$450 1 PD Passport Day 7 CPD Hours

GST/HST - Specific Topics
Code: T8332A_OL Dec 10 | 5:30am-2pm (PST)
$450 1 PD Passport Day 7 CPD Hours

NFPO and Registered Charities - Accounting and Taxation Issues
Code: T8333A_OL Dec 11 | 5:30am-2pm (PST)
$450 1 PD Passport Day 7 CPD Hours

Online Seminars

We are pleased to continue to offer the following seminars converted into on-line modules. Past participants feel that this convenient, economical and interactive seminar delivery is a perfect alternative for those having difficulty attending our seminars, or who want to experience a new and innovative way of learning.

What You Can Expect

Prior to the session commencement, you will be given password access to the online courseware via e-mail. You will find instructions on how to work through the session, all necessary seminar materials, as well as a range of interactive learning activities designed to make studying on the internet a rich and relevant experience. Each session will be offered in module format. Access to the expert (instructor) online will be available over the duration of the session, except for sessions that are indicated as "on-demand".

How to Get Started

1. Ensure you have access to a computer with the minimum computer requirements (below), internet, and possess basic computer skills.
2. Submit your registration, payment, and an email address.
3. "Getting Started" instructions will be emailed to you (this is usually sent a few days before the start date).
4. Clicking on the link and then entering your ID and Password when prompted will enable you to access the course site.

Minimum Computer Requirements

The default format for use during your program will be Microsoft Word and Excel. The program will run best from a cable or higher connection. You will also need current Adobe Flash Plugin, current Adobe PDF Reader Plugin, and current Java Plugin.

Verifiable CPD Hours

Each title qualifies for verifiable CPD hours upon successful completion of the quizzes at the end of each module.

Available Titles

ASPE: Review of the Standards

Facilitator: Patricia Dahm LEVEL Intermediate

This two-day seminar is designed to review Part II – Accounting Standards for Private Enterprises (ASPE) from cover to cover, encompassing all sections and guidelines. In addition, the seminar will identify and outline the accounting policy choices available to management in applying ASPE. See page 35 for a more detailed course description.

Oct 9-Dec 31 Code: A85000B_OL
Jan 14-Mar 8 Code: A85000C_OL
$440 2 Passport Days 14 CPD Hours

Audit Engagements – Review of the Standards

Facilitator: Cindy Kottoor LEVEL Introductory to Intermediate

This seminar provides a solid foundation in the practical application of the Canadian Auditing Standards (CAS) to audit engagements. Participants will build on their understanding of the standards, with an emphasis on areas identified as common pitfalls in national practice inspection findings. See page 29 for a more detailed course description.

Oct 9-Dec 31 Code: A85010B_OL
Jan 14-Mar 8 Code: A85010C_OL
$440 2 Passport Days 14 CPD Hours

IFRS – Review of the Standards

Facilitator: Liz Farrell LEVEL Introductory

The objective of this seminar is to provide participants with a solid introduction to Part I - International Financial Reporting Standards (IFRS). The seminar will also cover IFRS standards currently under development at the International Accounting Standards Board (IASB) that are expected to be introduced during the next year. The focus is on the IFRS standards that apply to most profit-oriented entities. See page 38 for a more detailed course description.

Oct 9-Dec 31 Code: A85020B_OL
Jan 14-Mar 8 Code: A85020C_OL
$440 2 Passport Days 14 CPD Hours

NFPOs: Review of the Standards

Facilitator: Tony McGregor LEVEL Introductory

Organizations that operate in the not-for-profit sector are developing new operational models, increasing in complexity and are seeing an increasing need by financial statement users for transparency and comprehensive information. This course will discuss the application of accounting standards, with an emphasis on areas where choice exists, that are found in Part III- Accounting Standards for Not-for-Profit Organizations (ASNFPO) and relevant sections of Part II - Accounting Standards for Private Enterprises (ASPE). See page 41 for a more detailed course description.

Oct 9-Dec 31 Code: A85030B_OL
Jan 14-Mar 8 Code: A85030C_OL
$220 1 Passport Day 7 CPD Hours

Review of Corporate Tax Planning

Facilitator: Julie Swanson LEVEL Intermediate

This refresher in corporate tax is designed for those who desire to update and refresh their knowledge in both technical and tax planning issues for corporations. Although the corporation taxation for public and private corporations is reviewed, the primary focus is on the taxation of private companies. See page 131 for a more detailed course description.

Oct 9-Dec 31 Code: T85100B_OL
Jan 14-Mar 8 Code: T85100C_OL
$440 2 Passport Days 14 CPD Hours

Review of Personal Tax Planning

Facilitator: Julie Swanson LEVEL Intermediate

This two-day refresher 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. Although the taxation for trust and partnerships is reviewed, the primary focus is on the taxation of individuals. See page 132 for a more detailed course description.

Oct 9-Dec 31 Code: T85000B_OL
Jan 14-Mar 8 Code: T85000C_OL
$440 2 Passport Days 14 CPD Hours

K2E Canada Inc
Technology-Focused Webinars

CPABC in partnership with K2E Canada Inc are pleased to present the following technology-focused webinars to our members. Participants who take these webinars will have the opportunity to learn from an award-winning team of instructors.

How to Get Started

1. Upon registration and payment, the participant will receive an email from K2 confirming their registration along with instructions on how to join the session.
2. To connect to the online training session, simply click on the designated link in the email message.
3. Audio options – you can either listen in through your computer's audio system, or dial-in to the online training event using your phone. Please note these will not be toll-free calls.
4. Platform – K2 will use the GoToTraining solution from Citrix as the training platform. This solution works with virtually all computers.

Verifiable CPD Hours

Testing is required to complete a K2 online training course and earn CPD credits. However, at intervals during the presentation, you will need to respond to polling questions to confirm your attendance and active participation in the event. A minimum of four polling questions will be presented for each recommended CPD credit hour. You must answer at least 75% of these questions in order to receive full CPD credit for the program.

Registration Note

Please note that as login instructions and course reminders will be emailed to the registrant from K2E, it is necessary for CPABC to provide your name and email to K2E Canada Inc – these will be used solely for confirmations and reminders for the registration(s) only.

Upcoming Webinars

The following are a selection of titles offered. You will find course descriptions, dates, pricing, and the most updated list of available titles on our website, pd.bccpa.ca These webinars are also PD Passport valid – please refer to the course descriptions on the website for the number of passport days required, as sessions vary in length.

September 2017

Advanced Excel Functions and Formulas
Budgeting and Forecasting Tools and Techniques
Business Continuity - Best Practices for Managing the Risks
Emerging Technologies
Extending the Power of Excel with Useful Add-Ins
Implementing Password Management and Data Loss Prevention Tools for Better Security
Ransomware - Reducing Your Risk
Business Intelligence - Featuring Microsoft's Power BI Tools
Microsoft - Power Reporting for Free
Microsoft Power BI - Power Reporting for Free
Personal Technologies
QuickBooks for Accountants
Security - Power Reporting for Free
Technology Concepts for Decision Makers
The Best Kept Secrets of Windows 10
Top PDF Features You Should Know

October 2018

Advanced Excel Functions and Formulas
Advanced QuickBooks Tips and Techniques
Cloud Computing
Evaluating Technology Controls
Excel Tables and Data Models
Five Common Sense Steps to Secure Your PC Webcast
Implementing Internal Controls in QuickBooks Environments
Introduction to Excel Macros
Mastering the Excel Data Model
Office - Power Reporting for Free
QuickBooks Online and Other Top Accounting Software for Small Businesses
Ransomware - Reducing Your Risk
Remote Access Best Practices Webcast
Securing Your Data
Tales of True Tech Crimes: Ripped from the Headlines

November 2018

Accessing and Cleaning Data with Excel, Power Query, & Power BI
Advanced Excel Functions and Formulas
Budgeting and Forecasting Tools and Techniques
Business Continuity - Best Practices for Managing the Risks
Business Intelligence - Featuring Microsoft's Power BI Tools
Cloud Computing
Emerging Technologies
Excel Best Practices
Excel Data Models, Combinations, and Consolidations
Excel Tables and Data Models
Excel Tips and Tools for Better Budgets
Extending the Power of Excel with Useful Add-Ins
Filtering the World
Mastering the Excel Data Model
QuickBooks for Accountants
Small Business Internal Controls
Tales of True Tech Crimes: Ripped from the Headlines

December 2018

Advanced Excel
Advanced QuickBooks Tips and Techniques
Budgeting and Forecasting Tools and Techniques
Business Continuity - Best Practices for Managing the Risks
Data Analysis with Power Pivot
Excel Best Practices
Excel Data Magic, Including Advanced PivotTables and Power Pivot
Extending the Power of Excel with Useful Add-Ins
Five Common Sense Steps to Secure Your PC Webcast
Implementing Internal Controls in QuickBooks Environments
Introduction to Excel Macros
Microsoft Power BI - Power Reporting for Free
Office - Power Reporting for Free
Personal Technologies
QuickBooks
QuickBooks Online and Other Top Accounting Software for Small Businesses
Remote Access Best Practices Webcast
Revolutionizing Small-Business Accounting Webcast
Securing Your Data
Security - Power Reporting for Free
Small Business Internal Controls, Security, and Fraud Prevention and Detection
Technology Update
The Best Kept Secrets of Windows 10
Top PDF Features You Should Know

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 & analysis (FP&A), corporate development, treasury, investor relations, and capital markets. The following archived webinars are available to CPABC members at a special price and are also PD Passport valid. Visit our website at pd.bccpa.ca for more details on the courses

Available Titles

Math for Corporate Finance — Level 1

This course demonstrates how a number of mathematical formulas can be used to conduct detailed analysis on a set of data and/or variables.

$60 1/3 Passport Day 2 CPD Hours

Financial Analysis Fundamentals — Level 1

This course demonstrates how you can perform a financial analysis on any organization using a wide variety ratios derived from its financial statements.

$120 1/2 Passport Day 2 CPD Hours

Financial Modeling Fundamentals — Level 1

This series provides tips and tricks for Excel model builders, gives advice on how to audit your financial models, demonstrates how to use better formulas, and shows you how to monitor and handle uncertainty using scenario planning.

$180 2/3 Passport Day 4 CPD Hours

Budgeting and Forecasting — Level 2

This interactive and applied course will enable participants to adopt a disciplined approach to developing budgets; forecast results with quantitative and qualitative methods; effective use variance analysis to track performance; and present results with charts and graphs.

$250 1 Passport Day 4 CPD Hours

Building a Financial Model in Excel — Level 2

This series guides you through how to apply a structured approach to financial modeling in Excel. It covers the many hallmarks that make financial models robust; demonstrates best practice techniques in planning model structure; and explains how to forecast the income statement from operating revenues down to operating profit.

$250 1 Passport Day 4 CPD Hours

Business Valuation Modeling — Level 2

This business valuation course provides participants with the skills needed to perform detailed business valuation modeling using three main methods: Comps, Precedents and DCF Analysis.

$180 2/3 Passport Day 4 CPD Hours

Rolling 12-Month Cash Flow Forecast — Level 2

Learn to build a cash flow model from scratch complete with assumptions, financials, supporting schedules and charts.

$180 2/3 Passport Day 4 CPD Hours

Behavioural Finance Fundamentals — Level 2

In this course, you will learn about the wide range of decision making biases and information processing errors that influence our financial decision making.

$90 1/3 Passport Day 2 CPD Hours

Excel Dashboards & Data Visualization — Level 3

This in-depth course will teach you how to build a custom Excel dashboard using professional data visualization techniques. By the end of the course you will have a solid understanding of how to tell a story by combining data, charts, graphs, and other visuals.

$90 1/3 Passport Day 2 CPD Hours

Sensitivity Analysis for Financial Modeling — Level 3

This advanced financial modeling course takes a deep dive into sensitivity analysis. By the end of this course you will have a through grasp of how to build a robust sensitivity analysis system into your financial model.

$90 1/3 Passport Day 2 CPD Hours

Financial Modeling Using VBA — Level 3

This course provides participants with the skills needed to incorporate Visual Basic for Applications (VBA) into financial models.

$180 2/3 Passport Day 3 CPD Hours

eCommerce Financial Model & Valuation — Level 3

In this course you will learn to build a startup financial model from scratch complete with assumptions, financials, valuation, and output charts.

$250 1 Passport Day 4 CPD Hours

Mining Financial Model & Valuation — Level 3

In this course we work through a case study of a real mining asset by pulling information from the Feasibility Study, inputting it into Excel, building a forecast, and valuing the asset.

$250 1 Passport Day 4 CPD Hours

Advanced Excel Formulas — Level 3

Learn the most advanced formulas, functions and types of financial analysis to be an Excel power user. This course builds on our free Excel Crash Course and is designed specifically for spreadsheet users who are already proficient and looking to take their skills to an advanced level.

$60 1/3 Passport Day 3 CPD Hours

Real Estate Financial Modeling — Level 3

Learn the most advanced formulas, functions and types of financial analysis to be an Excel power user. This course builds on our free Excel Crash Course and is designed specifically for spreadsheet users who are already proficient and looking to take their skills to an advanced level.

$250 1 Passport Day 4 CPD Hours

Mergers & Acquisitions – Advanced Modeling — Level 3

This advanced financial modeling course on mergers and acquisitions is designed for professionals working in investment banking, corporate development, private equity, and other areas of corporate finance that deal with analyzing M&A transactions.

$250 1 Passport Day 5 CPD Hours

ProDio Audio Learning Inc

CPABC is pleased to continue the innovative project with ProDio Audio Learning Inc. (ProDio), a Canadian Company based in BC. ProDio 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, fully produced audio-only courses that are engaging, concise and easy to listen to, testing your learning along the way. Course content includes expert interviews, interesting stories, sounds, 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. When purchasing ProDio courses through CPABC, you will be provided with a link to access your course via mobile app or web. Accessing your ProDio course on your smartphone will require you to download and install the ProDio mobile app which is available for free through the App Store and Google Play.

Available Titles

Acing Your Strategy: A Leader's Guide to Successful Planning

Presenter: Russell Cullingworth

LEVEL Intermediate

We all know about planning, and that we should plan, but do we really understand "Why" and "How" to plan effectively. Using real-world examples, case studies and discussion with experts, this 2-part audio course will provide an engaging and thought provoking look at why planning is so important and why most managers and leaders fail to plan effectively. Content includes: creating a pro-active planning culture that looks ahead; how planning should really work; creating a compelling vision for your business; strategy and strategic drift; why SWOT is seldom an effective planning tool; planning using Michael Porter's 5 forces; the Strategic Accountability Reporting (STAR) framework for planning; and accountants as your best early warning system.

$110 1/2 Passport Day 2 CPD Hours

Avoiding Identity Theft, Fraud and Cyber-Crime

Presenter: Kelley Keehn

LEVEL General |

This course teaches professionals how to protect themselves and their clients by recognizing and identifying the latest scams, threats and trends. You'll learn the red flags along with real case stories and examples, so you and your clients can better spot current and future scams. This course includes interviews with 10 experts to explore, in-depth, how to protect yourself from ID theft, how it starts, what the dark web is, how government and companies aren't safeguarding your info, (and neither are we at times), how to quickly laser in on cyber scams, stay safe online and so much more.

$110 1/2 Passport Day 2 CPD Hours

Leading Through Influence

Presenter: Russell Cullingworth

LEVEL Introductory-Intermediate

In the words of author and business coach Ken Blanshard, "The key to successful leadership today is Influence, not Authority". We talk to experts as we explore this concept of influence and why it is so important to long-term success in leadership. Content includes: What is influence and why is it important; emotional intelligence and influence; social management and the permission to influence; 5 influencing styles; push vs. pull leadership; and a practical model for influencing.

$110 1/2 Passport Day 2 CPD Hours

Leading the Digital Workplace

Presenter: Robert Gilfoyle

LEVEL Intermediate-Advanced

Digital technology (DT) is driving massive change in the workplace. Organizations of all types and sizes are investing in it to improve collaboration, increase productivity, and transform the customer experience. This unique audio-only course covers the most critical knowledge and skills needed to become an effective 'digital leader' – someone who can thrive in a leadership role in this new and challenging environment.

$110 1/2 Passport Day 2 CPD Hours

Lies, Alternative Facts and Professional Skepticism

Presenters: Brian Friedrich & Laura Friedrich

LEVEL Intermediate

When you read a headline online that says "Insanity: The Word 'Man' Is Banned At Princeton University," do you immediately think "That goes too far!"? Or is your first reaction "Really? That sounds like an author writing a sensational headline to generate traffic to their article."? As professionals, our clients and the public in general count on us to be the "voice of reason" and to show a healthy amount of skepticism. In this session, we'll examine and de-bunk common examples of ways to present questionable or misleading messages. We'll talk about how to spot deceptions and out-of-context illustrations, and how to apply critical thinking to ask probing questions and sharpen our responses. This seminar contains 2 hours of ethics content.

$110 1/2 Passport Day 2 CPD Hours

Promoting Employee Engagement

Presenter: Monica Affleck

LEVEL Intermediate-Advanced

There can be little doubt that employee engagement is an important issue for those in Human Resources Management and in leadership roles, and it is a topic of conversation in many organizations today. Companies struggle with financial pressures and are trying to improve performance with fewer resources. Having committed and high-performing employees who freely give their discretionary effort is of critical importance; in fact, it is a competitive advantage that can set your organization apart from the competition. In this mobile audio course, you will learn about employee engagement best practices that you can apply directly in the workplace to help raise engagement levels in your organization.

$110 1/2 Passport Day 2 CPD Hours

Conversations in the Boardroom, Conversations in the Hallway

Presenters: Brian Friedrich & Laura Friedrich

LEVEL General

Building a strong ethical culture doesn't just happen – it requires purposeful attention to set and maintain a tone at the top that represents a genuine commitment to corporate and individual responsibility. This tone also needs to permeate throughout all levels of the organization and lead to confidence in making decisions that reflect ethical values. In this two-part session, we'll explore decision-making in the boardroom and in the hallway, and look at ways to enhance an ethics-based culture no matter what your role is. We'll also explore the International Ethics Standards Board for Accountants' proposed broadening of professional skepticism and judgment guidance for professional accountants, and how skepticism is a key part of the judgment we need as professionals to meet our ethical obligations under the CPA Code of Professional Conduct. This seminar contains 2.5 hours of ethics content.

$110 1/2 Passport Day 2.5 CPD Hours

CPABC FALL PACIFIC SUMMIT | SEPTEMBER 26-28, VICTORIA

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Seminar Leaders

We are proud to introduce our instructors for the Fall/Winter 2018 PD Program. We thank these committed professionals for the time and talent they contribute to our seminars. If you, or someone you know, would be interested in developing or teaching a seminar, please contact:

Simone Leonard, CPA, CGA
Vice President, Education and Professional Development
Email: sleonard@bccpa.ca

ASIF N. ABDULLA, JD is a tax lawyer at the Vancouver office of Thorsteinssons LLP, practicing primarily in the area of domestic and international tax planning for individuals, trusts, corporations, partnerships and other private enterprises. Asif's practice is focused on advising individuals and businesses in respect of succession and estate planning, tax-driven corporate reorganizations, immigration/emigration tax planning, business structuring and cross-border tax planning. Asif acts for a number of clients who are in dispute with the CRA and provides advice in respect of the Voluntary Disclosure Program.

BRUCE ACTON, FCMC, MBA. Bruce's expertise includes business process redesign, strategic planning and performance measurement. He has won a number of awards with his clients for his consulting work. He brings a broad background consulting to not for profits, the private and public sector.

LIETTE BATES-EAMER, CPA, CA is a Partner with KPMG. Liette has significant experience in providing audit services to public sector and not-for-profit organizations, managing engagements both large and small in scale. She is a member of KPMG's BC Public Sector/Not-for-Profit Network and KPMG's National Not-for-profit Network. Her community involvement has included serving as Treasurer for the Victoria Women's Transition House Society for 6 years and serving as a Community Advisor to the Victoria Foundation. She is currently the Treasurer for Habitat for Humanity Victoria.

TARA BENHAM, FCPA, FCA is a tax partner with Grant Thornton LLP. Tara has been in public practice since 1993 and has specialized in corporate and personal tax matters since 1997. Her practice encompasses complex tax analysis, planning and compliance particularly for small and medium size enterprises. Much of her work is focused on structuring related to buying and selling businesses, estate and succession planning. She also has extensive experience with all financial aspects of matrimonial negotiations and settlements.

KARINE BENZACAR, MBA, FCPA, FCMA, CFA is a seasoned industry professional with over 20 years of industry experience. After beginning her career in the finance departments of Avon Products and Kraft Foods, she held Senior Management positions at three major Canadian Banks – Royal Bank of Canada, Bank of Nova Scotia, and Bank of Montreal. Her career has spanned many functional areas including accounting, finance, capital markets, project management, re-engineering, and strategic management. She has performed consulting work, developed financial courses, and trained thousands of professionals from a wide variety of industries.

ANTOINE BISHARA, CPA, CA, CFA is Vice President of Business Development for Learning Strategies Group in the US. Antoine has over 12 years of experience as a finance professional, and focuses on creating specialized Excel models used for analyses, M&A, project finance, financial management and financial derivatives. Prior to joining LSG, Antoine worked on numerous projects, including the issuance of a $1BN high-yield bond; project financing for renewable energy assets totaling $200M; and structuring and managing a derivative book valued at more than $3BN.

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.

LAIRD BRANHAM, CPA, CA, is a director of Branham & Company Chartered Professional Accountants Ltd. Laird's primary area of interest is tax planning for private corporations and their shareholders, including restructurings, mergers, dispositions, and acquisitions. He has previously authored and presented seminars for BCCPA.

SHANE M. BROWN, LL.B., is a partner of Thorsteinssons LLP. Shane's practice focuses on domestic and international tax planning for individuals, trusts, corporations and charities, including: estate planning, corporate reorganizations, divisive reorganizations, business structuring, property acquisitions and offshore and cross-border structures. Shane also advises non-residents, including new immigrants to Canada, and represents clients who have disputes with the CRA. Shane is a regular lecturer for the CPABC and lectures on various aspects of taxation law and has authored and co-authored papers and articles on a variety of tax planning matters.

GREGORY BUCK, CPA, CA, BCOMM, has been in public practice for 39 years specializing in owner managed and professional business. He has extensive experience in small to medium businesses from a practical standpoint. Greg has lectured extensively at UFV in the Business Computing and Business Administration departments and for accounting and work flow software companies. Greg has authored three textbooks in the business computing area and several articles and blog.

RHONDA CALDWELL is the founder of Caldwell Communications Inc., a Vancouver based management consulting and professional development company. As a business owner with over 20 years of corporate and entrepreneurial experience, Rhonda offers real world solutions that are immediately applicable. She has provided services to organizations across North America as a consultant, training designer, classroom facilitator and coach. She focuses on giving people the skills they need to enhance their personal and team performance, and strengthen their business relationships with colleagues and clients.

GREG CAMPEAU, B.COMM, is a learner and teacher of timeless truths that govern both personal and organizational effectiveness. Greg has delivered over 2900 presentations and workshops throughout North America, and for 15 years has instructed courses in the School of Business at BCIT. Greg's broad and riveting appeal is rooted in his relevant, meaningful, thought-provoking and practical content that is always delivered in an interactive, humorous and inspirational style.

JAMES CAPOBIANCO is a partner at PwC's Vancouver practice and leads PwC's Indirect Tax Practice for Vancouver. Specializing in Canadian indirect taxes for over 25 years, James has expertise in the Goods and Services Tax/Harmonized Sales Tax, Quebec Sales Tax, and retail sales tax relating to cross-border transactions, technology companies, life sciences companies and public sector bodies. He has also been a regular part of the faculty team for the CPA Canada In-depth GST/HST Course, and co-developed and routinely co-presents CPA Canada's Advanced GST/HST Course for Public Sector Bodies.

LOUIS CHANG, CPA, CA holds a TESOL English Teaching Diploma, and for over 20 years has taught English to adult professionals and students at various institutions including The English Language Institute at UBC, the YMCA, Immigration Canada, Mosaic, and other Business Language schools throughout Vancouver. He has worked in public practice in the Vancouver office of Deloitte, and for over 30 years has owned and operated a successful business. Louis believes that the ability to speak confidently and clearly is essential for success in the accounting profession.

MIKE COBURN, BA(HON), LL.B., is a partner with Fasken Martineau DuMoulin LLP and a member of the firm's tax group. He has considerable experience in structuring and implementing tax-efficient corporate reorganizations for both private and public companies. Mike also frequently advises clients on inbound and outbound cross-border investments, acquisitions and disposition of assets and disputes with various taxing authorities.

BILL COX, FCPA, FCA has been a partner with BDO Canada LLP for over 25 years. He has worked exclusively in the public and not-for-profit sectors dealing with financial statements audits, as well as audits of government grants and other specialized audits. He has been a member of CPABC'S Government Organizations Accounting and Auditing Forum for 25 years. For the past 5 years he has been a member of the Public Sector Accounting Board.

RUSSELL CULLINGWORTH, MBA is the founder and CEO of ProDio Audio Learning and EQAdvantage Learning and Development Inc. Russell's courses focus on improving business performance through advanced interpersonal skills. Corporate clients include the Salvation Army, Great Little Box Co., Vancouver Film School, David Suzuki Foundation, Trevor Linden Fitness, and Scouts Canada. He has over 20 years' experience in financial management, and has held executive finance positions at CGA-Canada and Canuck Place Children's Hospice. Russell has an MBA from SFU and is an Accredited Insights Discovery Licensed Practitioner.

ROBIN DIEHL, CPA, CA, CBV is a business valuator and a business analyst. Robin has vast experience presenting internal and external courses, including courses for undergraduates, professional designations and private firms. She has helped author various accounting courses and composed professional examination questions. Her areas of focus include financial accounting, financial reporting and assurance topics.

DWAYNE DUECK, CPA, CA, is a tax partner at Tenisci Piva LLP in Kamloops, B.C. Dwayne specializes in private corporation tax and business advisory services, including providing tax advisory services to other professionals. His tax practice encompasses business, corporate, personal, and trust taxation, estate and succession planning, the acquisition and sale of a business, mergers, amalgamations, and corporate reorganizations. Dwayne has been a tutor and facilitator for CPA Canada's In-Depth Tax program since 2006 and has been a member of the Canadian Tax Foundation for 14 years.

KEVIN DUXBURY, CPA, CA has extensive experience with Canadian-based public and private companies that have operations in the United States. Kevin specializes in providing US corporate tax advice that integrates with Canadian tax rules. Kevin frequently advises on the taxation of cross-border mergers and acquisitions including tax structuring and tax due diligence. He has also advised on the formation of numerous private real estate funds and debt funds. His clients include leaders from the real estate, mining, bio-tech, agricultural (greenhouses) and financial sectors.

KEVIN ECK, P.ENG., MBA, is a Partner in the Business Tax Incentives Practice and the Western Canadian Practice Leader. He provides technical expertise to mining, forestry, manufacturing, technology, biotech and oil & gas clients in helping with SR&ED and other incentives claims. Kevin also acts as Ernst & Young's SR&ED Mining Industry Leader in Canada and consults with companies in Western Canada on greenhouse gas verification requirements and offset reduction credit programs.

SHARON EDWARDS has been teaching clients how to share their expertise with confidence, passion, and influence for 15 years. She is a presentation skills coach, facilitator, and writer who fosters innovation and creativity through great communication. The theme that runs through her work is clear: being a great communicator is the way to get the highest return on the investment you have made in yourself and your career. Sharon will help you strengthen your confidence, presence, and influence.

MICHAEL ELL, FCPA, FCGA, is a Public Practitioner and Consultant. Michael was the Primary Public Practice Reviewer for CGA-BC from 1999 to 2015, is an Associate of the CPA Canada Accounting Standards Board Private Enterprise Advisory Committee, and a member of the CPA Canada Practitioners Technical Advisory Board. He develops and facilitates courses on public practice issues, accounting standards, and the CPA Canada Handbook for the accounting profession. Besides providing services to small business clients, he focuses on providing monitoring, mentoring and standards consulting to accounting firms in BC and across Canada.

ALEX FARRELL, CPA, CA, is a Senior Manager in the Assurance practice of KPMG with a focus on high tech and public companies. Alex has experience in providing a wide range of assurance services including audits, regulatory filings, and accounting advisory services to companies in the tech sector. He has 8 years of industry experience in analyzing and providing advice in regards to revenue recognition issues within both early and late stage companies of the tech sector. Alex's experience includes working with companies reporting under U.S. GAAP, ASPE and IFRS.

LAURA FRIEDRICH, MSC, FCPA, FCGA is a principal of friedrich & friedrich corp, a professional research, standards, and education consultancy firm. The firm has over 20 years experience conducting projects throughout North and South America, Asia, and Eastern Europe. Major projects focus on organizational structure, program construction, and evaluating, designing and advising on best practices in competency-based education and experience assessments. Laura has led hundreds of professional development sessions in a wide range of topic areas including governance, leadership, ethics, project management, curriculum and exam development, and IFRS and ISAs.

ANDREA FRISBY, TEP, Legacy Tax + Trust Lawyers, focuses her practice on assisting clients with estate and trust planning and administration. She prepares wills, trust documents, powers of attorney and representation agreements for clients, and also provides legal advice on estate and trust administration. Andrea has authored numerous papers in the areas of wills, estate, trusts and capacity issues and is a frequent speaker on these topics.

DAVID GAUTIER, CPA, CA is an Associate Partner with Crowe MacKay's tax group in Kelowna. David provides tax and advisory services to privately held businesses. David has assisted in a number of significant private company sales and also advises in wide range of corporate, personal, trust and estate tax planning matters.

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TERRY GUNDERSON, CPA, CA, recently retired as a partner with Manning Elliott LLP where he established many years of auditing, financial accounting and tax experience with a wide range of clients. He was a member of Manning Elliott's Quality Control and Accounting Standards committees, and acted as leader for the firm's quality monitoring program. Terry has given seminars on Canadian auditing and assurance standards, IFRS, ASPE and ASNPO in recent years.

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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.

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ALVIN LUN, J.D. practices tax law at Thorsteinssons LLP in Vancouver. His practice focuses on domestic and international tax planning for individuals, trusts, and corporations, as well as representing taxpayers in their disputes with the Canada Revenue Agency. Alvin is fluent in Cantonese and Mandarin Chinese. Prior to joining Thorsteinssons, Alvin completed a judicial clerkship at the Tax Court of Canada and articled at a national law firm.

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JOE MARCHELLO, CPA, CA, CFP, has been in the accounting and finance industry since 1990 and is a Member of the Chartered Professional Accountants of Ontario and a Certified Financial Planner. Joe obtained his designation specializing in accounting and tax with the accounting firm Horwath Orenstein (now known as MNP). In his early years he achieved a background in the Wealth Management and Manufacturing industries and since 1998 has had extensive real estate experience with Industry leaders such as Tridel developments overseeing financial, operational, technological and business development for $100 million revenue plus per year organizations.

THE MARQUEE GROUP is the leading Canadian provider of financial modeling training programs at financial institutions, corporations, universities and professional societies. Since 2002, The Marquee Group has provided financial professionals with the tools they need to understand and master critical areas of financial modeling, valuation and analysis. The firm's partners are Ian Schnoor, Tim Benson, Dave Thomas and Jon Zelman. They have led courses in Canada, the United States, the United Kingdom, Australia and Mexico. They each have significant experience working in capital markets and a passion for teaching.

LESLEY-ANN MARRIOTT, PCC, CEC holds the advanced credential of Professional Executive Coach. As a former executive, she developed her skills in the competitive world of the big box retail business at the senior leadership table. She has invested 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

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MASSOOD OROOMCHI specializes in the design and implementation of internal control programs, corporate governance practices, enterprise-wide risk management, accelerated financial close, effective spreadsheet controls, and strategic procure to pay and order to cash processes. He has developed comprehensive top-down, risk-based solutions that can easily be customized to any organization. He also specializes in assisting the companies to transition from privately held to publicly traded environments. As a founding member of FinEx Group, his clients include a full range of organizations across all industries in North America and South America.

RON OSBORNE, CPA, CA, has over 40 years experience in public practice including over 25 years dealing specifically with commodity taxation matters. He has developed and taught numerous GST/HST & PST courses. His practice is focused on the provision of GST/HST and sales tax advice to other practitioners and their clients. Ron is also a member of the CPABC Taxation Forum.

MARK OSTRY, CPA, CGA, has worked in public practice since 1983. Early in 2002 Mark established a sole proprietorship in Westbank. He has experience in all levels of public practice, largely serving small-to-medium-sized enterprises. Mark has presented a variety of professional development courses over the years, including practice management, ethics and taxation.

JIM C. OTAR, is a retired financial advisor and a retired engineer. He is the author of several books, the latest one is "Unveiling the Retirement Myth - Advanced Retirement Planning based on Market History". His articles are published in various magazines in Canada, U.S. and Australia. He won the prestigious CFP-Board Award in 2001 and 2002 for his articles, the first Canadian to win such a prestigious award. He is the founder of www.retirementoptimizer.com.

JOHN PAGE CPA, CA directed all aspects of the Ethics program at TELUS Corporation for over 11 years. He led policy development, initiated training programs and the hot line, and reported to the Board of Directors and to external stakeholders. He has broad experience of applying ethical principles to organizational leadership, financial and risk management, and not for profit Board governance. He is currently an executive and organizational coach and a graduate of the UBC Certificate in Organizational Coaching.

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ANDREW TAYLOR, CPA, CA is principal of Andrew C. Taylor Inc, Chartered Professional Accountant, a Richmond based CPA firm practising exclusively in the area of taxation. He specializes in corporate reorganizations, purchase and sale of businesses and estate planning and has been a frequent lecturer and instructor for ICABC and CPABC for many years.

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LUCAS TERPKOSH, CPA, CA, CBV, CFF has extensive experience in the preparation of independent valuation reports and expert reports across a number of industries. He has valued and analyzed large public companies as well as shareholdings in closely held private companies. His valuation analyses have been used in the context of mergers and acquisitions, shareholder disputes, matrimonial disputes, financial reporting, and corporate reorganizations. Lucas has also presented frequently to various business and professional organizations regarding business valuation and related matters.

TRACY THEEMES, MA, CFP, FCSI, FDS, is Financial Advisor and co-founder of Sophia Financial Group, Raymond James. Prior to that, Tracy worked as a financial consultant with Smith Barney, a US brokerage firm and after returning to Canada was an advisor with a large bank owned investment firm. She has an M.A. in Counselling Psychology and is a Certified Financial Planner, insurance licensed and a Fellow of the Canadian Securities Institute. Tracy was recently awarded the International Alliance of Women Global 100 Award for her work in empowering women through education.

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.

DAVID TRAHAIR, CPA, CA, is a financial trainer, national best-selling author and CPA Magazine columnist. His books include Smoke and Mirrors, Enough Bull, Crushing Debt, Cash Cows, Pigs and Jackpots and his latest The Procrastinator's Guide to Retirement. Canadians appreciate the fact that his views are totally independent because he does not sell any financial products. He currently operates his own personal finance training firm and offers seminars on his books to organizations including CPA provincial institutes in B.C., Alberta, Saskatchewan, Manitoba, Ontario, New Brunswick, Nova Scotia and Newfoundland and Labrador.

SHAWN TRYON, LL.B. practices tax law at Thorsteinssons LLP in Vancouver. Shawn's practice focuses on tax planning for individuals, trusts and corporations in both domestic and international matters, including: estate planning, corporate reorganizations and business structuring. Shawn also deals extensively with tax litigation matters from the audit stage through to the appeal stage. Shawn received a BA in 2000 from SFU, an LLB in 2004 from UBC and was called to the British Columbia Bar in 2005. Shawn is a member of the Canadian Tax Foundation and the Canadian Bar Association.

NIC TSANGARAKIS is Principal at Kwela Leadership & Talent Management. Nic's extensive human resources expertise includes strategic planning, design and delivery of leadership and management development programs, design and implementation of performance management systems, implementing self-directed teams, and facilitating team building sessions. Nic also has experience in operations management and has implemented total quality management systems and business process re-engineering. Nic has an honours degree in Industrial Psychology, and a Masters degree in Operations Management from the University of Cape Town, South Africa.

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.

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WYNN VO, CPA, CA is a Senior Manager with KPMG Canada's International Corporate Tax practice in Vancouver. She has 12 years of professional experience, with 10 years specializing in Canadian tax. She has significant experience advising Canadian and foreign public companies, private enterprises and their stakeholders on a broad range of Canadian domestic, inbound, outbound, cross-border and international tax matters. Wynn works with clients in a multitude of industry sectors (including, technology, manufacturing, industrial markets, real estate and consumer services).

HELEN WALE, MA, CPHR, CEC is an Associate with Learning Strategies Group. She is an Associate Certified Coach and trainer facilitating workshops primarily in employee engagement and coaching. Prior to joining LSG, Helen spent over 26 years in generalist and leadership roles within human resources and organizational development in several organizations in both the UK and Canada. With a Bachelor of Arts degree in History, Helen is also Chartered Professional in Human Resources (CPHR), holds a Masters degree in Human Resource Management, a Graduate Certificate in Executive Coaching and is certified to deliver MBTI workshops.

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IAN WANKE, CPA, CA, CFA, CBV works within the Private Equity team at British Columbia Investment Management Corp. (bcIMC), where he and his colleagues invest in privately held, global companies. bcIMC is a Victoria based asset management firm with more than $120 billion of assets under management. Previously, Ian was a Vice President at Deloitte's Mid-Market Corporate Finance practice in Vancouver where he advised mid-market companies across a variety of sectors on acquisitions, divestitures, and financing. Ian has led several notable transactions in B.C. Prior to Deloitte, Ian was at a boutique private equity firm.

GARRETT WASNY, MA, CMC, CITP/FITP, is an award-winning Internet speaker, author, professional development technologist and former management consultant for Price Waterhouse. He's published three books, written hundreds of articles and columns on Internet strategy, and delivered more than 1,000 seminars and webinars to CPAs and accounting organizations worldwide on how to thrive online using the latest search, productivity, mobile and social tools.

SONJA WEISSENBACHER, CPA,CA, FEA (Family Enterprise Advisor™) is an entrepreneur at heart and coowner of the Northern Gifts Group of companies, a family business, and owner of Edendale Business Consultants. As a principal consultant of Edendale, Sonja works closely with family businesses focusing on financial turnarounds, business reorganizations, change management and intergenerational transitions. Drawing from her personal lifelong experience in family businesses located in Canada and the US, Sonja brings passion and a unique blend of skills in helping her family business clients achieve business success and family harmony.

WILLIAM (BILL) WESIOLY, CPA, CMA is an independent Risk Management consultant and professional Leadership coach. He is an enthusiastic and accomplished leader whose goal is to enrich the effectiveness of people and organizations, with both skill and heart. Prior to becoming an independent consultant, he worked in the financial services industry holding leadership roles of increasing responsibility, first with BMO and then with RBC. His main area of focus was in the field of Risk Management where he successfully built and led risk management programs such as Risk and Control Assessments and Operational Risk Scenarios.

TYLER WIER has expertise in training and facilitation, coaching, people and leadership development, employee engagement, leading and managing change. Before joining Kwela, highlights of his nearly 20-year career include consultation for a global training provider and a global automotive brand, as well as leading an internal change management consulting function within a large government organization. Tyler has a Bachelor of Arts degree in Philosophy (Occupational Ethics specialization), a certificate in Adult Learning, a Bachelor of Education degree, a Graduate Certificate in Executive Coaching (Royal Roads University), and a Professional Certified Coach (PCC) credential from the International Coach Federation (ICF)

MARION WILLIAMS, a Senior Associate with K2 Enterprises Canada since 2009, provides consulting and training services throughout Canada. With a background in the insurance industry, Marion earned the FLMI designation with a specialty in Information Systems. As the owner of a computer consulting company in Ontario for over twenty years, Marion develops custom databases and automates Excel procedures for a variety of business sectors, using Access, Excel and VBA as required. In addition, Marion specializes in training all the Microsoft Office products at an advanced level.

DENISE C. WONG, CPA, CA is the Principal of a consulting firm focused on Organizational Change Management and Financial Systems Efficiencies. She facilitates strategic change and optimizes financial systems within organizations. Denise has been in Finance & Accounting since 2002 and has worked in various industries that include forestry, retail electronics, oil & gas shipping, real-estate, food, beverage & entertainment, manufacturing and mining.

TERENCE WONG, CPA, CA, CPA (ILLINOIS), is the Director of U.S. and Internal Tax at Kingston Ross Pasnak LLP. Terence is a successful tax advisor with almost 30 years of experience dealing with multi-national taxation issues faced by individuals and corporations. Being both a designated Canadian CPA and U.S. Certified Public Accountant allows Terence to provide advice and instruction on accounting and taxation related matters arising from both countries. He has been an instructor for more than a decade for various CPA bodies, allowing him to gain invaluable experience in contributing to the growth of young professionals.

HUGH WOOLLEY, CPA, CA, of Lewis & Company, specializes in income tax focusing on the reorganization of private Canadian companies. A former Revenue Canada Rulings officer, Hugh has authored several articles and is a frequent lecturer on income tax matters.

ALEX WRAY has over 25 years of experience as a trusted advisor, coach and facilitator of top teams and leaders throughout North America, and globally from Singapore to Switzerland. Alex has a passion to connect the science of habit change with the real-world context of performance. Central to his approach is the work of ground-breaking Harvard University Professors Bob Kegan and Lisa Lahey, and the phenomenon they describe as the Immunity to Change™. Alex has completed their highest level of certification.

KATHERINE XILINAS, LL.B. is an Associate Partner of Couzin Taylor LLP, and a member of the Bars of BC and Ontario. Katherine has extensive experience in the area of indirect tax, including GST/HST, provincial sales tax, excise tax and customs matters. Katherine has worked in both Vancouver and Toronto, where she has represented clients before the federal and provincial taxing authorities in the context of GST/HST, PST and customs voluntary disclosures, audits, adjudications, objections and appeals. She has also represented clients in appeals, judicial review applications and tax-driven rectification applications before various levels of court.

REGISTRATION FORM

Phone 604 872.7222 **Toll free** 1 800 663.2677 **Fax** 604 684.1267 **E-mail** pdreg@bccpa.ca
Website pd.bccpa.ca **Address** 800-555 West Hastings Street, Vancouver, BC V6B 4N6

REGISTRANT INFORMATION

❑ CPABC MEMBER ❑ CPABC STUDENT ❑ OTHER

NAME COMPANY

ADDRESS ❑ HOME ADDRESS OR ❑ COMPANY ADDRESS

CITY PROVINCE POSTAL CODE

PHONE FAX E-MAIL

Special Dietary Requirements: If you have allergies or need other special meal considerations, please let us know at the time you register, so we can make the necessary arrangements with the hotel catering staff. Allergies only, not preferences.

SEMINAR INFORMATION

CODE	DATE	SEMINAR TITLE	FEE
CODE	DATE	SEMINAR TITLE	FEE
CODE	DATE	SEMINAR TITLE	FEE
CODE	DATE	SEMINAR TITLE	FEE
CODE	DATE	SEMINAR TITLE	FEE

Confirmations will be emailed within 1 business day upon receipt of registration. It is the attendee's responsibiltiy to confirm their registration in the event they do not receive a confirmation. Refunds cannot be provided for failure to receive a confirmation. All PD seminars are subject to the Terms and Conditions as outlined on the next page.

PD Passport Holders:

❑ Flexi PD Passport
❑ Personal PD Passport

PD Passport No.

18 - ________________

SUB-TOTAL

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TOTAL

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TO ORDER A PD PASSPORT **(A savings program for people who take multiple PD Seminars - for more information see page 21 or pd.bccpa.ca)**

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NAME SIGNATURE DATE

PAYMENT

❑ Cheque Enclosed (payable to CPABC) Payment must accompany all registrations/orders.

PLEASE NOTE: Credit card information can now only be accepted by phone. Ensure you enter a valid phone number on the form and we will contact you. Alternatively, you can register online at pd.bccpa.ca or call CPABC PD at 604 872.7222

PD SEMINAR TERMS & CONDITIONS

REGISTRATION AND FEES: To register, complete and return the registration form with payment to the CPABC PD Department. Payment of seminar fees are due at the time of registration, as we do not invoice for seminar registrations. Cheques should be made payable to CPABC. We also accept Visa and Mastercard, but please DO NOT include your credit card information in any email correspondence. All registrations are subject to GST regardless of employer or employment status.

CONFIRMATION NOTICES: A confirmation notice will be emailed to the registrant within 1 business day upon receipt of registration. Online registrations should generate a confirmation immediately if the transaction was processed successfully. If you do not receive your confirmation prior to the course date, please contact the PD Department. The confirmation notice is provided as a courtesy – all assessments apply whether or not a registrant receives a confirmation notice.

SEMINAR LOCATIONS AND DATES: Seminar locations and dates are subject to change. Every effort is made to ensure that current information is available. Please check the PD website at pd.bccpa.ca for the latest information on the status of seminars.

SEMINAR REGISTRATION CANCELLATIONS, TRANSFERS & REFUNDS: All cancellations and/or transfers must be received in writing. Telephone notifications will not be accepted. Cancellations/transfers received at least 10 calendar days prior to the seminar date will result in a full refund. Cancellations/transfers received less than 10 calendar days but more than 2 full business days prior to the seminar date are subject to an administration fee of $50 for full and half-day seminars, or $25 for executive breakfasts and other 2-hour seminars.

Registrants who do not show up for a seminar, and/or who do not notify CPABC PD in writing at least 2 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. For free PD seminars a "no-show" fee will apply. 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. Please refer to respective program policies on our website.

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 a last minute scheduling problem, we reserve the right to substitute a fully qualified speaker who is not listed in the course description.

MEALS: Unless otherwise stated, lunch and coffee breaks are provided at full-day seminars, breakfast is provided only at executive breakfast seminars, and only coffee breaks (not lunch) are provided for half-day seminars. If you have allergies or special meal considerations, please let us know at the time of registration.

CLASS LIST

CPABC may distribute classlists with your name and organization name at the seminar. Should you wish to opt-out, you must email pdreg@bccpa at least one week prior to the course date.

VIDEO/PHOTOGRAPHY

CPABC may occasionally audio record sessions or take photographs at seminars. Recordings and images may be edited and distributed in educational and promotional products.

WEB-BASED SEMINAR TERMS & CONDITIONS

The registration fees for web-based 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 web-based seminar, no refunds or substitutions will be granted.

PD PASSPORT TERMS & CONDITIONS

GENERAL CONDITIONS APPLYING TO ALL PD PASSPORTS

All 2018-2019 PD Passports are valid on CPABC PD passport valid seminars taking place between September 1, 2018 to August 31, 2019. They cannot be used to register for seminars or order products beyond the expiry date. Any unused portions of the PD Passports cannot be refunded, credited, or carried-forward.

PD Passports may not be used until payment is received in full, and may not be used retroactively for courses (or products) taken (or ordered) prior to their purchase. No other discount program may be used in conjunction with the PD Passports.

The PD Passport program is valid for CPABC PD sponsored seminars only. Some CPABC PD programs (e.g. CPABC Executive Programs) are passport invalid. The PD Passport is also invalid towards CPABC conferences that are not organized under the PD Program.

TRANSFERABILITY

Personal PD Passport – not transferable; only the holder can attend seminars using their Personal Passport.
Flexi PD Passport – this is the only type of PD passport that is fully transferable.

FLEXI PD PASSPORT – OFFICIAL CONTACT PERSON

For Flexi Passports, you must designate an individual as your official passport contact person. This individual, and no other, will be authorized to receive information on the passport usage, including registration details made under that passport. Individuals who register for seminars using the Flexi PD Passport are providing consent to share that registration information with the official passport contact person of that Flexi PD Passport.

SEMINAR CANCELLATIONS

(Applies to all PD Passports)
All cancellations or transfers of registration under PD Passports must be received in writing. Telephone notifications will not be accepted. Cancellations/transfers received at least 10 calendar days prior to the seminar date will not result in a penalty. Cancellations/transfers received less than 10 calendar days but more than 2 full business days prior to the seminar date are subject to an administration fee of $50 for full and half-day seminars, or $25 for executive breakfasts and other 2-hour seminars, but the portion of the PD Passport used to register for the seminar will be restored. If the cancellation fee is not paid, the PD Passport portion will be forfeited instead.

Registrants who do not show up for a seminar, and/or who do not notify CPABC PD in writing at least 2 full business days prior to the seminar date (statutory holidays are not considered business days) will be assessed the full PD Passport portion of the seminar. There will be no transfers, credits, or carry-forwards – the portion of the PD Passport used to register for the seminar will be forfeited.

PD PASSPORT REFUNDS

There will be no refunds issued for PD Passports once your order has been processed. Please ensure that you evaluate and understand the type and terms of the PD Passport you are purchasing. Refunds will not be provided for unused passport days.

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