CPA
CHARTERED PROFESSIONAL ACCOUNTANTS
BRITISH COLUMBIA

Professional Development

Take flight

2019/2020

FALL I WINTER

Professional Development Programs

Beyond a classroom. Elevate your skills, advance your career.

CPABC Professional Development believes that education is lifelong, and strives to provide our diverse membership opportunities to develop both technical and enabling skills. To that end, we currently offer over 250 seminar titles exceeding 800 offerings each year. Additionally, we have designed specific programs focused on elevating your career. Because learning is life-long, your CPABC PD Program is positioned to help you continue to move forward.

CPABC Executive Programs

Executive Programs are multi-day, interactive, in-depth, and in-residence programs geared towards aspiring leaders, Senior Managers, Controllers, and CFOs. Experienced facilitators guide you through the learning curriculum, as you reflect on learning outcomes and develop actionable plans.

New this fall: The CEO Program, and The Optimal Negotiator

CPABC Nexus Days

PD Nexus Days are themed, conference-format seminars with multiple short sessions throughout the day. Highly regarded speakers who are experts in their fields present timely and relevant information, while attendees receive an opportunity to network with peers.

New this fall: Business Insights Kelowna, Beyond Financial Reporting Insights and for our public practitioners the Public Practice Insights including tradeshow.

CPABC Certificate Programs

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

New this fall: Advanced Strategic Management Planning Certificate Program which deepens learning from the pre-existing SMPC program.

CPABC PD Passports

Interested in the above, or in our other 250 seminar titles, including Ethics, Assurance, Tax, Technology and so much more….but need a more cost effective route to acquire quality PD? Purchase a CPABC PD Passport which provides substantial savings! All seminars, with the exception of the Executive Programs, are PD Passport eligible.

Purchase a Passport at the early bird price and potentially save up to 40%!

General Information

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.

PD Passports

PD Passports are a great way to save on your professional development training costs! We have wide selection of seminars scheduled between September 2019 and August 2020, so consider purchasing a PD Passport to enjoy substantial savings. Our Fall/Winter program, which runs from September to March is covered in this catalogue, while our Spring/Summer program will be covered in the next issue published in March. See page 7 for details on the PD Passports.

Seminar Levels & Naming Conventions

See page 3 for a definition of seminar levels, and explanations of our naming conventions to assist you in selecting the appropriate seminar for your needs.

Paperless PD

See page 2 for more important information on paperless seminar materials which were introduced in our program this past spring. While registrants will receive electronic copies of their course materials (where available) at no additional cost, a nominal fee will be added for print requests.

New Seminars for Fall 2019

Accounting & Assurance

ASNFPO – Update 2019
ASPE – Construction Industry
ASPE – Update 2019
Marketing Your Business Without Breaking the Bank
PSAS – Update 2019

Information & Business Technology

Cyber Security and Awareness
DAX Formulas for PowerPivot

People Management & Personal Development

Achieving Results Through Collaborative Projects
Creating Healthy Conflict in the Workplace
Enhancing Your Management Skills
Emotional Intelligence in the Workplace
Ethical Leadership in an Age of AI
Leaders as Role Models
Leading Sustainable Change: Make it Happen
Managing Transitions: Leading the People Side of Change

Strategy, Governance, Risk & Human Resource

Advanced Strategic Management Certificate: Links
Advanced Strategic Management Certificate: Maps
NFPO – Governance

Taxation

An Introduction to FAPI
Corporate Tax – Investment Holding Companies
Income Tax – Principal Residences
NFPO – Taxation
PST – Review of Jurisdictional Sales Tax
Tax Issues in the Sharing Economy
US Tax Reform – Implications for Canadian Businesses

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.

Friendly reminder

2 Days Before: Download material, open and review ability to make notes in PDF

1 Day Before: Fully charge your device

Day of seminar: Materials are ready to go – happy learning!

Paperless Seminar Materials & Online Services

Paperless seminars have finally arrived! The majority of CPABC PD seminars will now provide electronic course materials. Some seminars will continue to have a print copy option available subject to a nominal printing fee. Registrants interested in paper, can order a printed copy at the time you register for a seminar.

With the move to paperless, we strongly encourage attendees to bring a fully charged electronic device (laptop, tablet, iPad) pre-loaded with the paperless course material, *especially when attending seminars of a more technical nature.* Without access to the materials in class, you will experience a decrease in the effectiveness of your learning.

Frequently Asked Questions

Why go paperless?

In response to the growing popularity of the digital storage of materials, and in conjunction with an enhanced Online Service Portal for CPABC PD, we expanded our paperless initiative to

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

Does the seminar registration process change?

To order a printed copy of the seminar materials, you will need to select that option (if available) when you register. Beginning with our Fall/Winter program in September 2019, the opt-in for printed seminar materials will be subject to a nominal printing fee.

Are all seminar materials going to be paperless?

A small number of seminars, including Executive Programs, may still require printed materials. In these cases, we will continue offering the course materials in printed form at no additional cost. Electronic copies of such seminar materials may not be available.

Do all seminar materials have a print option?

When the paper count is low, seminars will be paperless only with no print option, but you are free to print a copy yourself.

How do I access my paperless course materials?

Your paperless course materials will be available in your **Online Services** account. Log in to your account, go to the **Professional Development** tab (green bar at the top) then **Registration History and Material** (menu on the right). The material will be available under **Upcoming Seminars**.

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

You will now have access to the course materials, through download, **2 business days** prior to the seminar start date and for up to **1 month** post seminar date.

What type of files will I have to download? What is a zip file?

Your paperless course materials will be in a zipped file. A zip file is a file format that compresses multiple files into a folder and is commonly used to share files over the Internet – although course materials will most often be in PDF format, some may contain Word and/or Excel files as well. After you have downloaded the zip file, you will have to 'unzip' the files and folders that are compressed inside. Locate where the zipped folder was saved on your computer after downloading, then do one of the following: Open the zipped folder by double-clicking it, then drag the file or folder from the zipped folder to a new location; Right-click the zipped folder, select Extract All, and then follow the instructions.

Can I access the materials on a mobile phone or tablet?

We do not recommend using your mobile phone. While tablets/iPads are recommended, you may first need to install an app (there are various free apps) that will allow you to unzip your file directly on your tablet/iPad. Alternatively, you can download and unzip the file first on your desktop/laptop and then copy/send the file over to the device you plan to bring with you to the class.

What should I bring to the course?

Prior to attending the seminar, ensure you have a **fully charged** electronic device (laptop/tablet/iPad) **preloaded** with the course materials – power outlets may be limited at the course venue, and while WiFi is available, we cannot guarantee the quality of internet access nor provide technical support. You may also bring your own printed copy if that is your preference.

Can I edit or make notes on the electronic materials?

PDF files are password protected, so while you will not be able to edit the content of the material, you will be able to annotate and make comments. Visit our website for tips on how to annotate PDF files.

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.

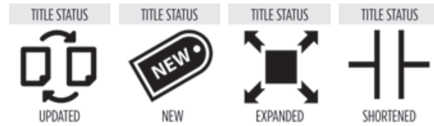
Fundamentals – examines the key foundational topics of a subject area. Common knowledge of the subject area is required.

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.

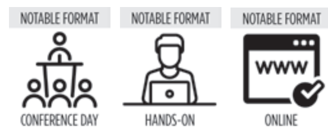
Advanced – provides a deeper examination of the significant standards or concepts in a subject area than a fundamental, or essentials course. Fundamental knowledge of the subject area is required.

Seminar Icons - Legend and Definition

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

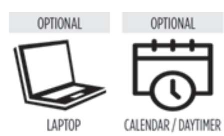


Notable Format – will indicate if the course will be taught in a format other than standard classroom, lecture.



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.



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

Seminar Material – will indicate if the course material is paperless or in hard copy

Accounting & Assurance

Audit & Assurance

Financial Reporting

Management Accounting & Financial Management

Finance

Information & Business Technology

People Management & Personal Development

Communication & Negotiation

Problem-Solving & Decision-Making

Professional & Ethical Behaviour

Self-Management

Teamwork & Leadership

Public Practice Management

Strategy, Governance, Risk & Human Resource

Strategic Management Certificate Program

Advanced Strategic Management Certificate Program

Taxation

Wealth Management

PD Nexus Days

Executive Programs

Web-Based Learning

Seminars with Ethics Content

Eligible ethics hours are in brackets

Accounting & Assurance

Professional & Ethical Behaviour

Strategy, Governance, Risk & Human Resource

Taxation

Executive Programs

Note that some of our web-based learning titles may also contain ethics hours – see individual title descriptions for more information.

CPABC
PD Passports

Personal PD Passport & Flexi PD Passport

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 held between September 1, 2019 and August 31, 2020 at no extra cost. You can mix and match executive briefs (3 executive briefs are equal to 1 day), half-day, one-day, and two-day seminars to equal 6 days of PD training – potentially saving you 40% or more off seminar prices.

The 2019-2020 PD Passports are valid on seminars held between September 1, 2019 through to August 31, 2020 only.

Personal PD Passport - $1,650+GST
Early Bird Price - $1,450+GST (purchase by Sep 9, 2019)

For individual, designated CPABC members. This type of PD Passport is non-transferable – only the Passport holder can use it. Substitution of attendees at seminars will not be allowed.

Flexi PD Passport - $2,050+GST
Early Bird Price - $1,850+GST (purchase by Sep 9, 2019)

For company-wide training or simply group savings, anyone can buy it, and anyone can use it. Share the days with employees, colleagues, or clients.

Other benefits with the PD Passport include

- register for PD seminars at any time after your passport purchase
- 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 PD AudioWeb titles and other Online Seminars

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 160-169 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.

Save **$200** when you purchase by the

Early Bird Deadline

September 9, 2019

Vancouver

Oct-11	Code Decoded: Evolving Professional Ethical Expectations	8:30am-12:30pm	Sutton Place	92
Oct-16	Income Tax – Update 2019	9am-5pm	Hyatt Regency	138
Oct-17	ASPE – Update 2019	9am-12:30pm	Sutton Place	49
Oct-17	Assurance – Update 2019	1:30pm-5pm	Sutton Place	38
Oct-18	Income Tax – Income Splitting, a New Era	9am-12:30pm	Sutton Place	136
Oct-21	Gateway to Membership: Welcome to the Pros	9am-5pm	Sutton Place	94
Oct-21	Income Tax – Everyday Issues for General Practitioners	9am-5pm	Sutton Place	136
Oct-22	Ethics at our Core	8:30am-12:30pm	Sutton Place	93
Oct-22	Income Tax – Principal Residences	9am-12:30pm	Sutton Place	137
Oct-22	Rapid Dashboard Development with Power BI Desktop	9am-5pm	Sutton Place	80
Oct-22	Strategic Management Certificate: Strategic Planning	9am-5pm	Sutton Place	120
Oct-23	PD Nexus: Beyond Financial Reporting	8:30am-4:30pm	Van Convention Centre West	152
Oct-23	IFRS – Update 2019	9am-12:30pm	Sutton Place	50
Oct-23	Strategic Management Certificate: Change Management	9am-5pm	Sutton Place	120
Oct-24	Understanding and Embracing Ethics in the Workplace	8:30am-12:30pm	Sutton Place	95
Oct-24	Creating Vibrant Dashboards	9am-5pm	Sutton Place	70
Oct-24	Review Engagements – Specific Topics	9am-5pm	Sutton Place	44
Oct-25	PSAS – Update 2019	9am-12:30pm	Sutton Place	54
Oct-25	ASPE – Real Estate Industry	9am-5pm	Sutton Place	47
Oct-25	Income Tax – Update 2019	9am-5pm	Four Seasons	138
Oct-25	Taxation of Domestic Trusts – Fundamentals	9am-5pm	Sutton Place	144
Oct-28	Business Valuations – Fundamentals	9am-5pm	Sutton Place	63
Oct-28 & 29	Corporate Tax – Review of Tax Planning	9am-5pm	Sutton Place	128
Oct-29	Audit Engagements – Audit of a Simple Entity	9am-5pm	Hyatt Regency	40
Oct-29	Conflict: Changing Viewpoints & Influencing Behaviors	9am-5pm	Sutton Place	85
Oct-30	Code Decoded: Evolving Professional Ethical Expectations	8:30am-12:30pm	Sutton Place	92
Oct-30	Building High Performance Teams	9am-5pm	Sutton Place	104
Oct-31	Becoming a Skilled Negotiator	9am-5pm	Sutton Place	83
Oct-31	Becoming...what you really want to be	9am-5pm	Sutton Place	96
Oct-31	Income Tax – Update 2019	9am-5pm	Hyatt Regency	138
Nov-01	Enough Bull: How to Retire Well Without the Stock Market	9am-5pm	Sutton Place	148
Nov-01	Managing My People	9am-5pm	Sutton Place	112
Nov-04	Corporate Tax – RDTOH, CDA & Other Tax Accounts	9am-12:30pm	Sutton Place	127
Nov-04	Corporate Tax – Section 55: How Safe Are Your Dividends?	1:30pm-5pm	Sutton Place	129
Nov-04 & 05	Audit Engagements – Review of the Standards	9am-5pm	Sutton Place	41
Nov-04 & 05	Personal Tax – Review of Tax Planning	9am-5pm	Sutton Place	140
Nov-05	Business Ethics: It Starts With You	8:30am-12:30pm	Four Seasons	92
Nov-05	Corporate Tax – Shutting Down the Corporation	9am-12:30pm	Sutton Place	130
Nov-05	Corporate Tax – Small Business Deduction and Private Corporate Groups	9am-5pm	Four Seasons	130
Nov-05	Business Ethics: It Starts With You	1pm-5pm	Four Seasons	92
Nov-06	Assurance – Compliance with Agreements, Statutes and Regulations	9am-12:30pm	Sutton Place	38
Nov-06	Corporate Restructuring – Application for Private Corporations	9am-12:30pm	Sutton Place	124
Nov-06	GST/HST – Real Property	9am-5pm	Hyatt Regency	133
Nov-06	NFPO – Taxation	9am-5pm	Hyatt Regency	139
Nov-07	To Be or Not to Be: The Executor - Powers, Obligations and Liabilities	8am-10am	Sutton Place	145

Vancouver continued

Nov-07	Corporate Tax – Scientific Research and Experimental Development (SR&ED): Fundamentals	9am-12:30pm	Sutton Place	128
Nov-07	Advanced Tax Planning for Business Succession	9am-5pm	Hyatt Regency	123
Nov-07	ASPE – Disclosure and Presentation	9am-5pm	Four Seasons	46
Nov-07	IFRS 16 – Leases	9am-5pm	Hyatt Regency	52
Nov-07	Play with Your Mind: Growth Mindset	9am-5pm	Sutton Place	100
Nov-07	RIP – Terminal Filing	9am-5pm	Four Seasons	142
Nov-07	Audit Engagements – CAS 240: Risk Related to Fraud	1:30pm-5pm	Sutton Place	41
Nov-08	ASPE – Construction Industry	9am-12:30pm	Sutton Place	46
Nov-08	Income Tax – Update 2019	9am-5pm	Hyatt Regency	138
Nov-08	What is Your Happiness Practice? It's Time to Ditch the Stress and Find Real Happiness	9am-5pm	Sutton Place	102
Nov-08	Compilation Engagements – Review of Section 9200	1:30pm-5pm	Sutton Place	42
Nov-12	Brain Focus: The Power of Full Engagement	9am-12:30pm	Sutton Place	96
Nov-12	Assurance – Update 2019 – Just Audits	10am-12pm	Sutton Place	39
Nov-12	Income Tax – Real Estate	9am-5pm	Hyatt Regency	138
Nov-12	Assurance – Update 2019 – Other Than Audits	1pm-3pm	Sutton Place	39
Nov-13	How to Achieve Your Company Vision Through Effective Performance Review	9am-12:30pm	Sutton Place	108
Nov-13	Audit Engagements – Application of the Standards Using PEG	9am-5pm	Sutton Place	40
Nov-13	Cash and Treasury Management	9am-5pm	Sutton Place	64
Nov-13	Corporate Restructuring – Fundamentals	9am-5pm	Hyatt Regency	125
Nov-13	IFRS 9 – Financial Instruments	9am-5pm	Sutton Place	51
Nov-13	Income Tax – 5 Years of Developments	9am-5pm	Hyatt Regency	134
Nov-14	Understanding and Embracing Ethics in the Workplace	8:30am-12:30pm	Van Convention Centre West	95
Nov-14	ASNFPO – Update 2019	9am-12:30pm	Van Convention Centre West	45
Nov-14	GST/HST – Fundamentals	9am-5pm	Van Convention Centre West	132
Nov-14	Internal Controls – Industry Sector	9am-5pm	Van Convention Centre West	59
Nov-14	Strategy and Risk Management for Financial Managers	9am-5pm	Van Convention Centre West	118
Nov-15	ASPE – Strategic Investments	9am-5pm	Sutton Place	48
Nov-15	The Four Intelligences: Leveraging the Whole Self in Change	9am-12:30pm	Four Seasons	101
Nov-15	Internal Control Refresher for Financial Managers	9am-5pm	Four Seasons	58
Nov-15	Taxation of Domestic Trusts – Advanced	9am-5pm	Four Seasons	144
Nov-18	Budgeting & Financial Management: Understanding Budgeting Variance Analysis & Forecasting	9am-5pm	Van Convention Centre East	62
Nov-18	Excel: Specific Skills for Creating Custom Solutions with Macros	9am-5pm	Sutton Place	72
Nov-18	Income Tax – Update 2019	9am-5pm	Van Convention Centre East	138
Nov-19	PD Nexus: Maximizing Diversity & Inclusion	8:30am-4:30pm	Van Convention Centre West	154
Nov-19	Critical Thinking and Self Reflection	9am-5pm	Four Seasons	98
Nov-19	Financial Modeling in Excel	9am-5pm	Four Seasons	76
Nov-19	Practical Tips for Controllers & CFOs	9am-5pm	Hyatt Regency	61
Nov-19 & 20	ASPE – Review of the Standards	9am-5pm	Sutton Place	48
Nov-19 & 20	Tax for Controllers	9am-5pm	Hyatt Regency	143
Nov-20	Probate Fee Avoidance Planning	8am-10am	Four Seasons	140
Nov-20	Leaders as Role Models	9am-12:30pm	Four Seasons	109
Nov-20	Corporate Tax – Scientific Research and Experimental Development (SR&ED): Advanced	9am-5pm	Four Seasons	129
Nov-20	Triple Your Reading Speed	9am-5pm	Hyatt Regency	102
Nov-21	You're Speaking – But Are You Connecting?	9am-12:30pm	Four Seasons	88

Vancouver continued

Nov-21	A Coach Approach to Problem Solving	9am-5pm	Four Seasons	89
Nov-21	US Corporate Tax – Fundamentals	9am-5pm	Four Seasons	145
Nov-21 & 22	PD Nexus: Local Government Accounting & Auditing Workshop	8:30am-4:30pm	Coast Coal Harbour	153
Nov-22	An Introduction to FAPI	8am-10am	Sutton Place	124
Nov-22	Bridging the Generational Divide	9am-12:30pm	Sutton Place	103
Nov-22	Controllership – Strategic Leadership	9am-5pm	Hyatt Regency	57
Nov-22	Emotional Intelligence in the Workplace	9am-5pm	Sutton Place	98
Nov-25	Principles of Negotiation	9am-12:30pm	Van Convention Centre West	86
Nov-25	An Introduction to Strategy Driven Budgeting	9am-5pm	Van Convention Centre West	116
Nov-25	Building a Financial Model of a Company	9am-5pm	Van Convention Centre West	69
Nov-25	Fraud Risk Management	9am-5pm	Van Convention Centre West	58
Nov-25	Gateway to Membership: Welcome to the Pros	9am-5pm	Van Convention Centre West	94
Nov-25	GST/HST – Specific Topics	9am-5pm	Van Convention Centre West	133
Nov-25	Income Tax – Update 2019	9am-5pm	Van Convention Centre West	138
Nov-25	PSAS – Review of the Standards	9am-5pm	Van Convention Centre West	53
Nov-25	Strategic Management Certificate: Team Development	9am-5pm	Van Convention Centre West	120
Nov-25	Income Tax – Employee Benefits	1:30pm-5pm	Van Convention Centre West	135
Nov-26	PD Nexus: Public Practice Insights	8:30am-4:30pm	Van Convention Centre West	154
Nov 26	Public Company Reporting – Annual Update	9am-12:30pm	Van Convention Centre West	55
Nov-26	Advanced Financial Statement Analysis	9am-5pm	Van Convention Centre West	55
Nov-26	Financial Modeling – DCF Valuation Analysis	9am-5pm	Van Convention Centre West	75
Nov-26	Income Tax – Consequences to Avoid	9am-5pm	Van Convention Centre West	135
Nov-26	Income Tax – Partnerships	9am-5pm	Van Convention Centre West	137
Nov-26	Project Management: Tips & Traps	9am-5pm	Van Convention Centre West	90
Nov-26	RIP – Estate and Testamentary Trust Returns	9am-5pm	Van Convention Centre West	141
Nov-26	Sharpening Your Business Writing Skills	9am-5pm	Van Convention Centre West	87
Nov-26	Strategic Management Certificate: Risk Management & Governance	9am-5pm	Van Convention Centre West	120
Nov-27	Ethical Leadership in an Age of AI	8:30am-12:30pm	Van Convention Centre West	93
Nov-27	Achieving Results Through Collaborative Projects	9am-5pm	Van Convention Centre West	89
Nov-27	Advanced Strategic Management Certificate: Links	9am-5pm	Van Convention Centre West	121
Nov-27	Advanced Tax Planning Strategies	9am-5pm	Van Convention Centre West	123
Nov-27	Employment Law & HR Practices	9am-5pm	Van Convention Centre West	117
Nov-27	Income Tax – Assessments, Objections, Voluntary Disclosure and Risk	9am-5pm	Van Convention Centre West	134
Nov-27	Managing Financial Data With Excel	9am-5pm	Van Convention Centre West	78
Nov-27	Powerful Financial Analysis	9am-5pm	Van Convention Centre West	60
Nov-27	Systems Thinking & Resolving Complex Issues in Complex Environments	9am-5pm	Van Convention Centre West	113
Nov-27	Code Decoded: Evolving Professional Ethical Expectations	1pm-5pm	Van Convention Centre West	92
Nov-27 & 28	IFRS – Disclosure and Presentation	9am-5pm	Van Convention Centre West	49
Nov-28	Becoming an Ethical Leader	8:30am-12:30pm	Van Convention Centre West	91
Nov-28	Managing Transitions: Leading the People Side of Change	9am-12:30pm	Van Convention Centre West	112
Nov-28	Quality Control – Application of CSQC1	9am-12:30pm	Van Convention Centre West	43
Nov-28	Data Analysis & Communication with Excel	9am-5pm	Van Convention Centre West	71
Nov-28	Effective Financial Analysis for Business Decisions – Small Businesses	9am-5pm	Van Convention Centre West	57
Nov-28	Excel Data Magic, Including Advanced PivotTables & Power Pivot	9am-5pm	Van Convention Centre West	74

Vancouver continued

Nov-28	Leadership in a Changing World	9am-5pm	Van Convention Centre West	110
Nov-28	US Tax – Personal Investment in Real Estate	9am-5pm	Van Convention Centre West	146
Nov-28	Shades of Grey: Ethics in the Workplace	1pm-5pm	Van Convention Centre West	94
Nov-28	Leading Sustainable Change: Make it Happen	1:30pm-5pm	Van Convention Centre West	111
Nov-29	Code Decoded: Evolving Professional Ethical Expectations	8:30am-12:30pm	Van Convention Centre West	92
Nov-29	Corporate Tax – Investment Holding Companies	9am-12:30pm	Van Convention Centre West	126
Nov-29	Building Enterprise Performance Dashboards	9am-5pm	Van Convention Centre West	56
Nov-29	Due Diligence for Acquisitions	9am-5pm	Van Convention Centre West	65
Nov-29	Dynamic Leadership: Adjusting Your Leadership Style to the Situation	9am-5pm	Van Convention Centre West	106
Nov-29	Excel Tips, Tricks and Techniques for Accountants	9am-5pm	Van Convention Centre West	75
Nov-29	Income Tax – Update 2019	9am-5pm	Van Convention Centre West	138
Nov-29	Presentation Skills for Introvert Accountants	9am-5pm	Van Convention Centre West	86
Nov-29	Wiring Your Brain for High Impact Leadership	9am-5pm	Van Convention Centre West	114
Nov-30	Code Decoded: Evolving Professional Ethical Expectations	8:30am-12:30pm	Van Convention Centre West	92
Nov-30	Income Tax – Update 2019	9am-5pm	Van Convention Centre West	138
Dec-02	Code Decoded: Evolving Professional Ethical Expectations	8:30am-12:30pm	Van Convention Centre West	92
Dec-02	IFRS – Update 2019	9am-12:30pm	Van Convention Centre West	50
Dec-02	Business Valuations – Purchase Price Allocation	9am-5pm	Van Convention Centre West	64
Dec-02	Coaching for Executive Excellence	9am-5pm	Van Convention Centre West	104
Dec-02	Communicating Effectively Under Pressure	9am-5pm	Van Convention Centre West	84
Dec-02	Excel: The Next Level of Skills	9am-5pm	Van Convention Centre West	73
Dec-02	NFPO – Review of the Standards	9am-5pm	Van Convention Centre West	53
Dec-02	PSAS – Specific Topics	9am-5pm	Van Convention Centre West	54
Dec-02	US Personal Tax – Fundamentals	9am-5pm	Van Convention Centre West	146
Dec-03	ASPE – Update 2019	9am-12:30pm	Van Convention Centre West	49
Dec-03	Top Employment Issues Affecting Your Bottom Line	9am-12:30pm	Van Convention Centre West	119
Dec-03	Excel: Specific Skills for Budgeting, Planning & Forecasting	9am-5pm	Van Convention Centre West	72
Dec-03	GST/HST – NFPOs	9am-5pm	Van Convention Centre West	132
Dec-03	Modeling Project Finance: Real Estate	9am-5pm	Van Convention Centre West	78
Dec-03	NFPO – Disclosure and Presentation	9am-5pm	Van Convention Centre West	52
Dec-03	Professional Presence	9am-5pm	Van Convention Centre West	100
Dec-03	Smoke and Mirrors: Financial Myths that will Ruin Your Retirement Dreams	9am-5pm	Van Convention Centre West	149
Dec-03	Tools for Communicating with Difficult People	9am-5pm	Van Convention Centre West	87
Dec-04	Understanding and Embracing Ethics in the Workplace	8:30am-12:30pm	Van Convention Centre West	95
Dec-04	Cyber Security and Awareness	9am-12:30pm	Van Convention Centre West	70
Dec-04	ASPE – Related Party Transactions	9am-5pm	Van Convention Centre West	47
Dec-04	Balancing Your Wheels	9am-5pm	Van Convention Centre West	95
Dec-04	Budgeting & Financial Management: Understanding Budgeting Variance Analysis & Forecasting	9am-5pm	Van Convention Centre West	62
Dec-04	Corporate Restructuring – Section 85: Transfer of Property	9am-5pm	Van Convention Centre West	125
Dec-04	Effective & Essential Management Skills	9am-5pm	Van Convention Centre West	106
Dec-04	The Simplest Personal Finance Strategy Ever	9am-5pm	Van Convention Centre West	150
Dec-04	Transforming the Way You Sell Yourself	9am-5pm	Van Convention Centre West	88
Dec-04	Writing & Maintaining Task-Based Procedures	9am-5pm	Van Convention Centre West	61

Vancouver continued

Dec-05	Income Tax – Income Splitting, a New Era	9am-12:30pm	Van Convention Centre West	136
Dec-05	Break Free of the Box: Creative Solutions to Workplace Challenges	9am-5pm	Van Convention Centre West	97
Dec-05	Communicating with Influence	9am-5pm	Van Convention Centre West	84
Dec-05	Enhancing Your Leadership Impact	9am-5pm	Van Convention Centre West	108
Dec-05	GST/HST – CRA Audit	9am-5pm	Van Convention Centre West	131
Dec-05	IFRS 15 – Revenue Recognition	9am-5pm	Van Convention Centre West	51
Dec-05	Income Tax – Update 2019	9am-5pm	Van Convention Centre West	138
Dec-05	Management Accounting – Fundamentals	9am-5pm	Van Convention Centre West	59
Dec-05	Review Engagements – Application of the Standard	9am-5pm	Van Convention Centre West	44
Dec-05	RIP – Estate Planning	9am-5pm	Van Convention Centre West	142
Dec-06	PD Nexus: Business Insights Vancouver	8:30am-4:30pm	Van Convention Centre West	153
Dec-06	Current Strategies in Tax Dispute Resolution	9am-12:30pm	Van Convention Centre West	131
Dec-06	NFPO – Governance	9am-12:30pm	Van Convention Centre West	118
Dec-06	Controllership – Operational Management	9am-5pm	Van Convention Centre West	56
Dec-06	Corporate Tax – Purchase and Sale of a Business	9am-5pm	Van Convention Centre West	127
Dec-06	Excel Financial Models and Analysis	9am-5pm	Van Convention Centre West	74
Dec-06	Leadership and Coaching	9am-5pm	Van Convention Centre West	110
Dec-06	PST – Review of Jurisdictional Sales Tax	9am-5pm	Van Convention Centre West	141
Dec-06	Income Tax – Principal Residences	1:30pm-5pm	Van Convention Centre West	137
Dec-07	Ethics at our Core	8:30am-12:30pm	Van Convention Centre West	93
Dec-07	Income Tax – Update 2019	9am-5pm	Van Convention Centre West	138
Dec-09	Becoming an Ethical Leader	8:30am-12:30pm	Sutton Place	91
Dec-09	Shades of Grey: Ethics in the Workplace	1pm-5pm	Sutton Place	94
Dec-09	Empowering and Engaging Others	9am-5pm	Sutton Place	107
Dec-09	Starting a Successful CPA Practice	9am-5pm	Sutton Place	115
Dec-09	Strategic Management Certificate: Strategic Planning	9am-5pm	Sutton Place	120
Dec-09 & 10	IFRS – Review of the Standards	9am-5pm	Sutton Place	50
Dec-10	Handling Termination of Employment	8am-10am	Sutton Place	117
Dec-10	Advanced Strategic Management Certificate: Maps	9am-5pm	Sutton Place	121
Dec-10	Corporate Finance	9am-5pm	Hyatt Regency	65
Dec-10	Fraud Happens – What to do When You Suspect Fraud	9am-5pm	Hyatt Regency	42
Dec-10	Intro-Mediate Excel Techniques	9am-5pm	Sutton Place	77
Dec-10	Personal Effectiveness: Self Awareness and Balanced Thinking	9am-5pm	Sutton Place	99
Dec-11	Code Decoded: Evolving Professional Ethical Expectations	8:30am-12:30pm	Sutton Place	92
Dec-11	Clear Thinking/Clear Speaking	9am-5pm	Hyatt Regency	83
Dec-11	Coach Yourself First	9am-5pm	Sutton Place	97
Dec-11	Corporate Tax – Compliance & Planning in T2 Preparation	9am-5pm	Hyatt Regency	126
Dec-11	Google is Not Enough: The Best Search Tools You Aren't Using (But Should!)	9am-5pm	Sutton Place	77
Dec-11	Income Tax – Update 2019	9am-5pm	Sutton Place	138
Dec-11	Optimizing Data for Power Pivot using Power Query	9am-5pm	Sutton Place	79
Dec-12	ASNFPO – Update 2019	9am-12:30pm	Sutton Place	45
Dec-12	Dispelling the Myth of "Effective Meetings"	9am-12:30pm	Sutton Place	105
Dec-12	US Tax Reform – Implications for Canadian Businesses	9am-12:30pm	Sutton Place	147
Dec-12	Financing Strategies	9am-5pm	Sutton Place	66
Dec-12	Income Tax – Update 2019	9am-5pm	Sutton Place	138

Vancouver continued

Dec-13	Code Decoded: Evolving Professional Ethical Expectations	8:30am-12:30pm	Four Seasons	92
Dec-13	ASPE – Comparison to IFRS	9am-5pm	Four Seasons	45
Dec-13	Business Valuations – Advanced	9am-5pm	Hyatt Regency	63
Dec-13	GST/HST – Real Property	9am-5pm	Four Seasons	133
Dec-13	Make Change Stick: Getting Results by Changing the Inner Game	9am-5pm	Four Seasons	111
Dec-13	Time Management: The Essentials of Productivity Skills	9am-5pm	Hyatt Regency	101
Jan-16	Income Tax – Update 2019	9am-5pm	Hyatt Regency	138
Jan-17	Income Tax – Everyday Issues for General Practitioners	9am-5pm	Sutton Place	136
Jan-20	Income Tax – Employee Benefits	1:30pm-5pm	Sutton Place	135
Jan-24	ASPE – Construction Industry	9am-12:30pm	Sutton Place	46
Jan-24	ASPE – Update 2019	1:30pm-5pm	Sutton Place	49
Jan-27	Compilation Engagements – Review of Section 9200	9am-12:30pm	Sutton Place	42
Jan-27	Personal Tax – Compliance & Planning in T1 Preparation	9am-5pm	Sutton Place	139
Jan-28	Assurance – Update 2019	9am-12:30am	Sutton Place	38
Jan-28	Income Tax – Update 2019	9am-5pm	Sutton Place	138
Jan-29	PSAS – Update 2019	9am-12:30pm	Sutton Place	54
Jan-29	Corporate Tax – Purchase and Sale of a Business	9am-5pm	Sutton Place	127
Jan-30	Advanced Tax Planning Strategies	9am-5pm	Sutton Place	123
Feb-03	Income Tax – Update 2019	9am-5pm	Hyatt Regency	138
Feb-04	Budgeting & Financial Management: Understanding Budgeting Variance Analysis & Forecasting	9am-5pm	Sutton Place	62
Feb-04	Corporate Tax – Small Business Deduction and Private Corporate Groups	9am-5pm	Sutton Place	130
Feb-04	Financial Modeling in Excel	9am-5pm	Sutton Place	76
Feb-05	Becoming an Ethical Leader	8:30am-12:30pm	Sutton Place	91
Feb-05	Shades of Grey: Ethics in the Workplace	1pm-5pm	Sutton Place	94
Feb-05	Becoming a Skilled Negotiator	9am-5pm	Sutton Place	83
Feb-05	Paperless Office	9am-5pm	Sutton Place	79
Feb-06	ASPE – Real Estate Industry	9am-5pm	Sutton Place	47
Feb-06	Cloud Computing: The Future is Here	9am-5pm	Sutton Place	69
Feb-06	Review Engagements – Specific Topics	9am-5pm	Sutton Place	44
Feb-07	Technology Update	9am-12:30pm	Sutton Place	81
Feb-07	Tech Tools and Gadgets for a More Efficient You	1:30pm-5pm	Sutton Place	80
Feb-07	DAX Formulas for PowerPivot	9am-5pm	Sutton Place	71
Feb-10	Tax Issues in the Sharing Economy	8am-10am	Sutton Place	143
Feb-10	Advanced Data Magic with Excel	9am-5pm	Sutton Place	67
Feb-10	Audit Engagements – Audit of a Simple Entity	9am-5pm	Sutton Place	40
Feb-11	Business Valuations – Fundamentals	9am-5pm	Sutton Place	63
Feb-11	Income Tax – Partnerships	9am-5pm	Sutton Place	137
Feb-11 & 12	Excel Boot Camp	9am-5pm	Sutton Place	73
Feb-12	Marketing Your Business Without Breaking the Bank	9am-5pm	Sutton Place	60
Feb-12	Review Engagements – Application of the Standard	9am-5pm	Sutton Place	44
Feb-13	Becoming a High Performance Team Member	9am-5pm	Sutton Place	103
Feb-13	GST/HST – Fundamentals	9am-5pm	Sutton Place	132
Feb-14	GST/HST – Specific Topics	9am-5pm	Sutton Place	133
Feb-18	Corporate Restructuring – Section 85: Transfer of Property	9am-5pm	Sutton Place	125

Vancouver continued

Feb-18	Excel: Specific Skills for Budgeting, Planning & Forecasting	9am-5pm	Sutton Place	72
Feb-19	Assurance – Update 2019 – Just Audits	10am-12pm	Sutton Place	39
Feb-19	Assurance – Update 2019 – Other Than Audits	1pm-3pm	Sutton Place	39
Feb-19	Creating Healthy Conflict in the Workplace	9am-5pm	Sutton Place	85
Feb-19	Strategic Management Certificate: Strategic Planning	9am-5pm	Sutton Place	120
Feb-19	Wiring Your Brain for High Impact Leadership	9am-5pm	Sutton Place	114
Feb-20	IFRS 16 – Leases	9am-5pm	Sutton Place	52
Feb-20	Sharpening Your Business Writing Skills	9am-5pm	Sutton Place	87
Feb-20	Strategic Management Certificate: Change Management	9am-5pm	Sutton Place	120
Feb-21	Enhancing Your Management Skills	9am-12:30pm	Sutton Place	107
Feb-21	IFRS 9 – Financial Instruments	9am-5pm	Sutton Place	51
Feb-24	Business Valuations – Purchase Price Allocation	9am-5pm	Sutton Place	64
Feb-24 & 25	ASPE – Review of the Standards	9am-5pm	Sutton Place	48
Feb-24 & 25	Personal Tax – Review of Tax Planning	9am-5pm	Sutton Place	140
Feb-25	Ethical Leadership in an Age of AI	8:30am-12:30pm	Sutton Place	93
Feb-25	Excel Financial Models and Analysis	9am-5pm	Sutton Place	74
Feb-25	Strategic Management Certificate: Team Development	9am-5pm	Sutton Place	120
Feb-26	Excel: The Next Level of Skills	9am-5pm	Sutton Place	73
Feb-26	Strategic Management Certificate: Risk Management & Governance	9am-5pm	Sutton Place	120
Feb-27	Communicating Effectively Under Pressure	9am-5pm	Sutton Place	84
Mar-03	Building a Financial Model of a Company	9am-5pm	Sutton Place	69
Mar-03	Clear Thinking/Clear Speaking	9am-5pm	Sutton Place	83
Mar-04	Influence and Assertiveness	9am-5pm	Sutton Place	99
Mar-04	Managing Financial Data With Excel	9am-5pm	Sutton Place	78
Mar-05	Understanding and Embracing Ethics in the Workplace	8:30am-12:30pm	Sutton Place	95
Mar-05	Data Analysis & Communication with Excel	9am-5pm	Sutton Place	71
Mar-05	Seven Steps to Successful Virtual Teamwork	9am-5pm	Sutton Place	113
Mar-06	Excel: Specific Skills for Creating Custom Solutions with Macros	9am-5pm	Sutton Place	72
Mar-09	Ethics at our Core	8:30am-12:30pm	Sutton Place	93
Mar-10	Influencing Without Authority	9am-5pm	Sutton Place	109
Mar-10	Personal Effectiveness: Self Awareness and Balanced Thinking	9am-5pm	Sutton Place	99
Mar-10	Rapid Dashboard Development with Power BI Desktop	9am-5pm	Sutton Place	80
Mar-11	Business Ethics: It Starts With You	8:30am-12:30pm	Sutton Place	92
Mar-11	Business Ethics: It Starts With You	1pm-5pm	Sutton Place	92
Mar-11	Getting Started with Excel PowerPivot	9am-5pm	Sutton Place	76
Mar-12	An End to Manual Effort in Excel: The Power Query Effect	9am-5pm	Sutton Place	68
Mar-12	Controllership – Operational Management	9am-5pm	Sutton Place	56
Mar-12 & 13	Corporate Tax – Review of Tax Planning	9am-5pm	Sutton Place	128
Mar-13	Controllership – Strategic Leadership	9am-5pm	Sutton Place	57
Mar-16	Advanced Strategic Management Certificate: Links	9am-5pm	Sutton Place	121
Mar-17	Advanced Strategic Management Certificate: Maps	9am-5pm	Sutton Place	121
Mar-17	Doing Business as Unusual	9am-5pm	Sutton Place	105
Mar-18	Thinking Beyond the Box – Part 1	9am-5pm	Sutton Place	90
Mar-19	Thinking Beyond the Box – Part 2	9am-5pm	Sutton Place	91

Abbotsford

Oct-17	Compilation Engagements – Review of Section 9200	9am-12:30pm	Best Western Plus Regency	42
Oct-22	Budgeting & Financial Management: Understanding Budgeting Variance Analysis & Forecasting	9am-5pm	Best Western Plus Regency	62
Oct-28	ASPE – Update 2019	9am-12:30pm	Best Western Plus Regency	49
Oct-28	Assurance – Update 2019	1:30pm-5pm	Best Western Plus Regency	38
Oct-30	ASPE – Disclosure and Presentation	9am-5pm	Best Western Plus Regency	46
Nov-05	Review Engagements – Specific Topics	9am-5pm	Best Western Plus Regency	44
Nov-06	Excel: The Next Level of Skills	9am-5pm	Quality Hotel	73
Nov-07	Ethics at our Core	8:30am-12:30pm	Best Western Plus Regency	93
Nov-08	Presentation Skills for Introvert Accountants	9am-5pm	Best Western Plus Regency	86
Nov-13	Employment Law & HR Practices	9am-5pm	Best Western Plus Regency	117
Nov-14	The Simplest Personal Finance Strategy Ever	9am-5pm	Best Western Plus Regency	150
Nov-15	Business Valuations – Fundamentals	9am-5pm	Best Western Plus Regency	63
Nov-26	Influence and Assertiveness	9am-5pm	Quality Hotel	99
Nov-29	Powerful Financial Analysis	9am-5pm	Quality Hotel	60
Dec-03	Code Decoded: Evolving Professional Ethical Expectations	8:30am-12:30pm	Best Western Plus Regency	92
Dec-04	Income Tax – Update 2019	9am-5pm	Quality Hotel	138
Dec-09	Corporate Tax – Compliance & Planning in T2 Preparation	9am-5pm	Quality Hotel	126
Dec-11	Paperless Office	9am-5pm	Quality Hotel	79

Burnaby

Oct-24	Business Ethics: It Starts With You	8:30am-12:30pm	Holiday Inn Express	92
Oct-24	Business Ethics: It Starts With You	1pm-5pm	Holiday Inn Express	92
Nov-13	ASPE – Update 2019	9am-12:30pm	Hilton Metrotown	49
Nov-13	Assurance – Update 2019	1:30pm-5pm	Hilton Metrotown	38
Nov-20	Code Decoded: Evolving Professional Ethical Expectations	8:30am-12:30pm	Hilton Metrotown	92
Nov-20	Technology Update	9am-12:30pm	Hilton Metrotown	81
Nov-20	Word, Outlook, and PowerPoint: Tips and Tricks for Enhancing Productivity	1:30pm-5pm	Hilton Metrotown	81
Nov-26	Income Tax – Update 2019	9am-5pm	Hilton Metrotown	138
Mar-10	Ethics at our Core	8:30am-12:30pm	Hilton Metrotown	93

Castlegar

Oct-04	Income Tax – Update 2019	9am-5pm	Super 8 Castlegar	138
Oct-10	Excel Financial Models and Analysis	9am-5pm	Super 8 Castlegar	74

Coquitlam

Oct-11	Income Tax – Income Splitting, a New Era	9am-12:30pm	Executive Plaza	136
Oct-22	Business Ethics: It Starts With You	8:30am-12:30pm	Executive Plaza	92
Oct-22	Business Ethics: It Starts With You	1pm-5pm	Executive Plaza	92
Oct-23	Budgeting & Financial Management: Understanding Budgeting Variance Analysis & Forecasting	9am-5pm	Executive Plaza	62
Nov-08	Income Tax – Update 2019	9am-5pm	Executive Plaza	138
Nov-12	Business Valuations – Fundamentals	9am-5pm	Executive Plaza	63
Nov-13	Communicating Effectively Under Pressure	9am-5pm	Executive Plaza	84
Nov-15	The Procrastinator's Guide to Retirement	9am-5pm	Executive Plaza	149
Nov-18	ASPE – Update 2019	9am-12:30pm	Executive Plaza	49
Nov-18	Assurance – Update 2019	1:30pm-5pm	Executive Plaza	38

Coquitlam continued

Nov-20	Excel Financial Models and Analysis	9am-5pm	Executive Plaza	74
Nov-21	Leadership and Coaching	9am-5pm	Executive Plaza	110
Nov-25	Excel: The Next Level of Skills	9am-5pm	Executive Plaza	73
Nov-29	Ethics at our Core	8:30am-12:30pm	Executive Plaza	93
Dec-04	Code Decoded: Evolving Professional Ethical Expectations	8:30am-12:30pm	Executive Plaza	92
Dec-09	An End to Manual Effort in Excel: The Power Query Effect	9am-5pm	Executive Plaza	68
Dec-09	Corporate Tax – Compliance & Planning in T2 Preparation	9am-5pm	Executive Plaza	126
Dec-10	Personal Tax – Compliance & Planning in T1 Preparation	9am-5pm	Executive Plaza	139
Feb-26	Code Decoded: Evolving Professional Ethical Expectations	8:30am-12:30pm	Executive Plaza	92

Courtenay

Nov-07	ASPE – Update 2019	9am-12:30pm	Old House Hotel	49
Nov-07	Compilation Engagements – Review of Section 9200	1:30pm-5pm	Old House Hotel	42
Nov-13	Code Decoded: Evolving Professional Ethical Expectations	1pm-5pm	Old House Hotel	92
Nov-14	Advanced Tax Planning Strategies	9am-5pm	Old House Hotel	123
Nov-15	Income Tax – Update 2019	9am-5pm	Old House Hotel	138
Nov-25	Tools for Communicating with Difficult People	9am-5pm	Old House Hotel	87
Dec-02	Excel Tips, Tricks and Techniques for Accountants	9am-5pm	Old House Hotel	75

Fort St John

Oct-10	Income Tax – Update 2019	9am-5pm	Northern Grand	138
Oct-11	Code Decoded: Evolving Professional Ethical Expectations	8:30am-12:30pm	Northern Grand	92

Kamloops

Oct-28	ASPE – Update 2019	9am-12:30pm	Coast Kamloops	49
Oct-28	Excel Financial Models and Analysis	9am-5pm	Coast Kamloops	74
Nov-15	Income Tax – Update 2019	9am-5pm	Coast Kamloops	138
Nov-19	Income Tax – Everyday Issues for General Practitioners	9am-5pm	Coast Kamloops	136
Nov-20	Code Decoded: Evolving Professional Ethical Expectations	8:30am-12:30pm	Coast Kamloops	92
Nov-20	Income Tax – Income Splitting, a New Era	1:30pm-5pm	Coast Kamloops	136
Nov-22	Powerful Financial Analysis	9am-5pm	Coast Kamloops	60

Kelowna

Oct-22	Advanced Tax Planning Strategies	9am-5pm	Coast Capri	123
Oct-23	Income Tax – Everyday Issues for General Practitioners	9am-5pm	Coast Capri	136
Oct-24	Effective & Essential Management Skills	9am-5pm	Ramada Hotel	106
Oct-25	PD Nexus: Business Insights Kelowna	8:30am-4:30pm	Coast Capri	152
Oct-30	Critical Thinking and Self Reflection	9am-5pm	Ramada Hotel	98
Oct-30	Enough Bull: How to Retire Well Without the Stock Market	9am-5pm	Ramada Hotel	148
Oct-31	Leadership and Coaching	9am-5pm	Ramada Hotel	110
Nov-04	PSAS – Update 2019	1:30pm-5pm	Coast Capri	54
Nov-05	An Introduction to Strategy Driven Budgeting	9am-5pm	Coast Capri	116

Kelowna continued

Nov-06	Tools for Communicating with Difficult People	9am-5pm	Ramada Hotel	87
Nov-07	ASPE – Update 2019	9am-12:30pm	Ramada Hotel	49
Nov-07	Assurance – Update 2019	1:30pm-5pm	Ramada Hotel	38
Nov-08	Income Tax – Income Splitting, a New Era	9am-12:30pm	Ramada Hotel	136
Nov-12	Budgeting & Financial Management: Understanding Budgeting Variance Analysis & Forecasting	9am-5pm	Ramada Hotel	62
Nov-13	Becoming an Ethical Leader	8:30am-12:30pm	Ramada Hotel	91
Nov-13	Controllership – Operational Management	9am-5pm	Ramada Hotel	56
Nov-13	Shades of Grey: Ethics in the Workplace	1pm-5pm	Ramada Hotel	94
Nov-14	ASNFPO – Update 2019	9am-12:30pm	Ramada Hotel	45
Nov-14	Compilation Engagements – Review of Section 9200	1:30pm-5pm	Ramada Hotel	42
Nov-15	Excel: The Next Level of Skills	9am-5pm	Ramada Hotel	73
Nov-15	Review Engagements – Specific Topics	9am-5pm	Ramada Hotel	44
Nov-18	Paperless Office	9am-5pm	Coast Capri	79
Nov-18	Powerful Financial Analysis	9am-5pm	Coast Capri	60
Nov-19	Blockchain and Emerging Technologies	9am-12:30pm	Coast Capri	68
Nov-19	RIP – Estate Planning	9am-5pm	Coast Capri	142
Nov-19	Word, Outlook, and PowerPoint: Tips and Tricks for Enhancing Productivity	1:30pm-5pm	Coast Capri	81
Nov-20	Business Valuations – Fundamentals	9am-5pm	Coast Capri	63
Nov-20	Corporate Restructuring – Fundamentals	9am-5pm	Coast Capri	125
Nov-21	Communicating with Influence	9am-5pm	Coast Capri	84
Nov-21	Income Tax – Update 2019	9am-5pm	Coast Capri	138
Nov-22	Code Decoded: Evolving Professional Ethical Expectations	8:30am-12:30pm	Coast Capri	92
Nov-22	Corporate Tax – Purchase and Sale of a Business	9am-5pm	Coast Capri	127
Nov-25	Audit Engagements – Audit of a Simple Entity	9am-5pm	Coast Capri	40
Nov-26	NFPO – Review of the Standards	9am-5pm	Coast Capri	53
Dec-03	Income Tax – Update 2019	9am-5pm	Coast Capri	138
Dec-04	Marketing Your Business Without Breaking the Bank	9am-5pm	Ramada Hotel	60
Dec-05	Presentation Skills for Introvert Accountants	9am-5pm	Ramada Hotel	86
Dec-06	Corporate Tax – Section 55: How Safe Are Your Dividends?	1:30pm-5pm	Ramada Hotel	129
Dec-06	Corporate Tax – Shutting Down the Corporation	9am-12:30pm	Ramada Hotel	130
Dec-09 & 10	Corporate Tax – Review of Tax Planning	9am-5pm	Coast Capri	128
Jan-16	Personal Tax – Compliance & Planning in T1 Preparation	9am-5pm	Ramada Hotel	139

Nanaimo

Oct-30	ASPE – Disclosure and Presentation	9am-5pm	Best Western Dorchester	46
Oct-31	ASPE – Update 2019	9am-12:30pm	Best Western Dorchester	49
Oct-31	Assurance – Update 2019	1:30pm-5pm	Best Western Dorchester	38
Nov-04	NFPO – Review of the Standards	9am-5pm	Best Western Dorchester	53
Nov-05	Compilation Engagements – Review of Section 9200	9am-12:30pm	Best Western Dorchester	42
Nov-14	Income Tax – Update 2019	9am-5pm	Vancouver Island Conference Ctr	138
Nov-15	Code Decoded: Evolving Professional Ethical Expectations	8:30am-12:30pm	Vancouver Island Conference Ctr	92
Nov-15	Income Tax – Income Splitting, a New Era	9am-12:30pm	Vancouver Island Conference Ctr	136
Nov-25	Income Tax – Everyday Issues for General Practitioners	9am-5pm	Best Western Dorchester	136

Parksville

Nov-04	Income Tax – Everyday Issues for General Practitioners	9am-5pm	The Beach Club Resort	136
Nov-05	Income Tax – Update 2019	9am-5pm	The Beach Club Resort	138
Nov-06	ASPE – Update 2019	9am-12:30pm	The Beach Club Resort	49
Nov-06	ASNFPO – Update 2019	1:30pm-5pm	The Beach Club Resort	45
Nov-07	Business Valuations – Fundamentals	9am-5pm	The Beach Club Resort	63
Nov-14	Code Decoded: Evolving Professional Ethical Expectations	8:30am-12:30pm	Quality Resort Bayside	92

Prince George

Oct-21	ASPE – Update 2019	9am-12:30pm	Ramada Plaza	49
Oct-21	Assurance – Update 2019	1:30pm-5pm	Ramada Plaza	38
Oct-22	ASNFPO – Update 2019	9am-12:30pm	Ramada Plaza	45
Oct-28	Income Tax – Everyday Issues for General Practitioners	9am-5pm	Ramada Plaza	136
Oct-29	Income Tax – Update 2019	9am-5pm	Ramada Plaza	138
Nov-06	Empowering and Engaging Others	9am-5pm	Ramada Plaza	107
Nov-07	Business Ethics: It Starts With You	8:30am-12:30pm	Ramada Plaza	92
Nov-07	Business Ethics: It Starts With You	1pm-5pm	Ramada Plaza	92
Nov-08	Communicating Effectively Under Pressure	9am-5pm	Ramada Plaza	84

Richmond

Oct-24	Becoming an Ethical Leader	8:30am-12:30pm	Sandman Signature Airport	91
Oct-24	Income Tax – Update 2019	9am-5pm	Executive Airport Plaza	138
Oct-24	Shades of Grey: Ethics in the Workplace	1pm-5pm	Sandman Signature Airport	94
Nov-07	Ethics at our Core	8:30am-12:30pm	Sandman Signature Airport	93
Nov-07	Income Tax – Update 2019	9am-5pm	Executive Airport Plaza	138
Nov-15	ASPE – Update 2019	9am-12:30pm	Executive Airport Plaza	49
Dec-10	Code Decoded: Evolving Professional Ethical Expectations	8:30am-12:30pm	Executive Airport Plaza	92
Feb-20	Business Ethics: It Starts With You	8:30am-12:30pm	Executive Airport Plaza	92
Feb-20	Business Ethics: It Starts With You	1pm-5pm	Executive Airport Plaza	92

Surrey

Oct-17	Business Ethics: It Starts With You	8:30am-12:30pm	Sheraton Guildford	92
Oct-17	Business Ethics: It Starts With You	1pm-5pm	Sheraton Guildford	92
Oct-18	Income Tax – Update 2019	9am-5pm	Sheraton Guildford	138
Oct-23 & 24	Tax for Controllers	9am-5pm	Civic Hotel	143
Oct-25	Employment Law & HR Practices	9am-5pm	Civic Hotel	117
Oct-31	The Simplest Personal Finance Strategy Ever	9am-5pm	Sheraton Guildford	150
Nov-01	ASPE – Update 2019	9am-12:30pm	Sheraton Guildford	49
Nov-01	IFRS – Update 2019	1:30pm-5pm	Sheraton Guildford	50
Nov-04	ASPE – Real Estate Industry	9am-5pm	Sheraton Guildford	47
Nov-04	Communicating Effectively Under Pressure	9am-5pm	Sheraton Guildford	84
Nov-05	Budgeting & Financial Management: Understanding Budgeting Variance Analysis & Forecasting	9am-5pm	Sheraton Guildford	62
Nov-05	GST/HST – Fundamentals	9am-5pm	Sheraton Guildford	132
Nov-06	Financial Modeling in Excel	9am-5pm	Sheraton Guildford	76
Nov-06	Income Tax – Real Estate	9am-5pm	Sheraton Guildford	138
Nov-07	A Coach Approach to Problem Solving	9am-5pm	Sheraton Guildford	89

Surrey continued

Nov-07	Becoming an Ethical Leader	8:30am-12:30pm	Sheraton Guildford	91
Nov-07	Shades of Grey: Ethics in the Workplace	1pm-5pm	Sheraton Guildford	94
Nov-08	Controllership – Operational Management	9am-5pm	Sheraton Guildford	56
Nov-08	Fraud Risk Management	9am-5pm	Sheraton Guildford	58
Nov-12	Income Tax – Income Splitting, a New Era	9am-12:30pm	Sheraton Guildford	136
Nov-14	Business Valuations – Fundamentals	9am-5pm	Sheraton Guildford	63
Nov-14	You're Speaking – But Are You Connecting?	9am-12:30pm	Sheraton Guildford	88
Nov-15	Gateway to Membership: Welcome to the Pros (Student)	9am-5pm	Sheraton Guildford	
Nov-18	Presentation Skills for Introvert Accountants	9am-5pm	Sheraton Guildford	86
Nov-19	Income Tax – Principal Residences	9am-12:30pm	Sheraton Guildford	137
Nov-20	Practical Tips for Controllers & CFOs	9am-5pm	Sheraton Guildford	61
Nov-22	RIP – Estate Planning	9am-5pm	Sheraton Guildford	142
Nov-25	Income Tax – Everyday Issues for General Practitioners	9am-5pm	Sheraton Guildford	136
Nov-27	ASNFPO – Update 2019	9am-12:30pm	Sheraton Guildford	45
Nov-27	Assurance – Update 2019	1:30pm-5pm	Sheraton Guildford	38
Nov-27	Triple Your Reading Speed	9am-5pm	Sheraton Guildford	102
Nov-28	Treasury & Finance for Accountants	9am-5pm	Sheraton Guildford	66
Dec-03	Google is Not Enough: The Best Search Tools You Aren't Using (But Should!)	9am-5pm	Sheraton Guildford	77
Dec-03	Income Tax – Update 2019	9am-5pm	Sheraton Guildford	138
Dec-05	Advanced Tax Planning Strategies	9am-5pm	Sheraton Guildford	123
Dec-05	Code Decoded: Evolving Professional Ethical Expectations	8:30am-12:30pm	Sheraton Guildford	92
Dec-06	Communicating with Influence	9am-5pm	Sheraton Guildford	84
Dec-09	ASPE – Construction Industry	9am-12:30pm	Sheraton Guildford	46
Dec-09	Compilation Engagements – Review of Section 9200	1:30pm-5pm	Sheraton Guildford	42
Dec-10	Controllership – Strategic Leadership	9am-5pm	Sheraton Guildford	57
Dec-10	Enhancing Your Management Skills	9am-12:30pm	Sheraton Guildford	107
Dec-11	Corporate Tax – Purchase and Sale of a Business	9am-5pm	Sheraton Guildford	127
Dec-12	Critical Thinking and Self Reflection	9am-5pm	Sheraton Guildford	98
Jan-21 & 22	Personal Tax – Review of Tax Planning	9am-5pm	Sheraton Guildford	140
Feb-03	Blockchain and Emerging Technologies	9am-12:30pm	Sheraton Guildford	68
Feb-03	Word, Outlook, and PowerPoint: Tips and Tricks for Enhancing Productivity	1:30pm-5pm	Sheraton Guildford	81
Feb-04	Cloud Computing: The Future is Here	9am-5pm	Sheraton Guildford	69
Feb-06	Getting Started with Excel PowerPivot	9am-5pm	Sheraton Guildford	76
Feb-07	Corporate Tax – Compliance & Planning in T2 Preparation	9am-5pm	Sheraton Guildford	126
Feb-12	Business Ethics: It Starts With You	8:30am-12:30pm	Sheraton Guildford	92
Feb-12	Business Ethics: It Starts With You	1pm-5pm	Sheraton Guildford	92
Feb-13	Leadership and Coaching	9am-5pm	Sheraton Guildford	110
Feb-19	Empowering and Engaging Others	9am-5pm	Sheraton Guildford	107
Feb-20	Marketing Your Business Without Breaking the Bank	9am-5pm	Sheraton Guildford	60
Feb-26	Wiring Your Brain for High Impact Leadership	9am-5pm	Sheraton Guildford	114
Mar-04	Brain Focus: The Power of Full Engagement	9am-12:30pm	Sheraton Guildford	96
Mar-09	An End to Manual Effort in Excel: The Power Query Effect	9am-5pm	Sheraton Guildford	68

Terrace

Oct-17	Income Tax – Update 2019	9am-5pm	Best Western Terrace Inn	138
Oct-18	Code Decoded: Evolving Professional Ethical Expectations	8:30am-12:30pm	Best Western Terrace Inn	92

Victoria

Oct-21	Income Tax – Update 2019	9am-5pm	Marriott Inner Harbour	138
Oct-22	Income Tax – Income Splitting, a New Era	9am-12:30pm	Marriott Inner Harbour	136
Oct-22	NFPO – Review of the Standards	9am-5pm	Marriott Inner Harbour	53
Oct-23	Code Decoded: Evolving Professional Ethical Expectations	8:30am-12:30pm	Delta Ocean Pointe	92
Oct-24	Communicating With Influence	9am-5pm	Delta Ocean Pointe	84
Oct-28	Triple Your Reading Speed	9am-5pm	Marriott Inner Harbour	102
Oct-29	Strategic Management Certificate: Risk Management & Governance	9am-5pm	Marriott Inner Harbour	120
Nov-04	PSAS – Review of the Standards	9am-5pm	Marriott Inner Harbour	53
Nov-05	Becoming a Skilled Negotiator	9am-5pm	Marriott Inner Harbour	83
Nov-05	RIP – Estate Planning	9am-5pm	Marriott Inner Harbour	142
Nov-06	Corporate Restructuring – Fundamentals	9am-5pm	Marriott Inner Harbour	125
Nov-08	Strategic Management Certificate: Strategic Planning	9am-5pm	Marriott Inner Harbour	120
Nov-12	Excel: The Next Level of Skills	9am-5pm	Victoria Conference Centre	73
Nov-13	Income Tax – Update 2019	9am-5pm	Victoria Conference Centre	138
Nov-13	The Simplest Personal Finance Strategy Ever	9am-5pm	Victoria Conference Centre	150
Nov-14	Advanced Strategic Management Certificate: Links	9am-5pm	Victoria Conference Centre	121
Nov-14	Corporate Tax – Purchase and Sale of a Business	9am-5pm	Victoria Conference Centre	127
Nov-15	Controllership – Strategic Leadership	9am-5pm	Victoria Conference Centre	57
Nov-15	Income Tax – Everyday Issues for General Practitioners	9am-5pm	Victoria Conference Centre	136
Nov-15	Tools for Communicating with Difficult People	9am-5pm	Victoria Conference Centre	87
Nov-18	Practical Tips for Controllers & CFOs	9am-5pm	Marriott Inner Harbour	61
Nov-18	PST – Review of Jurisdictional Sales Tax	9am-5pm	Marriott Inner Harbour	141
Nov-19	Audit Engagements – Application of the Standards Using PEG	9am-5pm	Marriott Inner Harbour	40
Nov-20	Cyber Security and Awareness	9am-12:30pm	Marriott Inner Harbour	70
Nov-21	Audit Engagements – Audit of a Simple Entity	9am-5pm	Marriott Inner Harbour	40
Nov-22	Compilation Engagements – Review of Section 9200	9am-12:30pm	Marriott Inner Harbour	42
Nov-22	GST/HST – Fundamentals	9am-5pm	Marriott Inner Harbour	132
Nov-25	Powerful Financial Analysis	9am-5pm	Victoria Conference Centre	60
Nov-26	Budgeting & Financial Management: Understanding Budgeting Variance Analysis & Forecasting	9am-5pm	Victoria Conference Centre	62
Nov-26	Effective & Essential Management Skills	9am-5pm	Victoria Conference Centre	106
Nov-27	Financial Modeling in Excel	9am-5pm	Victoria Conference Centre	76
Nov-27	Time Management: The Essentials of Productivity Skills	9am-5pm	Victoria Conference Centre	101
Nov-28	ASPE – Update 2019	9am-12:30pm	Victoria Conference Centre	49
Nov-28	ASNFPO – Update 2019	1:30pm-5pm	Victoria Conference Centre	45
Nov-29	IFRS – Update 2019	9am-12:30pm	Victoria Conference Centre	50
Nov-29	Assurance – Update 2019	1:30pm-5pm	Victoria Conference Centre	38
Dec-04	Advanced Strategic Management Certificate: Maps	9am-5pm	Comfort Inn & Suites	121
Dec-04	Business Ethics: It Starts With You	8:30am-12:30pm	Marriott Inner Harbour	92
Dec-04	Business Ethics: It Starts With You	1pm-5pm	Marriott Inner Harbour	92
Dec-04 & 05	Personal Tax – Review of Tax Planning	9am-5pm	Marriott Inner Harbour	140
Dec-05	PSAS – Update 2019	9am-12:30pm	Comfort Inn & Suites	54

Victoria continued

Dec-05	Coach Yourself First	9am-5pm	Marriott Inner Harbour	97
Dec-06	A Coach Approach to Problem Solving	9am-5pm	Marriott Inner Harbour	89
Dec-09	Paperless Office	9am-5pm	Marriott Inner Harbour	79
Dec-10	Blockchain and Emerging Technologies	9am-12:30pm	Marriott Inner Harbour	68
Dec-10	Business Valuations – Fundamentals	9am-5pm	Marriott Inner Harbour	63
Dec-10	Tech Tools and Gadgets for a More Efficient You	1:30pm-5pm	Marriott Inner Harbour	80
Dec-11	Employment Law & HR Practices	9am-5pm	Marriott Inner Harbour	117
Dec-13	An End to Manual Effort in Excel: The Power Query Effect	9am-5pm	Marriott Inner Harbour	68
Jan-20 & 21	Corporate Tax – Review of Tax Planning	9am-5pm	Marriott Inner Harbour	128
Jan-22	Income Tax – Update 2019	9am-5pm	Marriott Inner Harbour	138
Jan-28	Personal Tax – Compliance & Planning in T1 Preparation	9am-5pm	Marriott Inner Harbour	139
Feb-05	Becoming an Ethical Leader	8:30am-12:30pm	Comfort Inn & Suites	91
Feb-05	Shades of Grey: Ethics in the Workplace	1pm-5pm	Comfort Inn & Suites	94
Feb-07	Excel: The Next Level of Skills	9am-5pm	Marriott Inner Harbour	73
Feb-18	Strategic Management Certificate: Team Development	9am-5pm	Marriott Inner Harbour	120
Feb-24	Wiring Your Brain for High Impact Leadership	9am-5pm	Marriott Inner Harbour	114
Feb-26	Strategic Management Certificate: Change Management	9am-5pm	Marriott Inner Harbour	120

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 180)

Our Fall 2019/Winter 2020 program includes seminars until the middle of March. Our Spring/Summer 2020 Catalogue will be available in March, and will include seminars from May to August 2020.

ACCOUNTING & ASSURANCE

Audit & Assurance

Assurance – Compliance with Agreements, Statutes and Regulations	Nov 06	9am-12:30pm	Vancouver	Sutton Place	38
	Available Online				160
Assurance – Update 2019	Oct 17	1:30pm-5pm	Vancouver	Sutton Place	38
	Oct 21	1:30pm-5pm	Prince George	Ramada Plaza	
	Oct 28	1:30pm-5pm	Abbotsford	Best Western Plus Regency	
	Oct 31	1:30pm-5pm	Nanaimo	Best Western Dorchester	
	Nov 07	1:30pm-5pm	Kelowna	Ramada Hotel	
	Nov 13	1:30pm-5pm	Burnaby	Hilton Metrotown	
	Nov 18	1:30pm-5pm	Coquitlam	Executive Plaza	
	Nov 27	1:30pm-5pm	Surrey	Sheraton Guildford	
	Nov 29	1:30pm-5pm	Victoria	Victoria Conference Centre	
	Jan 28	9am-12:30am	Vancouver	Sutton Place	
	Available Online				160
Assurance - Update 2019 - Just Audits	Nov 12	10am-12pm	Vancouver	Sutton Place	39
	Feb 19	10am-12pm	Vancouver	Sutton Place	
Assurance - Update 2019 – Other Than Audits	Nov 12	1pm-3pm	Vancouver	Sutton Place	39
	Feb 19	1pm-3pm	Vancouver	Sutton Place	
Audit Engagements – Application of the Standards Using PEG	Nov 13	9am-5pm	Vancouver	Sutton Place	40
	Nov 19	9am-5pm	Victoria	Marriott Inner Harbour	
Audit Engagements – Audit of a Simple Entity	Oct 29	9am-5pm	Vancouver	Hyatt Regency	40
	Nov 21	9am-5pm	Victoria	Marriott Inner Harbour	
	Nov 25	9am-5pm	Kelowna	Coast Capri	
	Feb 10	9am-5pm	Vancouver	Sutton Place	
Audit Engagements – CAS 240: Risk Related to Fraud	Nov 07	1:30pm-5pm	Vancouver	Sutton Place	41
Audit Engagements – Review of the Standards	Nov 04-05	9am-5pm	Vancouver	Sutton Place	41
	Available Online				160
Compilation Engagements – Review of Section 9200	Oct 17	9am-12:30pm	Abbotsford	Best Western Plus Regency	42
	Nov 05	9am-12:30pm	Nanaimo	Best Western Dorchester	
	Nov 07	1:30pm-5pm	Courtenay	Old House Hotel	
	Nov 08	1:30pm-5pm	Vancouver	Sutton Place	
	Nov 14	1:30pm-5pm	Kelowna	Ramada Hotel	
	Nov 22	9am-12:30pm	Victoria	Marriott Inner Harbour	
	Dec 09	1:30pm-5pm	Surrey	Sheraton Guildford	
	Jan 27	9am-12:30pm	Vancouver	Sutton Place	
Fraud Happens – What to do When You Suspect Fraud	Dec 10	9am-5pm	Vancouver	Hyatt Regency	42
PD Nexus: Local Government Accounting & Auditing Workshop	Nov 21-22	8:30am-4:30pm	Vancouver	Coast Coal Harbour	153
Quality Control – Application of CSQC1	Nov 28	9am-12:30pm	Vancouver	Van Convention Centre West	43
Quality Control – Review of CSQC1	Available Online				160
Review Engagements – Application of the Standard	Dec 05	9am-5pm	Vancouver	Van Convention Centre West	44
	Feb 12	9am-5pm	Vancouver	Sutton Place	
	Available Online				160
Review Engagements – Specific Topics	Oct 24	9am-5pm	Vancouver	Sutton Place	44
	Nov 05	9am-5pm	Abbotsford	Best Western Plus Regency	
	Nov 15	9am-5pm	Kelowna	Ramada Hotel	
	Feb 06	9am-5pm	Vancouver	Sutton Place	

Financial Reporting

ASNFPO – Update 2019	Oct 22	9am-12:30pm	Prince George	Ramada Plaza	45
	Nov 06	1:30pm-5pm	Parksville	The Beach Club Resort	
	Nov 14	9am-12:30pm	Kelowna	Ramada Hotel	
	Nov 14	9am-12:30pm	Vancouver	Van Convention Centre West	
	Nov 27	9am-12:30pm	Surrey	Sheraton Guildford	
	Nov 28	1:30pm-5pm	Victoria	Victoria Conference Centre	
	Dec 12	9am-12:30pm	Vancouver	Sutton Place	
ASPE – Comparison to IFRS	Dec 13	9am-5pm	Vancouver	Four Seasons	45
ASPE – Construction Industry	Nov 08	9am-12:30pm	Vancouver	Sutton Place	46
	Dec 09	9am-12:30pm	Surrey	Sheraton Guildford	
	Jan 24	9am-12:30pm	Vancouver	Sutton Place	
ASPE – Disclosure and Presentation	Oct 30	9am-5pm	Abbotsford	Best Western Plus Regency	46
	Oct 30	9am-5pm	Nanaimo	Best Western Dorchester	
	Nov 07	9am-5pm	Vancouver	Four Seasons	
ASPE – Real Estate Industry	Oct 25	9am-5pm	Vancouver	Sutton Place	47
	Nov 04	9am-5pm	Surrey	Sheraton Guildford	
	Feb 06	9am-5pm	Vancouver	Sutton Place	
ASPE – Related Party Transactions	Dec 04	9am-5pm	Vancouver	Van Convention Centre West	47
ASPE – Review of the Standards	Nov 19-20	9am-5pm	Vancouver	Sutton Place	48
	Feb 24-25	9am-5pm	Vancouver	Sutton Place	
	Available Online				160
ASPE – Strategic Investments	Nov 15	9am-5pm	Vancouver	Sutton Place	48
	Available Online				160
ASPE – Update 2019	Oct 17	9am-12:30pm	Vancouver	Sutton Place	49
	Oct 21	9am-12:30pm	Prince George	Ramada Plaza	
	Oct 28	9am-12:30pm	Abbotsford	Best Western Plus Regency	
	Oct 28	9am-12:30pm	Kamloops	Coast Kamloops	
	Oct 31	9am-12:30pm	Nanaimo	Best Western Dorchester	
	Nov 01	9am-12:30pm	Surrey	Sheraton Guildford	
	Nov 06	9am-12:30pm	Parksville	The Beach Club Resort	
	Nov 07	9am-12:30pm	Courtenay	Old House Hotel	
	Nov 07	9am-12:30pm	Kelowna	Ramada Hotel	
	Nov 13	9am-12:30pm	Burnaby	Hilton Metrotown	
	Nov 15	9am-12:30pm	Richmond	Executive Airport Plaza	
	Nov 18	9am-12:30pm	Coquitlam	Executive Plaza	
	Nov 28	9am-12:30pm	Victoria	Victoria Conference Centre	
	Dec 03	9am-12:30pm	Vancouver	Van Convention Centre West	
	Jan 24	1:30pm-5pm	Vancouver	Sutton Place	
	Available Online				160
IFRS – Disclosure and Presentation	Nov 27-28	9am-5pm	Vancouver	Van Convention Centre West	49
IFRS – Review of the Standards	Dec 09-10	9am-5pm	Vancouver	Sutton Place	50
	Available Online				160
IFRS – Update 2019	Oct 23	9am-12:30pm	Vancouver	Sutton Place	50
	Nov 01	1:30pm-5pm	Surrey	Sheraton Guildford	
	Nov 29	9am-12:30pm	Victoria	Victoria Conference Centre	
	Dec 02	9am-12:30pm	Vancouver	Van Convention Centre West	
	Available Online				160
IFRS 9 – Financial Instruments	Nov 13	9am-5pm	Vancouver	Sutton Place	51
	Feb 21	9am-5pm	Vancouver	Sutton Place	
	Available Online				160
IFRS 15 – Revenue Recognition	Dec 05	9am-5pm	Vancouver	Van Convention Centre West	51
IFRS 16 – Leases	Nov 07	9am-5pm	Vancouver	Hyatt Regency	52
	Feb 20	9am-5pm	Vancouver	Sutton Place	
	Available Online				160
NFPO – Disclosure and Presentation	Dec 03	9am-5pm	Vancouver	Van Convention Centre West	52

NFPO – Review of the Standards	Oct 22	9am-5pm	Victoria	Marriott Inner Harbour	53
	Nov 04	9am-5pm	Nanaimo	Best Western Dorchester	
	Nov 26	9am-5pm	Kelowna	Coast Capri	
	Dec 02	9am-5pm	Vancouver	Van Convention Centre West	
	Available Online				160
PSAS – Review of the Standards	Nov 04	9am-5pm	Victoria	Marriott Inner Harbour	53
	Nov 25	9am-5pm	Vancouver	Van Convention Centre West	
PSAS – Specific Topics	Dec 02	9am-5pm	Vancouver	Van Convention Centre West	54
PSAS – Update 2019	Oct 25	9am-12:30pm	Vancouver	Sutton Place	54
	Nov 04	1:30pm-5pm	Kelowna	Coast Capri	
	Dec 05	9am-12:30pm	Victoria	Comfort Inn & Suites	
	Jan 29	9am-12:30pm	Vancouver	Sutton Place	
Public Company Reporting – Annual Update	Nov 26	9am-12:30pm	Vancouver	Sutton Place	55

Management Accounting & Financial Management

Advanced Financial Statement Analysis	Nov 26	9am-5pm	Vancouver	Van Convention Centre West	55
Building Enterprise Performance Dashboards	Nov 29	9am-5pm	Vancouver	Van Convention Centre West	56
Controllership – Operational Management	Nov 08	9am-5pm	Surrey	Sheraton Guildford	56
	Nov 13	9am-5pm	Kelowna	Ramada Hotel	
	Dec 06	9am-5pm	Vancouver	Van Convention Centre West	
	Mar 12	9am-5pm	Vancouver	Sutton Place	
Controllership – Strategic Leadership	Nov 15	9am-5pm	Victoria	Victoria Conference Centre	57
	Nov 22	9am-5pm	Vancouver	Hyatt Regency	
	Dec 10	9am-5pm	Surrey	Sheraton Guildford	
	Mar 13	9am-5pm	Vancouver	Sutton Place	
Effective Financial Analysis for Business Decisions – Small Businesses	Nov 28	9am-5pm	Vancouver	Van Convention Centre West	57
Fraud Risk Management	Nov 08	9am-5pm	Surrey	Sheraton Guildford	58
	Nov 25	9am-5pm	Vancouver	Van Convention Centre West	
Internal Control Refresher for Financial Managers	Nov 15	9am-5pm	Vancouver	Four Seasons	58
Internal Controls – Industry Sector	Nov 14	9am-5pm	Vancouver	Van Convention Centre West	59
Management Accounting – Fundamentals	Dec 05	9am-5pm	Vancouver	Van Convention Centre West	59
Marketing Your Business Without Breaking the Bank	Dec 04	9am-5pm	Kelowna	Ramada Hotel	60
	Feb 12	9am-5pm	Vancouver	Sutton Place	
	Feb 20	9am-5pm	Surrey	Sheraton Guildford	
Powerful Financial Analysis	Nov 18	9am-5pm	Kelowna	Coast Capri	60
	Nov 22	9am-5pm	Kamloops	Coast Kamloops	
	Nov 25	9am-5pm	Victoria	Victoria Conference Centre	
	Nov 27	9am-5pm	Vancouver	Van Convention Centre West	
	Nov 29	9am-5pm	Abbotsford	Quality Hotel	
Practical Tips for Controllers & CFOs	Nov 18	9am-5pm	Victoria	Marriott Inner Harbour	61
	Nov 19	9am-5pm	Vancouver	Hyatt Regency	
	Nov 20	9am-5pm	Surrey	Sheraton Guildford	
Writing & Maintaining Task-Based Procedures	Dec 04	9am-5pm	Vancouver	Van Convention Centre West	61

FINANCE

Budgeting & Financial Management: Understanding Budgeting Variance Analysis & Forecasting	Oct 22	9am-5pm	Abbotsford	Best Western Plus Regency	62
	Oct 23	9am-5pm	Coquitlam	Executive Plaza	
	Nov 05	9am-5pm	Surrey	Sheraton Guildford	
	Nov 12	9am-5pm	Kelowna	Ramada Hotel	
	Nov 18	9am-5pm	Vancouver	Van Convention Centre East	
	Nov 26	9am-5pm	Victoria	Victoria Conference Centre	
	Dec 04	9am-5pm	Vancouver	Van Convention Centre West	
	Feb 04	9am-5pm	Vancouver	Sutton Place	

Business Valuations – Fundamentals	Oct 28	9am-5pm	Vancouver	Sutton Place	63
	Nov 07	9am-5pm	Parksville	The Beach Club Resort	
	Nov 12	9am-5pm	Coquitlam	Executive Plaza	
	Nov 14	9am-5pm	Surrey	Sheraton Guildford	
	Nov 15	9am-5pm	Abbotsford	Best Western Plus Regency	
	Nov 20	9am-5pm	Kelowna	Coast Capri	
	Dec 10	9am-5pm	Victoria	Marriott Inner Harbour	
	Feb 11	9am-5pm	Vancouver	Sutton Place	
Business Valuations – Advanced	Dec 13	9am-5pm	Vancouver	Hyatt Regency	63
Business Valuations – Purchase Price Allocation	Dec 02	9am-5pm	Vancouver	Van Convention Centre West	64
	Feb 24	9am-5pm	Vancouver	Sutton Place	
Cash and Treasury Management	Nov 13	9am-5pm	Vancouver	Sutton Place	64
Corporate Finance	Dec 10	9am-5pm	Vancouver	Hyatt Regency	65
Due Diligence for Acquisitions	Nov 29	9am-5pm	Vancouver	Van Convention Centre West	65
Financing Strategies	Dec 12	9am-5pm	Vancouver	Sutton Place	66
Treasury & Finance for Accountants	Nov 28	9am-5pm	Surrey	Sheraton Guildford	66

INFORMATION & BUSINESS TECHNOLOGY

Advanced Data Magic with Excel	Feb 10	9am-5pm	Vancouver	Sutton Place	67
An End to Manual Effort in Excel: The Power Query Effect	Dec 09	9am-5pm	Coquitlam	Executive Plaza	68
	Dec 13	9am-5pm	Victoria	Marriott Inner Harbour	
	Mar 09	9am-5pm	Surrey	Sheraton Guildford	
	Mar 12	9am-5pm	Vancouver	Sutton Place	
Blockchain and Emerging Technologies	Nov 19	9am-12:30pm	Kelowna	Coast Capri	68
	Dec 10	9am-12:30pm	Victoria	Marriott Inner Harbour	
	Feb 03	9am-12:30pm	Surrey	Sheraton Guildford	
Building a Financial Model of a Company	Nov 25	9am-5pm	Vancouver	Van Convention Centre West	69
	Mar 03	9am-5pm	Vancouver	Sutton Place	
Cloud Computing: The Future is Here	Feb 04	9am-5pm	Surrey	Sheraton Guildford	69
	Feb 06	9am-5pm	Vancouver	Sutton Place	
Creating Vibrant Dashboards	Oct 24	9am-5pm	Vancouver	Sutton Place	70
Cyber Security and Awareness	Nov 20	9am-12:30pm	Victoria	Marriott Inner Harbour	70
	Dec 04	9am-12:30pm	Vancouver	Van Convention Centre West	
Data Analysis & Communication with Excel	Nov 28	9am-5pm	Vancouver	Van Convention Centre West	71
	Mar 05	9am-5pm	Vancouver	Sutton Place	
DAX Formulas for PowerPivot	Feb 07	9am-5pm	Vancouver	Sutton Place	71
Excel: Specific Skills for Budgeting, Planning & Forecasting	Dec 03	9am-5pm	Vancouver	Van Convention Centre West	72
	Feb 18	9am-5pm	Vancouver	Sutton Place	
Excel: Specific Skills for Creating Custom Solutions with Macros	Nov 18	9am-5pm	Vancouver	Sutton Place	72
	Mar 06	9am-5pm	Vancouver	Sutton Place	
Excel: The Next Level of Skills	Nov 06	9am-5pm	Abbotsford	Quality Hotel	73
	Nov 12	9am-5pm	Victoria	Victoria Conference Centre	
	Nov 15	9am-5pm	Kelowna	Ramada Hotel	
	Nov 25	9am-5pm	Coquitlam	Executive Plaza	
	Dec 02	9am-5pm	Vancouver	Van Convention Centre West	
	Feb 07	9am-5pm	Victoria	Marriott Inner Harbour	
	Feb 26	9am-5pm	Vancouver	Sutton Place	
Excel Boot Camp	Feb 11-12	9am-5pm	Vancouver	Sutton Place	73
Excel Data Magic, Including Advanced PivotTables & Power Pivot	Nov 28	9am-5pm	Vancouver	Van Convention Centre West	74
Excel Financial Models and Analysis	Oct 10	9am-5pm	Castlegar	Super 8 Castlegar	74
	Oct 28	9am-5pm	Kamloops	Coast Kamloops	
	Nov 20	9am-5pm	Coquitlam	Executive Plaza	
	Dec 06	9am-5pm	Vancouver	Van Convention Centre West	
	Feb 25	9am-5pm	Vancouver	Sutton Place	

Excel Tips, Tricks and Techniques for Accountants	Nov 29	9am-5pm	Vancouver	Van Convention Centre West	75
	Dec 02	9am-5pm	Courtenay	Old House Hotel	
Financial Modeling – DCF Valuation Analysis	Nov 26	9am-5pm	Vancouver	Van Convention Centre West	75
Financial Modeling in Excel	Nov 06	9am-5pm	Surrey	Sheraton Guildford	76
	Nov 19	9am-5pm	Vancouver	Four Seasons	
	Nov 27	9am-5pm	Victoria	Victoria Conference Centre	
	Feb 04	9am-5pm	Vancouver	Sutton Place	
Getting Started with Excel PowerPivot	Feb 06	9am-5pm	Surrey	Sheraton Guildford	76
	Mar 11	9am-5pm	Vancouver	Sutton Place	
Google is Not Enough: The Best Search Tools You Aren't Using (But Should!)	Dec 03	9am-5pm	Surrey	Sheraton Guildford	77
	Dec 11	9am-5pm	Vancouver	Sutton Place	
Intro-Mediate Excel Techniques	Dec 10	9am-5pm	Vancouver	Sutton Place	77
Managing Financial Data With Excel	Nov 27	9am-5pm	Vancouver	Van Convention Centre West	78
	Mar 04	9am-5pm	Vancouver	Sutton Place	
Modeling Project Finance: Real Estate	Dec 03	9am-5pm	Vancouver	Van Convention Centre West	78
Optimizing Data for Power Pivot using Power Query	Dec 11	9am-5pm	Vancouver	Sutton Place	79
Paperless Office	Nov 18	9am-5pm	Kelowna	Coast Capri	79
	Dec 09	9am-5pm	Victoria	Marriott Inner Harbour	
	Dec 11	9am-5pm	Abbotsford	Quality Hotel	
	Feb 05	9am-5pm	Vancouver	Sutton Place	
Rapid Dashboard Development with Power BI Desktop	Oct 22	9am-5pm	Vancouver	Sutton Place	80
	Mar 10	9am-5pm	Vancouver	Sutton Place	
Tech Tools and Gadgets for a More Efficient You	Dec 10	1:30pm-5pm	Victoria	Marriott Inner Harbour	80
	Feb 07	1:30pm-5pm	Vancouver	Sutton Place	
Technology Update	Nov 20	9am-12:30pm	Burnaby	Hilton Metrotown	81
	Feb 07	9am-12:30pm	Vancouver	Sutton Place	
Word, Outlook, and PowerPoint: Tips and Tricks for Enhancing Productivity	Nov 19	1:30pm-5pm	Kelowna	Coast Capri	81
	Nov 20	1:30pm-5pm	Burnaby	Hilton Metrotown	
	Feb 03	1:30pm-5pm	Surrey	Sheraton Guildford	

PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT

Communication & Negotiation

Becoming a Skilled Negotiator	Oct 31	9am-5pm	Vancouver	Sutton Place	83
	Nov 05	9am-5pm	Victoria	Marriott Inner Harbour	
	Feb 05	9am-5pm	Vancouver	Sutton Place	
Clear Thinking/Clear Speaking	Dec 11	9am-5pm	Vancouver	Hyatt Regency	83
	Mar 03	9am-5pm	Vancouver	Sutton Place	
Communicating Effectively Under Pressure	Nov 04	9am-5pm	Surrey	Sheraton Guildford	84
	Nov 08	9am-5pm	Prince George	Ramada Plaza	
	Nov 13	9am-5pm	Coquitlam	Executive Plaza	
	Dec 02	9am-5pm	Vancouver	Van Convention Centre West	
	Feb 27	9am-5pm	Vancouver	Sutton Place	
Communicating with Influence	Oct 24	9am-5pm	Victoria	Delta Ocean Pointe	84
	Nov 21	9am-5pm	Kelowna	Coast Capri	
	Dec 05	9am-5pm	Vancouver	Van Convention Centre West	
	Dec 06	9am-5pm	Surrey	Sheraton Guildford	
Conflict: Changing Viewpoints & Influencing Behaviors	Oct 29	9am-5pm	Vancouver	Sutton Place	85
Creating Healthy Conflict in the Workplace	Feb 19	9am-5pm	Vancouver	Sutton Place	85
Presentation Skills for Introvert Accountants	Nov 08	9am-5pm	Abbotsford	Best Western Plus Regency	86
	Nov 18	9am-5pm	Surrey	Sheraton Guildford	
	Nov 29	9am-5pm	Vancouver	Van Convention Centre West	
	Dec 05	9am-5pm	Kelowna	Ramada Hotel	
Principles of Negotiation	Nov 25	9am-12:30pm	Vancouver	Van Convention Centre West	86

Sharpening Your Business Writing Skills	Nov 26	9am-5pm	Vancouver	Van Convention Centre West	87
	Feb 20	9am-5pm	Vancouver	Sutton Place	
Tools for Communicating with Difficult People	Nov 06	9am-5pm	Kelowna	Ramada Hotel	87
	Nov 15	9am-5pm	Victoria	Victoria Conference Centre	
	Nov 25	9am-5pm	Courtenay	Old House Hotel	
	Dec 03	9am-5pm	Vancouver	Van Convention Centre West	
Transforming the Way You Sell Yourself	Dec 04	9am-5pm	Vancouver	Van Convention Centre West	88
You're Speaking – But Are You Connecting?	Nov 14	9am-12:30pm	Surrey	Sheraton Guildford	88
	Nov 21	9am-12:30pm	Vancouver	Four Seasons	

Problem-Solving & Decision-Making

A Coach Approach to Problem Solving	Nov 07	9am-5pm	Surrey	Sheraton Guildford	89
	Nov 21	9am-5pm	Vancouver	Four Seasons	
	Dec 06	9am-5pm	Victoria	Marriott Inner Harbour	
Achieving Results Through Collaborative Projects	Nov 27	9am-5pm	Vancouver	Van Convention Centre West	89
Project Management: Tips & Traps	Nov 26	9am-5pm	Vancouver	Van Convention Centre West	90
Thinking Beyond the Box – Part 1	Mar 18	9am-5pm	Vancouver	Sutton Place	90
Thinking Beyond the Box – Part 2	Mar 19	9am-5pm	Vancouver	Sutton Place	91

Professional & Ethical Behaviour

Becoming an Ethical Leader	Oct 24	8:30am-12:30pm	Richmond	Sandman Signature Airport	91
	Nov 07	8:30am-12:30pm	Surrey	Sheraton Guildford	
	Nov 13	8:30am-12:30pm	Kelowna	Ramada Hotel	
	Nov 28	8:30am-12:30pm	Vancouver	Van Convention Centre West	
	Dec 09	8:30am-12:30pm	Vancouver	Sutton Place	
	Feb 05	8:30am-12:30pm	Vancouver	Sutton Place	
	Feb 05	8:30am-12:30pm	Victoria	Comfort Inn & Suites	
Business Ethics: It Starts With You	Oct 17	8:30am-12:30pm	Surrey	Sheraton Guildford	92
	Oct 17	1pm-5pm	Surrey	Sheraton Guildford	
	Oct 22	8:30am-12:30pm	Coquitlam	Executive Plaza	
	Oct 22	1pm-5pm	Coquitlam	Executive Plaza	
	Oct 24	8:30am-12:30pm	Burnaby	Holiday Inn Express	
	Oct 24	1pm-5pm	Burnaby	Holiday Inn Express	
	Nov 05	8:30am-12:30pm	Vancouver	Four Seasons	
	Nov 05	1pm-5pm	Vancouver	Four Seasons	
	Nov 07	8:30am-12:30pm	Prince George	Ramada Plaza	
	Nov 07	1pm-5pm	Prince George	Ramada Plaza	
	Dec 04	8:30am-12:30pm	Victoria	Marriott Inner Harbour	
	Dec 04	1pm-5pm	Victoria	Marriott Inner Harbour	
	Feb 12	8:30am-12:30pm	Surrey	Sheraton Guildford	
	Feb 12	1pm-5pm	Surrey	Sheraton Guildford	
	Feb 20	8:30am-12:30pm	Richmond	Executive Airport Plaza	
	Feb 20	1pm-5pm	Richmond	Executive Airport Plaza	
	Mar 11	8:30am-12:30pm	Vancouver	Sutton Place	
	Mar 11	1pm-5pm	Vancouver	Sutton Place	
Code Decoded: Evolving Professional Ethical Expectations	Oct 11	8:30am-12:30pm	Fort St John	Northern Grand	92
	Oct 11	8:30am-12:30pm	Vancouver	Sutton Place	
	Oct 18	8:30am-12:30pm	Terrace	Best Western Terrace Inn	
	Oct 23	8:30am-12:30pm	Victoria	Delta Ocean Pointe	
	Oct 30	8:30am-12:30pm	Vancouver	Sutton Place	
	Nov 13	1pm-5pm	Courtenay	Old House Hotel	
	Nov 14	8:30am-12:30pm	Parksville	Quality Resort Bayside	
	Nov 15	8:30am-12:30pm	Nanaimo	Vancouver Island Conf Ctr	
	Nov 20	8:30am-12:30pm	Burnaby	Hilton Metrotown	
	Nov 20	8:30am-12:30pm	Kamloops	Coast Kamloops	
	Nov 22	8:30am-12:30pm	Kelowna	Coast Capri	
	Nov 27	1pm-5pm	Vancouver	Van Convention Centre West	

Code Decoded: Evolving Professional Ethical Expectations (continued)	Nov 29	8:30am-12:30pm	Vancouver	Van Convention Centre West	
	Nov 30	8:30am-12:30pm	Vancouver	Van Convention Centre West	
	Dec 02	8:30am-12:30pm	Vancouver	Van Convention Centre West	
	Dec 03	8:30am-12:30pm	Abbotsford	Best Western Plus Regency	
	Dec 04	8:30am-12:30pm	Coquitlam	Executive Plaza	
	Dec 05	8:30am-12:30pm	Surrey	Sheraton Guildford	
	Dec 10	8:30am-12:30pm	Richmond	Executive Airport Plaza	
	Dec 11	8:30am-12:30pm	Vancouver	Sutton Place	
	Dec 13	8:30am-12:30pm	Vancouver	Four Seasons	
	Feb 26	8:30am-12:30pm	Coquitlam	Executive Plaza	
Ethical Leadership in an Age of AI	Nov 27	8:30am-12:30pm	Vancouver	Van Convention Centre West	93
	Feb 25	8:30am-12:30pm	Vancouver	Sutton Place	
Ethics at our Core	Oct 22	8:30am-12:30pm	Vancouver	Sutton Place	93
	Nov 07	8:30am-12:30pm	Abbotsford	Best Western Plus Regency	
	Nov 07	8:30am-12:30pm	Richmond	Sandman Signature Airport	
	Nov 29	8:30am-12:30pm	Coquitlam	Executive Plaza	
	Dec 07	8:30am-12:30pm	Vancouver	Van Convention Centre West	
	Mar 09	8:30am-12:30pm	Vancouver	Sutton Place	
	Mar 10	8:30am-12:30pm	Burnaby	Hilton Metrotown	
Gateway to Membership: Welcome to the Pros	Oct 21	9am-5pm	Vancouver	Sutton Place	94
	Nov 25	9am-5pm	Vancouver	Van Convention Centre West	
Shades of Grey: Ethics in the Workplace	Oct 24	1pm-5pm	Richmond	Sandman Signature Airport	94
	Nov 07	1pm-5pm	Surrey	Sheraton Guildford	
	Nov 13	1pm-5pm	Kelowna	Ramada Hotel	
	Nov 28	1pm-5pm	Vancouver	Van Convention Centre West	
	Dec 09	1pm-5pm	Vancouver	Sutton Place	
	Feb 05	1pm-5pm	Vancouver	Sutton Place	
	Feb 05	1pm-5pm	Victoria	Comfort Inn & Suites	
Understanding and Embracing Ethics in the Workplace	Oct 24	8:30am-12:30pm	Vancouver	Sutton Place	95
	Nov 14	8:30am-12:30pm	Vancouver	Van Convention Centre West	
	Dec 04	8:30am-12:30pm	Vancouver	Van Convention Centre West	
	Mar 05	8:30am-12:30pm	Vancouver	Sutton Place	

Self Management

Balancing Your Wheels	Dec 04	9am-5pm	Vancouver	Van Convention Centre West	95
Becoming...what you really want to be	Oct 31	9am-5pm	Vancouver	Sutton Place	96
Brain Focus: The Power of Full Engagement	Nov 12	9am-12:30pm	Vancouver	Sutton Place	96
	Mar 04	9am-12:30pm	Surrey	Sheraton Guildford	
Break Free of the Box: Creative Solutions to Workplace Challenges	Dec 05	9am-5pm	Vancouver	Van Convention Centre West	97
Coach Yourself First	Dec 05	9am-5pm	Victoria	Marriott Inner Harbour	97
	Dec 11	9am-5pm	Vancouver	Sutton Place	
Critical Thinking and Self Reflection	Oct 30	9am-5pm	Kelowna	Ramada Hotel	98
	Nov 19	9am-5pm	Vancouver	Four Seasons	
	Dec 12	9am-5pm	Surrey	Sheraton Guildford	
Emotional Intelligence in the Workplace	Nov 22	9am-5pm	Vancouver	Sutton Place	98
Influence and Assertiveness	Nov 26	9am-5pm	Abbotsford	Quality Hotel	99
	Mar 04	9am-5pm	Vancouver	Sutton Place	
PD Nexus: Beyond Financial Reporting Insights	Oct 23	8:30am-4:30pm	Vancouver	Van Convention Centre West	152
PD Nexus: Business Insights Kelowna	Oct 25	8:30am-4:30pm	Kelowna	Coast Capri	152
PD Nexus: Business Insights Vancouver	Dec 06	8:30am-4:30pm	Vancouver	Van Convention Centre West	153
PD Nexus: Maximizing Diversity & Inclusion	Nov 19	8:30am-4:30pm	Vancouver	Van Convention Centre West	154
Personal Effectiveness: Self Awareness and Balanced Thinking	Dec 10	9am-5pm	Vancouver	Sutton Place	99
	Mar 10	9am-5pm	Vancouver	Sutton Place	
Play with Your Mind: Growth Mindset	Nov 07	9am-5pm	Vancouver	Sutton Place	100
Professional Presence	Dec 03	9am-5pm	Vancouver	Van Convention Centre West	100

The Four Intelligences: Leveraging the Whole Self in Change	Nov 15	9am-12:30pm	Vancouver	Four Seasons	101
Time Management: The Essentials of Productivity Skills	Nov 27	9am-5pm	Victoria	Victoria Conference Centre	101
	Dec 13	9am-5pm	Vancouver	Hyatt Regency	
Triple Your Reading Speed	Oct 28	9am-5pm	Victoria	Marriott Inner Harbour	102
	Nov 20	9am-5pm	Vancouver	Hyatt Regency	
	Nov 27	9am-5pm	Surrey	Sheraton Guildford	
What is Your Happiness Practice? It's Time to Ditch the Stress and Find Real Happiness	Nov 08	9am-5pm	Vancouver	Sutton Place	102

Teamwork & Leadership

Becoming a High Performance Team Member	Feb 13	9am-5pm	Vancouver	Sutton Place	103
Bridging the Generational Divide	Nov 22	9am-12:30pm	Vancouver	Sutton Place	103
Building High Performance Teams	Oct 30	9am-5pm	Vancouver	Sutton Place	104
Coaching for Executive Excellence	Dec 02	9am-5pm	Vancouver	Van Convention Centre West	104
Dispelling the Myth of "Effective Meetings"	Dec 12	9am-12:30pm	Vancouver	Sutton Place	105
Doing Business as Unusual	Mar 17	9am-5pm	Vancouver	Sutton Place	105
Dynamic Leadership: Adjusting Your Leadership Style to the Situation	Nov 29	9am-5pm	Vancouver	Van Convention Centre West	106
Effective & Essential Management Skills	Oct 24	9am-5pm	Kelowna	Ramada Hotel	106
	Nov 26	9am-5pm	Victoria	Victoria Conference Centre	
	Dec 04	9am-5pm	Vancouver	Van Convention Centre West	
Enhancing Your Management Skills	Dec 10	9am-12:30pm	Surrey	Sheraton Guildford	107
	Feb 21	9am-12:30pm	Vancouver	Sutton Place	
Empowering and Engaging Other	Nov 06	9am-5pm	Prince George	Ramada Plaza	107
	Dec 09	9am-5pm	Vancouver	Sutton Place	
	Feb 19	9am-5pm	Surrey	Sheraton Guildford	
Enhancing Your Leadership Impact	Dec 05	9am-5pm	Vancouver	Van Convention Centre West	108
How to Achieve Your Company Vision Through Effective Performance Review	Nov 13	9am-12:30pm	Vancouver	Sutton Place	108
Influencing Without Authority	Mar 10	9am-5pm	Vancouver	Sutton Place	109
Leaders as Role Models	Nov 20	9am-12:30pm	Vancouver	Four Seasons	109
Leadership and Coaching	Oct 31	9am-5pm	Kelowna	Ramada Hotel	110
	Nov 21	9am-5pm	Coquitlam	Executive Plaza	
	Dec 06	9am-5pm	Vancouver	Van Convention Centre West	
	Feb 13	9am-5pm	Surrey	Sheraton Guildford	
Leadership in a Changing World	Nov 28	9am-5pm	Vancouver	Van Convention Centre West	110
Leading Sustainable Change: Make it Happen and Make it Stick	Nov 28	1:30pm-5pm	Vancouver	Van Convention Centre West	111
Make Change Stick: Getting Results by Changing the Inner Game	Dec 13	9am-5pm	Vancouver	Four Seasons	111
Managing My People	Nov 01	9am-5pm	Vancouver	Sutton Place	112
Managing Transitions: Leading the People Side of Change	Nov 28	9am-12:30pm	Vancouver	Van Convention Centre West	112
Seven Steps to Successful Virtual Teamwork	Mar 05	9am-5pm	Vancouver	Sutton Place	113
Systems Thinking & Resolving Complex Issues in Complex Environments	Nov 27	9am-5pm	Vancouver	Van Convention Centre West	113
Wiring Your Brain for High Impact Leadership	Nov 29	9am-5pm	Vancouver	Van Convention Centre West	114
	Feb 19	9am-5pm	Vancouver	Sutton Place	
	Feb 24	9am-5pm	Victoria	Marriott Inner Harbour	
	Feb 26	9am-5pm	Surrey	Sheraton Guildford	

PUBLIC PRACTICE MANAGEMENT

Considering Starting a CPA Practice	Available Online				161
PD Nexus: Public Practice Insights	Nov 26	8:30am-4:30pm	Vancouver	Van Convention Centre West	154
Starting a Successful CPA Practice	Dec 09	9am-5pm	Vancouver	Sutton Place	115

STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE

An Introduction to Strategy Driven Budgeting	Nov 05	9am-5pm	Kelowna	Coast Capri	116
	Nov 25	9am-5pm	Vancouver	Van Convention Centre West	
Employment Law & HR Practices	Oct 25	9am-5pm	Surrey	Civic Hotel	117
	Nov 13	9am-5pm	Abbotsford	Best Western Plus Regency	
	Nov 27	9am-5pm	Vancouver	Van Convention Centre West	
	Dec 11	9am-5pm	Victoria	Marriott Inner Harbour	
Handling Termination of Employment	Dec 10	8am-10am	Vancouver	Sutton Place	117
	Available Online				162
NFPO – Governance	Dec 06	9am-12:30pm	Vancouver	Van Convention Centre West	118
Strategy and Risk Management for Financial Managers	Nov 14	9am-5pm	Vancouver	Van Convention Centre West	118
Top Employment Issues Affecting Your Bottom Line	Dec 03	9am-12:30pm	Vancouver	Van Convention Centre West	119
	Available Online				163

Strategic Management Certificate & Advanced Strategic Management Certificate Programs

Strategic Management Certificate: Strategic Planning	Oct 22	9am-5pm	Vancouver	Sutton Place	120
	Nov 08	9am-5pm	Victoria	Marriott Inner Harbour	
	Dec 09	9am-5pm	Vancouver	Sutton Place	
	Feb 19	9am-5pm	Vancouver	Sutton Place	
Strategic Management Certificate: Risk Management & Governance	Oct 29	9am-5pm	Victoria	Marriott Inner Harbour	120
	Nov 26	9am-5pm	Vancouver	Van Convention Centre West	
	Feb 26	9am-5pm	Vancouver	Sutton Place	
Strategic Management Certificate: Team Development	Nov 25	9am-5pm	Vancouver	Van Convention Centre West	120
	Feb 18	9am-5pm	Victoria	Marriott Inner Harbour	
	Feb 25	9am-5pm	Vancouver	Sutton Place	
Strategic Management Certificate: Change Management	Oct 23	9am-5pm	Vancouver	Sutton Place	120
	Feb 20	9am-5pm	Vancouver	Sutton Place	
	Feb 26	9am-5pm	Victoria	Marriott Inner Harbour	
Advanced Strategic Management Certificate: Links	Nov 14	9am-5pm	Victoria	Victoria Conference Centre	121
	Nov 27	9am-5pm	Vancouver	Van Convention Centre West	
	Mar 16	9am-5pm	Vancouver	Sutton Place	
Advanced Strategic Management Certificate: Maps	Dec 04	9am-5pm	Victoria	Comfort Inn & Suites	121
	Dec 10	9am-5pm	Vancouver	Sutton Place	
	Mar 17	9am-5pm	Vancouver	Sutton Place	

TAXATION

Advanced Tax Planning for Business Succession	Nov 07	9am-5pm	Vancouver	Hyatt Regency	123
Advanced Tax Planning Strategies	Oct 22	9am-5pm	Kelowna	Coast Capri	123
	Nov 14	9am-5pm	Courtenay	Old House Hotel	
	Nov 27	9am-5pm	Vancouver	Van Convention Centre West	
	Dec 05	9am-5pm	Surrey	Sheraton Guildford	
	Jan 30	9am-5pm	Vancouver	Sutton Place	
An Introduction to FAPI	Nov 22	8am-10am	Vancouver	Sutton Place	124
	Available Online				164
Corporate Restructuring – Application for Private Corporations	Nov 06	9am-12:30pm	Vancouver	Sutton Place	124
Corporate Restructuring – Fundamentals	Nov 06	9am-5pm	Victoria	Marriott Inner Harbour	125
	Nov 13	9am-5pm	Vancouver	Hyatt Regency	
	Nov 20	9am-5pm	Kelowna	Coast Capri	
Corporate Restructuring – Section 85: Transfer of Property	Dec 04	9am-5pm	Vancouver	Van Convention Centre West	125
	Feb 18	9am-5pm	Vancouver	Sutton Place	

Corporate Tax – Compliance & Planning in T2 Preparation	Dec 09	9am-5pm	Abbotsford	Quality Hotel	126
	Dec 09	9am-5pm	Coquitlam	Executive Plaza	
	Dec 11	9am-5pm	Vancouver	Hyatt Regency	
	Feb 07	9am-5pm	Surrey	Sheraton Guildford	
Corporate Tax – Investment Holding Companies	Nov 29	9am-12:30pm	Vancouver	Van Convention Centre West	126
Corporate Tax – Purchase and Sale of a Business	Nov 14	9am-5pm	Victoria	Victoria Conference Centre	127
	Nov 22	9am-5pm	Kelowna	Coast Capri	
	Dec 06	9am-5pm	Vancouver	Van Convention Centre West	
	Dec 11	9am-5pm	Surrey	Sheraton Guildford	
	Jan 29	9am-5pm	Vancouver	Sutton Place	
Corporate Tax – RDTOH, CDA & Other Tax Accounts	Nov 04	9am-12:30pm	Vancouver	Sutton Place	127
Corporate Tax – Review of Tax Planning	Oct 28-29	9am-5pm	Vancouver	Sutton Place	128
	Dec 09-10	9am-5pm	Kelowna	Coast Capri	
	Jan 20-21	9am-5pm	Victoria	Marriott Inner Harbour	
	Mar 12-13	9am-5pm	Vancouver	Sutton Place	
	Available Online				160
Corporate Tax – Scientific Research and Experimental Development (SR&ED): Fundamentals	Nov 07	9am-12:30pm	Vancouver	Sutton Place	128
	Available Online				160
Corporate Tax – Scientific Research and Experimental Development (SR&ED): Advanced	Nov 20	9am-5pm	Vancouver	Four Seasons	129
Corporate Tax – Section 55: How Safe Are Your Dividends?	Nov 04	1:30pm-5pm	Vancouver	Sutton Place	129
	Dec 06	1:30pm-5pm	Kelowna	Ramada Hotel	
Corporate Tax – Shutting Down the Corporation	Nov 05	9am-12:30pm	Vancouver	Sutton Place	130
	Dec 06	9am-12:30pm	Kelowna	Ramada Hotel	
Corporate Tax – Small Business Deduction and Private Corporate Groups	Nov 05	9am-5pm	Vancouver	Four Seasons	130
	Feb 04	9am-5pm	Vancouver	Sutton Place	
Current Issues in Tax Dispute Resolution	Dec 06	9am-12:30pm	Vancouver	Van Convention Centre West	131
GST/HST – CRA Audit	Dec 05	9am-5pm	Vancouver	Van Convention Centre West	131
	Available Online				160
GST/HST – Fundamentals	Nov 05	9am-5pm	Surrey	Sheraton Guildford	132
	Nov 14	9am-5pm	Vancouver	Van Convention Centre West	
	Nov 22	9am-5pm	Victoria	Marriott Inner Harbour	
	Feb 13	9am-5pm	Vancouver	Sutton Place	
GST/HST – NFPOs	Dec 03	9am-5pm	Vancouver	Van Convention Centre West	132
GST/HST – Real Property	Nov 06	9am-5pm	Vancouver	Hyatt Regency	133
	Dec 13	9am-5pm	Vancouver	Four Seasons	
GST/HST - Specific Topics	Nov 25	9am-5pm	Vancouver	Van Convention Centre West	133
	Feb 14	9am-5pm	Vancouver	Sutton Place	
Income Tax – 5 Years of Developments	Nov 13	9am-5pm	Vancouver	Hyatt Regency	134
Income Tax – Assessments, Objections, Voluntary Disclosure and Risk	Nov 27	9am-5pm	Vancouver	Van Convention Centre West	134
Income Tax – Consequences to Avoid	Nov 26	9am-5pm	Vancouver	Van Convention Centre West	135
Income Tax – Employee Benefits	Nov 25	1:30pm-5pm	Vancouver	Van Convention Centre West	135
	Jan 20	1:30pm-5pm	Vancouver	Sutton Place	
Income Tax – Everyday Issues for General Practitioners	Oct 21	9am-5pm	Vancouver	Sutton Place	136
	Oct 23	9am-5pm	Kelowna	Coast Capri	
	Oct 28	9am-5pm	Prince George	Ramada Plaza	
	Nov 04	9am-5pm	Parksville	The Beach Club Resort	
	Nov 15	9am-5pm	Victoria	Victoria Conference Centre	
	Nov 19	9am-5pm	Kamloops	Coast Kamloops	
	Nov 25	9am-5pm	Nanaimo	Best Western Dorchester	
	Nov 25	9am-5pm	Surrey	Sheraton Guildford	
	Jan 17	9am-5pm	Vancouver	Sutton Place	

Income Tax – Income Splitting, a New Era	Oct 11	9am-12:30pm	Coquitlam	Executive Plaza	136
	Oct 18	9am-12:30pm	Vancouver	Sutton Place	
	Oct 22	9am-12:30pm	Victoria	Marriott Inner Harbour	
	Nov 08	9am-12:30pm	Kelowna	Ramada Hotel	
	Nov 12	9am-12:30pm	Surrey	Sheraton Guildford	
	Nov 15	9am-12:30pm	Nanaimo	Vancouver Island Conf Ctr	
	Nov 20	1:30pm-5pm	Kamloops	Coast Kamloops	
	Dec 05	9am-12:30pm	Vancouver	Van Convention Centre West	
Income Tax – Partnerships	Nov 26	9am-5pm	Vancouver	Van Convention Centre West	137
	Feb 11	9am-5pm	Vancouver	Sutton Place	
Income Tax – Principal Residences	Oct 22	9am-12:30pm	Vancouver	Sutton Place	137
	Nov 19	9am-12:30pm	Surrey	Sheraton Guildford	
	Dec 06	1:30pm-5pm	Vancouver	Van Convention Centre West	
Income Tax – Real Estate	Nov 06	9am-5pm	Surrey	Sheraton Guildford	138
	Nov 12	9am-5pm	Vancouver	Hyatt Regency	
Income Tax – Update 2019	Oct 04	9am-5pm	Castlegar	Super 8 Castlegar	138
	Oct 10	9am-5pm	Fort St John	Northern Grand	
	Oct 16	9am-5pm	Vancouver	Hyatt Regency	
	Oct 17	9am-5pm	Terrace	Best Western Terrace Inn	
	Oct 18	9am-5pm	Surrey	Sheraton Guildford	
	Oct 21	9am-5pm	Victoria	Marriott Inner Harbour	
	Oct 24	9am-5pm	Richmond	Executive Airport Plaza	
	Oct 25	9am-5pm	Vancouver	Four Seasons	
	Oct 29	9am-5pm	Prince George	Ramada Plaza	
	Oct 31	9am-5pm	Vancouver	Hyatt Regency	
	Nov 05	9am-5pm	Parksville	The Beach Club Resort	
	Nov 07	9am-5pm	Richmond	Executive Airport Plaza	
	Nov 08	9am-5pm	Coquitlam	Executive Plaza	
	Nov 08	9am-5pm	Vancouver	Hyatt Regency	
	Nov 13	9am-5pm	Victoria	Victoria Conference Centre	
	Nov 14	9am-5pm	Nanaimo	Vancouver Island Conf Ctr	
	Nov 15	9am-5pm	Courtenay	Old House Hotel	
	Nov 15	9am-5pm	Kamloops	Coast Kamloops	
	Nov 18	9am-5pm	Vancouver	Van Convention Centre East	
	Nov 21	9am-5pm	Kelowna	Coast Capri	
	Nov 25	9am-5pm	Vancouver	Van Convention Centre West	
	Nov 26	9am-5pm	Burnaby	Hilton Metrotown	
	Nov 29	9am-5pm	Vancouver	Van Convention Centre West	
	Nov 30	9am-5pm	Vancouver	Van Convention Centre West	
	Dec 03	9am-5pm	Kelowna	Coast Capri	
	Dec 03	9am-5pm	Surrey	Sheraton Guildford	
	Dec 04	9am-5pm	Abbotsford	Quality Hotel	
	Dec 05	9am-5pm	Vancouver	Van Convention Centre West	
	Dec 07	9am-5pm	Vancouver	Van Convention Centre West	
	Dec 11	9am-5pm	Vancouver	Sutton Place	
	Dec 12	9am-5pm	Vancouver	Sutton Place	
	Jan 16	9am-5pm	Vancouver	Hyatt Regency	
	Jan 22	9am-5pm	Victoria	Marriott Inner Harbour	
	Jan 28	9am-5pm	Vancouver	Sutton Place	
	Feb 03	9am-5pm	Vancouver	Hyatt Regency	
NFPO – Taxation	Nov 06	9am-5pm	Vancouver	Hyatt Regency	139
Personal Tax – Compliance & Planning in T1 Preparation	Dec 10	9am-5pm	Coquitlam	Executive Plaza	139
	Jan 16	9am-5pm	Kelowna	Ramada Hotel	
	Jan 27	9am-5pm	Vancouver	Sutton Place	
	Jan 28	9am-5pm	Victoria	Marriott Inner Harbour	

Personal Tax – Review of Tax Planning	Nov 04-05	9am-5pm	Vancouver	Sutton Place	140
	Dec 04-05	9am-5pm	Victoria	Marriott Inner Harbour	
	Jan 21-22	9am-5pm	Surrey	Sheraton Guildford	
	Feb 24-25	9am-5pm	Vancouver	Sutton Place	
	Available Online				160
Probate Fee Avoidance Planning	Nov 20	8am-10am	Vancouver	Four Seasons	140
	Available Online				165
PST – Review of Jurisdictional Sales Tax	Nov 18	9am-5pm	Victoria	Marriott Inner Harbour	141
	Dec 06	9am-5pm	Vancouver	Van Convention Centre West	
RIP – Estate and Testamentary Trust Returns	Nov 26	9am-5pm	Vancouver	Van Convention Centre West	141
RIP – Estate Planning	Nov 05	9am-5pm	Victoria	Marriott Inner Harbour	142
	Nov 19	9am-5pm	Kelowna	Coast Capri	
	Nov 22	9am-5pm	Surrey	Sheraton Guildford	
	Dec 05	9am-5pm	Vancouver	Van Convention Centre West	
RIP – Terminal Filing	Nov 07	9am-5pm	Vancouver	Four Seasons	142
Tax for Controllers	Oct 23-24	9am-5pm	Surrey	Civic Hotel	143
	Nov 19-20	9am-5pm	Vancouver	Hyatt Regency	
Tax Issues in the Sharing Economy	Feb 10	8am-10am	Vancouver	Sutton Place	143
Taxation of Domestic Trusts – Fundamentals	Oct 25	9am-5pm	Vancouver	Sutton Place	144
Taxation of Domestic Trusts – Advanced	Nov 15	9am-5pm	Vancouver	Four Seasons	144
To Be or Not to Be: The Executor - Powers, Obligations and Liabilities	Nov 07	8am-10am	Vancouver	Sutton Place	145
	Available Online				166
US Corporate Tax – Fundamentals	Nov 21	9am-5pm	Vancouver	Four Seasons	145
US Personal Tax – Fundamentals	Dec 02	9am-5pm	Vancouver	Van Convention Centre West	146
US Tax – Personal Investment in Real Estate	Nov 28	9am-5pm	Vancouver	Van Convention Centre West	146
US Tax Reform – Implications for Canadian Businesses	Dec 12	9am-12:30pm	Vancouver	Sutton Place	147

WEALTH MANAGEMENT

Enough Bull: How to Retire Well Without the Stock Market	Oct 30	9am-5pm	Kelowna	Ramada Hotel	148
	Nov 01	9am-5pm	Vancouver	Sutton Place	
Smoke and Mirrors: Financial Myths that will Ruin Your Retirement Dreams	Dec 03	9am-5pm	Vancouver	Van Convention Centre West	149
The Procrastinator's Guide to Retirement	Nov 15	9am-5pm	Coquitlam	Executive Plaza	149
The Simplest Personal Finance Strategy Ever	Oct 31	9am-5pm	Surrey	Sheraton Guildford	150
	Nov 13	9am-5pm	Victoria	Victoria Conference Centre	
	Nov 14	9am-5pm	Abbotsford	Best Western Plus Regency	
	Dec 04	9am-5pm	Vancouver	Van Convention Centre West	

PD NEXUS

PD Nexus: Beyond Financial Reporting	Oct 23	8:30am-4:30pm	Vancouver	Van Convention Centre West	152
PD Nexus: Business Insights Kelowna	Oct 25	8:30am-4:30pm	Kelowna	Coast Capri	152
PD Nexus: Business Insights Vancouver	Dec 06	8:30am-4:30pm	Vancouver	Van Convention Centre West	153
PD Nexus: Maximizing Diversity & Inclusion	Nov 19	8:30am-4:30pm	Vancouver	Van Convention Centre West	154
PD Nexus: Local Government Accounting & Auditing Workshop	Nov 21-22	8:30am-4:30pm	Vancouver	Coast Coal Harbour	153
PD Nexus: Public Practice Insights	Nov 26	8:30am-4:30pm	Vancouver	Van Convention Centre West	154

Abbotsford

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

Best Western Plus Regency — Tel 604 853.3111
32110 Marshall Rd — www.bwregency.bc.ca

Burnaby

Hilton Vancouver Metrotown — Tel 604 438.1200
6083 McKay Ave — www.hilton.com

Holiday Inn Express Vancouver-Metrotown — Tel 604 438.1881
4405 Central Blvd — www.ihg.com

Castlegar

Super 8 Castlegar — Tel 250 365.2700
651 – 18th Street — super8castlegar.com

Coquitlam

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

Courtenay

Old House Hotel — Tel 250 703.0202
1730 Riverside Lane — www.oldhousevillage.com

Fort St. John

Northern Grand Hotel — Tel 250 787.6521
9830 100th Avenue — www.northergrand.com

Kamloops

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

Kelowna

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

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

The Beach Club Resort — Tel 250 248-8999
181 Beachside Drive — www.beachclubbc.com

Prince George

Ramada Plaza 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

Sandman Signature Vancouver Airport — Tel 604 278.9611
10251 St Edwards Drive — www.sandmanhotels.com

Surrey

Civic Hotel — Tel 855 255.8933
13475 Central Avenue — civichotel.ca

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

Terrace

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

Victoria

Comfort Inn & Suites — Tel 250 382.4400
3020 Blanshard Street — www.comfortvictoria.ca

Delta Victoria Ocean Pointe — Tel 250 360.2999
100 Harbour Road — www.marriott.com

Victoria Conference Centre — Tel 250 361.1000
720 Douglas Street — www.victoriaconference.com

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

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

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

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

Whistler

Hilton Whistler Resort — Tel 604 905.3987
4050 Whistler Way — www.marriott.com

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

In-House Presentation Services

Tailored to YOUR needs

We realize that members work in diverse roles and industries, and that seminars tailored and relevant to you are sometimes difficult to locate. CPABC PD In-House Presentation Services can provide you with that customizable solution. We offer seminars is various topics, and our instructors can work with you to customize the seminars so that they focus on your specific needs. Contact us at **pdreg@bccpa.ca** for more information

Flexible	Work around your schedule, your location, and your audience.
Customizable & Confidential	We can discuss your requirements in detail and work with the instructor. You control who attends, so discussions at the seminar can be kept confidential.
Cost Effective	Cost savings vary depending on class size, but you will eliminate travel time and expenses.
Easy	We will draw from an exceptional pool of instructors and find the right ones for you. We will also supply the seminar materials.
Other Benefits	Great for team building, and gain more personalized interaction with the instructor.

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

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

"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

«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

Continuing Professional Development Requirements for CPABC Members

Continuing Professional Development (CPD) is learning that develops and maintains professional competence to enable members to continue to perform their professional roles. Any learning and development that is relevant and appropriate to a member's work and professional responsibilities and growth as a CPA will qualify for CPD. Members need to determine what learning activities qualify for CPD based on his or her own professional needs and circumstances.

Rule 203 of the CPABC Code of Professional Conduct – 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.

In order to comply with Rule 203, a member may need to complete more than the minimum CPD requirement established by Bylaw Regulation.

Minimum CPD Requirements – Part 6 of CPABC Bylaw Regulations

Minimum Requirements	**Verifiable Hours**	**Additional Hours***	**Total Hours**
Annual	10	10	20
Rolling three-calendar-year period, including 4 hours of verifiable professional ethics	60	60	120

** Additional hours can be fulfilled with verifiable and/or unverifiable CPD*

Verifiable CPD

Verifiable CPD refers to learning activities for which there is satisfactory evidence to objectively verify participation. The number of eligible CPD hours for learning activities in this PD brochure is provided in the course description. Members may only report the actual time that was spent developing new or existing competencies in the course.

Verifiable Professional Ethics CPD

Members must complete a minimum of four hours of verifiable professional ethics, as part of the 60 verifiable hours, in each rolling three-calendar-year period. The four 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.

Unverifiable CPD

Includes learning activities relevant to a member's professional role that cannot be verified objectively, such as casual reading of professional journals/magazines.

CPD Reporting

CPD reporting is available on CPABC's Online Services website https://services.bccpa.ca. CPD reports are due by January 31 for the previous calendar year. Members may record their CPD activities online throughout the year as they undertake them. Failure to complete and report CPD requirements on a timely basis will result in a $200 late reporting administrative fee, suspension of membership and/or cancellation of membership.

Newly Admitted Members

Beginning in 2019, all new members are required to report CPD in the year of admission. The CPD reporting year is the calendar year. There is no proration of the CPD requirements in the year of admission. CPD completed anytime in the calendar year will be eligible for CPD credit in the first year of reporting. The first rolling three-calendar-year period begins in the year of admission.

CPD Verification

Members are required to retain documentation supporting their CPD activities for five years after the end of the reporting period. Annually, a sample of CPD reports is verified for the preceding three-calendar-year period. There is no need to submit the supporting records unless requested.

Additional Information

For further information, please refer to our website at **www.bccpa.ca**, or contact Lisa Murray, CPD Administrator at 604 488.2614 or cpd@bccpa.ca

Accounting & Assurance

Audit & Assurance

Financial Reporting

Management Accounting & Financial Management

SEMINAR MATERIAL — PAPERLESS | OPTIONAL — LAPTOP | AVAILABLE OPTION — ONLINE

Assurance – Compliance with Agreements, Statutes and Regulations

LEVEL Intermediate

Prerequisite
Familiarity with *CPA Handbook – Assurance*.

Overview
Are you required to audit or review a client's compliance with agreements, laws, regulations etc.? Effective for compliance reports dated on or after April 1, 2019 there are new assurance requirements: *CSAE 3530 Special Considerations – Attestation Engagements to Report on Compliance* and *CSAE 3531 Special Considerations – Direct Engagements to Report on Compliance* which will impact what you do and how you report.

Course Description
This course will cover the new requirements for engagements to audit or review compliance of financial or non-financial information with agreements, statutes, laws or regulations. Reports that will be impacted by the new CSAE 3530 and 3531 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

Applicable for
Practitioners conducting attestation or direct engagements to audit or review compliance of financial or non-financial information with agreements, statutes, laws or regulations.

Content
- overview and scope of CSAE 3530 and 3531
- CSAE 3530 and 3531 performance requirements
- CSAE 3530 and 3531 reporting requirements, including illustrative examples

Seminar Material Format
Paperless materials free of charge. Print option available for $20.

Seminar Leaders
Diane McDonald, CPA, CA

Fee $225 | **PD Passport Valid – 1/2 Passport Day** | **3.5 Eligible CPD Hours**

Advisory: There will be video recording at the Nov 6 session.

SEMINAR MATERIAL — PAPERLESS | OPTIONAL — LAPTOP | AVAILABLE OPTION — ONLINE

Assurance – Update 2019

LEVEL Intermediate

Prerequisite
Participants should be familiar with the *CPA Handbook – Assurance*.

Overview
This seminar is designed to review recent revisions to the *CPA Canada Handbook–Assurance* and other practice matters in the last year. The seminar focuses on new and revised assurance and other related service standards issued, with an overview of projects in progress, and other issues and developments of interest to practitioners, including issues identified on a national basis by practice advisory and/or practice inspection.

Course Description
This half day seminar addresses changes to both audit standards and non-audit assurance standards. Coverage of audit topics includes revisions to Canadian audit standards including auditing accounting estimates and the applicability of communicating key audit matters in the audit report, upcoming changes to the assessment of risks of material misstatement and quality control and other developments of interest to auditors. Coverage of non-audit assurance standards addresses practice issues under CSRE 2400, the proposed new Canadian Standard on Related Services (CSRS) 4200 Compilation Engagements and current practice issues for compilation engagements.

Applicable for
Practitioners providing public accounting, assurance and other related services, serving small and medium-sized entities that are private or not-for- profit entities.

Content
Audit topics

- introduction and overview of revised standards issued applicable to audits
- specific coverage of auditing accounting estimates
- 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

Non-Audit Assurance topics

- practice inspection deficiencies and remedies applicable to CSRE 2400
- proposed CSRS 4200 Compilation Engagements
- practice matters, including practice inspection findings and practice advisory comments on current compilations

Seminar Material Format
Paperless materials free of charge. Print option available for $20.

Seminar Leaders to be drawn from
Tom Gillespie, CPA, CA
Kent Greaves, CPA, CA
Diane McDonald, CPA, CA
Bridget Noonan, CPA, CA

Fee $225 | **PD Passport Valid – 1/2 Passport Day** | **3.5 Eligible CPD Hours**

For dates, times and venues – see page 22

SEMINAR MATERIAL PAPERLESS · OPTIONAL LAPTOP

Assurance - Update 2019 - Just Audits

LEVEL Intermediate

Prerequisite

Participants should be familiar with the *CPA Handbook – Assurance*.

Overview

With increasing specialization in our profession, some practitioners deal exclusively with audits and others do not perform any audit engagements. To address this specialization, this seminar will focus on *Just Audits*.

Course Description

This seminar is designed to review recent revisions to the *CPA Canada Handbook– Assurance* and other practice matters in the last year. The focus is on new and revised assurance standards issued, and provides an overview of projects in progress and other issues and developments of interest to practitioners, including issues identified by practice advisory and/or practice inspection.

This modular approach to the *Assurance - Update 2019* course allows participants to pick and choose their topics of interest and attend sessions that reflect their practice, but also allows them to be aware of all of the changes in assurance by attending both sessions or a combined session.

Assurance - Update 2019 - Just Audits will address recent revisions to Canadian audit standards, upcoming changes to the assessment of risks of material misstatement and quality control and other developments of interest to auditors. Also available is the modular session *Assurance - Update 2019 - Other Than Audits* which covers non-audit assurance standards updates and projects.

Applicable for

Practitioners providing public accounting, and audit assurance services, serving small and medium-sized entities. Practitioners who do not do audits or who also perform non audit assurance engagements should consider attending the two-hour seminar *Assurance - Update 2019 – Other than Audits*.

Content

- introduction and overview of revised standards issued applicable to audits
- specific coverage of auditing accounting estimates
- applicability of communicating key audit matters in the 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 Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leader

Diane McDonald, CPA, CA

Fee $130 **PD Passport Valid – 1/3 Passport Day** **2 Eligible CPD Hours**

SEMINAR MATERIAL PAPERLESS · OPTIONAL LAPTOP

Assurance - Update 2019 – Other Than Audits

LEVEL Intermediate

Prerequisite

Participants should be familiar with the *CPA Handbook – Assurance*.

Overview

With increasing specialization in our profession, some practitioners deal exclusively with audits and others do not perform any audit engagements. To address this specialization, this seminar will focus only on assurance areas *Other than Audits*.

Course Description

This seminar is designed to review recent revisions to the *CPA Canada Handbook– Assurance* and other practice matters in the last year. The focus is on new and revised non-audit assurance and other related service standards issued, and provides an overview of projects in progress and other issues and developments of interest to practitioners, including issues identified by practice advisory and/or practice inspection.

This modular approach to the Assurance Update course allows participants to pick and choose their topics of interest and attend sessions that reflect their practice, but also allows them to be aware of all of the changes in assurance by attending both sessions or a combined session.

Assurance - Update 2019 - Other Than Audits will address practice issues under CSRE 2400, the proposed new Canadian Standard on Related Services (CSRS) 4200 Compilation Engagements and current practice issues for compilation engagements. Also available is *Assurance - Update 2019 - Just Audits*, which will address recent revisions to Canadian audit standards. Practitioners who perform both Audit and non-audit assurance engagements will benefit from taking both courses, or the combined half day seminar if available.

Applicable for

Practitioners providing public accounting, and non-audit assurance and other related services, serving small and medium-sized entities. Practitioners who also do audits should consider attending the two-hour seminar *Assurance - Update 2019 – Just Audits*.

Content

- practice inspection deficiencies and remedies applicable to CSRE 2400
- proposed CSRS 4200 Compilation Engagements
- practice matters, including practice inspection findings and practice advisory comments on current compilations

Seminar Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leader

Diane McDonald, CPA, CA

Fee $130 **PD Passport Valid – 1/3 Passport Day** **2 Eligible CPD Hours**

SEMINAR MATERIAL PAPERLESS | OPTIONAL LAPTOP

Audit Engagements – Application of the Standards Using PEG

LEVEL Intermediate

Prerequisite

Participants should be familiar with the *CPA Handbook – Assurance* and have some experience performing audits.

Overview

This seminar provides practical guidance on how to perform effective and efficient small to medium sized audit engagements, including not for profit entities. Using audit methodology contained in Volume 2 of PEG, this course 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.

Course Description

This course will take participants through each of the steps involved in performing a small audit. This includes client acceptance, understanding the entity, materiality, planning, how to identify and respond to risks, customizing work programs, testing, monitoring work as it progresses, documenting working papers and communicating findings internally and then to the client on a timely basis.

Applicable for

Practitioners and professional staff who perform audit engagements and would like a refresher on how to perform an audit efficiently and effectively using PEG.

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 Hours

This seminar contains 0.5 hours of ethics content.

Seminar Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leader to be drawn from

Greg Buck, CPA, CA, BComm
Bridget Noonan, CPA, CA

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

SEMINAR MATERIAL PAPERLESS | OPTIONAL LAPTOP

Audit Engagements – Audit of a Simple Entity

LEVEL Intermediate

Prerequisite

Participants should be aware of the CAS standards as not all CAS standards are reviewed during the course (for this type of course please refer to the Survey of Audit Standards course). Standards used in the course for case purposes are chosen to demonstrate how to meet the standard given a simple client and limited budget. Since the course discusses limiting the use of audit worksheets (i.e. CPEG), participants should have professional judgement to determine what work should be completed to meet the minimum CAS standards.

Overview

The course will look at the challenges of applying and achieving the Canada Audit Standards (CAS) in situations when the auditor is engaged with a small, simple entity. Participants will have an opportunity to raise issues and challenges that auditors face when auditing a small entity with limited resources and workshop several potential efficiencies to help them achieve their goals.

Course Description

This course will look at some of the misconceptions on what people consider a simple or a small audit. Once having identified what a simple or small audit should be, participants will look at ways to use different documentation techniques, risk identification and efficiencies to make the most of their limited budget. Participants will use exercises and a case study to practice and brainstorm new ideas on ways to address the requirements of CAS. This will emphasize the new perspectives and insights on the problems participants have experienced in their practical experience.

Applicable for

Intermediate to advanced level auditors who are seeking additional knowledge and tactics on how standards can be met given limited budgets and time on smaller, simpler audit clients.

Content

- revisiting the audit process – meeting the audit process described in CAS given the shorter time horizon and budget that exists in a simpler client
- documentation of knowledge of client and how to make the most of this information
- risk assessment for smaller entities
- determining the appropriate risk responses
- customizing risk assessment response scaled to the appropriate size and risk for a small entity
- utilizing technology to document and audit more efficiently

Seminar Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leader to be drawn from

Robin Diehl, CPA, CA, CBV
Bridget Noonan, CPA, CA

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

For dates, times and venues – see page 22

SEMINAR MATERIAL PAPERLESS · OPTIONAL LAPTOP

Audit Engagements – CAS 240: Risk Related to Fraud

LEVEL Introductory

Prerequisite

None.

Overview

An auditor has responsibilities relating to fraud in the context of an audit. The requirements of 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.

Course Description

Misstatements in the financial statements can arise from fraud or error. The distinguishing factor between fraud and error is whether the underlying action that results in the misstatement is intentional or unintentional. 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. Participants will identify the auditor's responsibilities related to fraud and apply the standards when designing and performing procedures for audit engagements.

Applicable for

Practitioners in public practice who want to improve their ability to identify and assess the risk of fraud and who want to strengthen the work performed and documented in the assurance files in order to help them meet their responsibilities related to fraud in an efficient and effective manner.

Content

- overview of CAS 240 and its related requirements
- review of key characteristics of fraud
- performing required 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 including developing additional procedures, if required and the audit report
- assess the impact on the audit report
- overview implement of documentation and communication requirements into the engagement files

Ethics Hours

This seminar contains 0.5 hours of ethics content.

Seminar Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leader

Robin Diehl, CPA, CA, CBV

Fee $225 | **PD Passport Valid- 1/2 Passport Day** | **3.5 Eligible CPD Hours**

SEMINAR MATERIAL PAPERLESS · OPTIONAL LAPTOP · AVAILABLE OPTION ONLINE

Audit Engagements – Review of the Standards

LEVEL Introductory to Intermediate

Prerequisite

Participants should have some familiarity with the *CPA Handbook – Assurance*.

Overview

Developed with the needs of professional accountants working in public practice in mind, this seminar provides a solid foundation in the practical application of the Canadian Auditing Standards (CAS) to audit engagements. The course reviews key CAS requirements with an emphasis on areas identified as common pitfalls by CPA national practice inspection findings. Participants will also explore the key elements of documenting an engagement working paper file including, planning, engagement execution, and reporting.

Course Description

Using a case study approach, participants will develop a deeper understanding of how to apply the Canadian Auditing Standards to a set of client-specific facts. Participants will explore documentation alternatives, and learn practical tools and techniques for planning, performing, concluding and documenting their audit engagements in an effective and efficient manner.

Applicable for

Audit practitioners at all levels of experience, who want to refresh their understanding of the CAS in order to apply the standards more effectively and efficiently.

Content

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

Ethics Hours

This seminar contains 0.75 hours of ethics content.

Seminar Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leader

Robin Diehl, CPA, CA, CBV

Fee $785 | **PD Passport Valid - 2 Passport Days** | **14 Eligible CPD Hours**

SEMINAR MATERIAL PAPERLESS | OPTIONAL LAPTOP

Compilation Engagements – Review of Section 9200

LEVEL Intermediate

Prerequisite

Participants should be familiar with the *CPA Handbook – Assurance* sections 9200 and AuG-5, and with preparing compilation engagements. Participants would also benefit from reading the AASB's exposure draft on *CSRS 4200: 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.

Course Description

This course provides scenario-based exercises that will assist participants in developing their understanding of the existing 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 seminar also provides a forum for practitioners to discuss the challenges they have experienced and to share solutions and best practice approaches with each other. Lastly, the seminar looks to the proposed *CSRS 4200: Compilation Engagements* and the key differences between the proposals and the current standards.

Applicable for

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
- engagement acceptance, independence
- engagement letters and other client correspondence, and the Notice to Reader report
- file documentation, tools & resources, and retention of working paper files
- overview of the proposed CSRS 4200: Compilation Engagements standard
- sample compilation file

Ethics Hours

This seminar contains 0.5 hours of ethics content.

Seminar Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leader to be drawn from

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

Fee $225 | **PD Passport Valid – 1/2 Passport Day** | **3.5 Eligible CPD Hours**

SEMINAR MATERIAL PAPERLESS | OPTIONAL LAPTOP

Fraud Happens – What to do When You Suspect Fraud

LEVEL Intermediate

Prerequisite

None.

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.

Course Description

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.

Applicable for

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

Content Note

There is some limited overlap between this seminar and *Fraud Risk Management*, 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.

Seminar Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leader

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

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

For dates, times and venues – see page 22

SEMINAR MATERIAL PAPERLESS | OPTIONAL LAPTOP

Quality Control – Application of CSQC1

LEVEL Intermediate

Prerequisite

Participants should have 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*).

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.

Course Description

This seminar has been created to provide sole practitioners and small firms with the opportunity to complete annual monitoring and will not address any requirements when services are provided to publicly accountable entities. During the seminar, practitioners will review the firm's quality control documentation as well as completed engagement files.

Applicable for

Sole practitioners and partners of small firms who are responsible to complete the firm's annual quality control monitoring, as well as senior staff who assist the quality control partner in meeting the annual monitoring requirements.

Content

- annual monitoring
- quality control manual – annual update of firm's policies and procedures assurance manual
- monitoring of firm specific requirements
- monitoring of engagement specific requirements
- findings and action plan

Special Note

Participants must have access to the following material in class, either in hardcopy or on a laptop (electronic copies preferred)

- 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

Seminar Material Format

Paperless materials only.

Seminar Leader

Bridget Noonan, CPA, CA

Fee $225 | **PD Passport Valid – 1/2 Passport Day** | **3.5 Eligible CPD Hours**

NOTABLE FORMAT ONLINE

Quality Control – Review of CSQC1

LEVEL Intermediate

Prerequisite

Participants should be familiar with CSQC1.

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 seminar 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.

Course Description

This course is structured, based on the CPA Canada Quality Assurance Manual (QAM) subscription, however the topics and ideas may be integrated into any customized firm template. CPA Canada's QAM sample and related resources are used as a starting point for the firm's quality control documentation.

Note that requirements specific to firms providing services to publicly accountable entities will not be covered. Although there have been few changes in the quality control standards for a number of years this session is offered annually to assist practitioners in meeting the requirements.

Applicable for

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

- overview of standards
- ethical considerations, acceptance and continuance
- human resources
- engagement performance
- monitoring
- common deficiencies and wrap up

Availability

Online only

Fee $225 | **PD Passport Valid – 1/2 Passport Day** | **3.5 Eligible CPD Hours**

SEMINAR MATERIAL: PAPERLESS | OPTIONAL: LAPTOP | AVAILABLE OPTION: ONLINE

Review Engagements – Application of the Standard

LEVEL Intermediate

Prerequisite

It is recommended to have a good knowledge of the standard CSRE 2400.

Overview

The standard on review engagements CSRE 2400 is now effective for reviews of financial statements and financial information for periods ending on or after December 14, 2017. This training activity is essential to experienced practitioners who have already taken note of the requirements of the new standard CSRE 2400.

Course Description

Using extracts of a review engagement file for a fictitious entity, this activity, which is aimed at an experienced clientele, allows the participant to deepen their knowledge of the requirements and to benefit from practical advice in order to properly apply them.

Applicable for

Professional accountants in public practice who will be issuing reports under the new review engagement standard, CSRE 2400.

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 engagement
  - work required (responsibilities)
  - specific topics

Seminar Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leader

Tom Gillespie, CPA, CA

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

TITLE STATUS: EXPANDED | SEMINAR MATERIAL: PAPERLESS | OPTIONAL: LAPTOP

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. An online version of *Review Engagements: Overview of CSRE 2400* is available if you require fundamental knowledge of the standard to meet the prerequisites.

Overview

This seminar will identify and discuss in detail the common application issues for review engagements under the new CSRE 2400 standard.

Course Description

The course 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.

Applicable for

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 Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leader to be drawn from

Greg Buck, CPA, CA, BComm
Tom Gillespie, CPA, CA

Fee $450 | **PD Passport Valid – 1 Passport Day** | **7 Eligible CPD Hours**

For dates, times and venues – see page 22

TITLE STATUS: NEW | SEMINAR MATERIAL: PAPERLESS | OPTIONAL: LAPTOP

ASNFPO – Update 2019

LEVEL Intermediate

Prerequisite

Participants should be familiar with ASNFPO.

Overview

This seminar will review recent and proposed revisions to Part III - Accounting Standards for Not-for-Profit Organizations (ASNFPO).

Course Description

This seminar will provide an information update on recent revisions to the *CPA Canada Handbook –Part III*, Accounting Standards for Not-for-Profit Organizations (ASNFPO).

Participants will first be provided with an overview of changes to ASNFPO, followed by discussion of major projects and impact on NFPOs. In addition, practical guidance will be provided on selected accounting matters identified by practice advisory and/or practice inspection. In addition, information will be provided on performance measures and matters of importance to Board members.

Participants will be able to utilize this information on proposed changes to the standards to provide guidance to NFPOs and board members.

The seminar is best suited to professionals who are involved in the preparation and analysis of financial statements using ASNFPO, practitioners who provide assurance on these financial statements and CPAs who volunteer on Boards for NFPOs.

Applicable for

Professionals who are involved in the preparation and analysis of financial statements for NFPO's and practitioners who provide assurance on these financial statements using ASNFPO.

Content

- accounting standard improvements to ASNFPO's
- projects - contributions revenue recognition and related matters
- matters NFPO committee
- practice inspection topics
- financial and non-financial performance measures
- matters of importance to board members

Seminar Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leader to be drawn from

Kent Greaves, CPA, CA
Terry Gunderson, CPA, CA
Diane McDonald, CPA, CA
Bridget Noonan, CPA, CA

Fee $225 | **PD Passport Valid - 1/2 Passport Day** | **3.5 Eligible CPD Hours**

SEMINAR MATERIAL: PAPERLESS | OPTIONAL: LAPTOP

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.

Course Description

Participants will learn about the major differences between Accounting Standards for Private Enterprises (ASPE) and publicly accountable enterprises using International Financial Reporting Standards (IFRS) with an eye toward giving participants the ability to identify the major similarities and significant differences between the two sets of standards and how these differences impact financial statements. You will also learn about the impact of current developments and changes to standards in IFRS and how they will impact ASPE, and the one-time considerations on transitioning between the two sets of standards. This will allow you determine the appropriate standard for an entity and to explain the differences to interested parties e.g. Board members.

Applicable for

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 (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 Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leader

Diane McDonald, CPA, CA

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

TITLE STATUS: NEW | SEMINAR MATERIAL: PAPERLESS | OPTIONAL: LAPTOP

ASPE – Construction Industry

LEVEL Intermediate

Prerequisite

Familiarity with *CPA Handbook – Accounting Part II ASPE*, and knowledge of the construction industry business practices.

Overview

This seminar explores the Part II – Accounting Standard for Private Enterprises (ASPE) that are applicable to the construction industry in a practical manner. For the purposes of this seminar, construction industry includes construction contractors with various activities. A contractor may engage in those activities as a general contractor or subcontractor, and does not necessarily have the ownership of real estate, but is acting as a vendor to the builders, developers and landlords that have direct or indirect ownership of the real estate. The seminar will also cover the disclosure requirements and other issues specific to construction contracts.

Course Description

As the construction industry continues to become a larger part of the Canadian economy, a similar increase in the level of complexity of industry practices has been observed. This leaves practitioners with the challenge of applying the standard in this ever-changing landscape. This half-day course is designed to enable the practical application of the ASPE standard to construction entities. Emphasis will be placed on the application of revenue recognition and other accounting policies using specific scenarios and practical illustrative examples.

Applicable for

Controllers, Directors of Finance or CFOs in construction entities; professional accountants in public practice; and professionals seeking knowledge of construction accounting.

Content

- common business practices in the construction industry
- revenue recognition under the percentage of completion method
- revenue recognition under the completed contract method
- unbilled receivable and deferred revenue
- holdbacks receivable and payable
- other financial reporting implications
  - change orders
  - claims
  - incentives and penalties
  - impairment

Seminar Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leader

Tom Gillespie, CPA, CA

Fee $225 | **PD Passport Valid – 1/2 Passport Day** | **3.5 Eligible CPD Hours**

SEMINAR MATERIAL: PAPERLESS | OPTIONAL: LAPTOP

ASPE – Disclosure and Presentation

LEVEL Intermediate

Prerequisite

The seminar does not address recognition and measurement; therefore, a good working knowledge of the recognition and measurement standards would be beneficial.

Overview

This seminar reviews the reality and best practices for disclosure and presentation requirements of Part II – Accounting Standards for Private Enterprises (ASPE). 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).

Course Description

Much was said about reduced disclosure for private enterprises when ASPE was issued, but what is the reality and what are best practices now? The objective of this seminar is to provide participants with knowledge and understanding of the financial statement disclosure and presentation requirements for ASPE.

This full-day seminar reviews disclosure and presentation requirements of ASPE, from cash to cash flow; from financial instruments to equity instruments; and from the known to the contingent, using examples of all ASPE disclosure and presentation requirements. The seminar will be delivered primarily through discussion of examples with some exercises.

Applicable for

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

Content

- disclosure requirements provided in Part II of the *CPA Canada Handbook – Accounting*
- applying professional judgment in developing sufficient disclosure
- identifying options and choices in presentation
- presentation and disclosure requirements in Sections 1000 through Section 3870 and the Guidelines in Part II of the *CPA Canada Handbook – Accounting*

Seminar Material Format

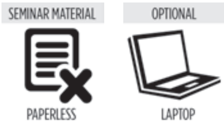
Paperless materials free of charge. Print option available for $20.

Seminar Leader to be drawn from

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

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

For dates, times and venues – see pages 23 to 24



ASPE – Real Estate Industry

LEVEL Intermediate

Prerequisite

Participants should be familiar with the *CPA Handbook – Assurance, Part II Accounting Standards for Private Enterprises* (ASPE).

Overview

Real estate entities have unique financial reporting issues under Accounting Standards for Private Enterprise (ASPE). This course will use exercises and examples to illustrate these issues to provide practical advice for those involved.

Course Description

This seminar reviews the Accounting Standards for Private Enterprise (ASPE) applicable to the real estate industry – both developers and those with income producing properties, using industry guidance available from the Real Property Association of Canada (REALpac). Participants will discuss the unique accounting issues encountered by builders, developers and landlords who have direct or indirect ownership in real estate.

Applicable for

Professionals involved in the preparation of private enterprise financial statements for real estate companies and practitioners who serve private clients 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
- accounting for holdbacks
- revenue recognition on sale of real estate
- revenue recognition from rental properties
- impairment of real estate properties
- contract modifications and claims
- determining cost of sales for properties sold

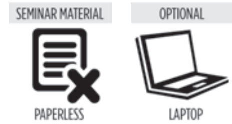
Seminar Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leader

Diane McDonald, CPA, CA

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**



ASPE – Related Party Transactions

LEVEL Intermediate

Prerequisite

Participants should be familiar with the *CPA Handbook – Assurance, Part II Accounting Standards for Private Enterprises* (ASPE).

Overview

This one day course is designed to address the challenges faced by preparers of ASPE financial statements and practitioners with respect to the recognition, measurement, presentation and disclosure of related party transactions and balances under ASPE.

Course Description

Accounting for related party transactions is one of the most complicated areas of applying accounting standards for private enterprises (ASPE) and it is an area of accounting regularly cited for deficiencies by practice inspection. Now there are new developments with changes to ASPE 3856 accounting for retractable and mandatorily redeemable shares and accounting for financial instruments in related party transactions.

Applicable for

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

Content

- what is a related party transaction and who are related parties?
- how should related party transactions be measured – at cost, exchange amount or fair value?
- when and how does Section 3856, Financial Instruments apply to related party transactions?
- should related party financial instruments be classified as current or non-current?
- how to assess collectability of related party receivables?
- should gains and losses on related party transactions recorded in profit and loss or as a capital transaction?
- 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

Seminar Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leader

Diane McDonald, CPA, CA

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

SEMINAR MATERIAL PAPERLESS · OPTIONAL LAPTOP · AVAILABLE OPTION ONLINE

ASPE – Review of the Standards

LEVEL Introductory

Prerequisite

Participants should be familiar with the *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, this seminar will identify and outline the accounting policy choices available to management in applying ASPE.

Course Description

In addition to the review of all ASPE sections and guidelines, examples and exercises will cover some of the newer or more common concepts of accounting used by private enterprises, including areas where practice review has identified struggles or challenges. A high level overview addressing ASPE application for not-for-profit organizations will also be included.

Applicable for

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 Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leader

Diane McDonald, CPA, CA

Fee $785 **PD Passport Valid - 2 Passport Days** **14 Eligible CPD Hours**

SEMINAR MATERIAL PAPERLESS · OPTIONAL LAPTOP · AVAILABLE OPTION ONLINE

ASPE – Strategic Investments

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. The options and their impacts will be explored in this course.

Course Description

This course covers ASPE 1591, 3051 and 3856 and examines the choices to be made regarding accounting for strategic investments, including subsidiaries, significantly influenced investees or investments in joint arrangements. This examination will include the impact on recognition, measurement, presentation and disclosure of the choices. In addition, the course explores the recent changes to ASPE when you choose to account for controlled subsidiaries or significantly influenced investees at cost.

Applicable for

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 Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leader

Diane McDonald, CPA, CA

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

Advisory: There will be video recording at the Nov 15 session.

For dates, times and venues – see pages 23 to 24

TITLE STATUS: NEW | SEMINAR MATERIAL: PAPERLESS | OPTIONAL: LAPTOP | AVAILABLE OPTION: ONLINE

ASPE – Update 2019

LEVEL Intermediate

Prerequisite

Participants should be familiar with ASPE.

Overview

This seminar will review recent revisions to Part II - Accounting Standards for Private Enterprises (ASPE). Participants will first be provided with an overview of changes to ASPE, 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.

Course Description

The seminar is best suited to 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, who want to ensure they are aware of recent changes in ASPE standards, and hot topic areas to improve their knowledge. It will also assist these professionals to be aware of projects that are being worked on, as well as areas that standard setters are discussing to be aware of potential future changes in the standard.

Applicable for

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

- new handbook sections
  - retractable or mandatorily redeemable shares issued in a tax planning arrangement
  - accounting for related party financial instruments and significant risk disclosures
  - narrow scope amendment financial instruments
  - income taxes
  - investments
- agriculture exposure draft
- consultation on priorities for ASPE
  - revenue - specific items
- matters discussed by the Private Enterprise Advisory Committee
- practice inspection topics and other "hot topics"

Seminar Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leader to be drawn from

Tom Gillespie, CPA, CA
Kent Greaves, CPA, CA
Terry Gunderson, CPA, CA
Diane McDonald, CPA, CA

Fee $225 | **PD Passport Valid – 1/2 Passport Day** | **3.5 Eligible CPD Hours**

SEMINAR MATERIAL: PAPERLESS | OPTIONAL: LAPTOP

IFRS – Disclosure and Presentation

LEVEL Intermediate

Prerequisite

Participants should be familiar with the *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 disclosures 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 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.

Course Description

This course is offered to provide participants with an up-to-date review of the disclosure and financial statement presentation standards. In addition, areas to watch out for are highlighted based on reviews by users and regulatory bodies. Up to date sample notes and financial statements are also provided to assist with enhancing participants' knowledge in this area.

Applicable for

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

Seminar Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leader

Erin Rao, CPA, CA

Fee $785 | **PD Passport Valid - 2 Passport Days** | **14 Eligible CPD Hours**

SEMINAR MATERIAL: PAPERLESS | OPTIONAL: LAPTOP | AVAILABLE OPTION: ONLINE

IFRS – Review of the Standards

LEVEL Introductory

Prerequisite

Familiarity with *CPA Handbook – Accounting Part I* is useful but not required.

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.

Course Description

This seminar will cover all of the International Financial Reporting Standards (IFRS) incorporated as part of *CPA Canada Handbook – Accounting – Part I*. The focus is on the IFRS standards that apply to most profit-oriented entities. Participants will also be provided with information on IFRS standards currently under development and the potential impact on financial statements. At the end of this two-day seminar you will be aware of the foundation of IFRS and be able to explain IFRS content. Examples and exercises are incorporated throughout the session for you to identify application issues.

Applicable for

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
- first-time adoption considerations
- examples and exercises to illustrate application issues

Seminar Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leader

Diane McDonald, CPA, CA

Fee $785 | **PD Passport Valid - 2 Passport Days** | **14 Eligible CPD Hours**

SEMINAR MATERIAL: PAPERLESS | OPTIONAL: LAPTOP | AVAILABLE OPTION: ONLINE

IFRS – Update 2019

LEVEL Intermediate

Prerequisite

Participants should have an understanding of the current standards in the *CPA Canada 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 2018 to June 2019. The topics addressed by the IFRS Discussion Group during the year will be identified with more in-depth coverage of specific items. Topics addressed where the IFRS Interpretations Committee determined improvements or clarifications were not considered necessary will be identified so participants can obtain a better understanding of the standards, including the impact of this information on judgments being made. Recent publications by the regulators are referenced so that participants are aware of and consider the implications of regulator communications.

Course Description

This course updates the participants' knowledge of changes to IFRS and non-authoritative guidance that has been issued by the IFRS Interpretations Committee and the IFRS Discussion Group during the year. Minimal changes to IFRS are expected in the current year. Awareness of these changes and knowledge of topics discussed with respect to the application of IFRS are essential to those applying IFRS. Examples, as included in the discussions, will be used to demonstrate the topics. Notices issued by the regulators will be referenced.

Applicable for

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 – focus will be on maintenance projects as no significant changes to the standards are anticipated
- commentary on standards
  - IFRS Interpretations Committee Agenda Decisions
  - IFRS Discussion Group notes
  - regulator communications
  - other relevant publications
- projects in process

Seminar Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leader

Diane McDonald, CPA, CA

Fee $225 | **PD Passport Valid - 1/2 Passport Day** | **3.5 Eligible CPD Hours**

For dates, times and venues – see pages 23 to 24

SEMINAR MATERIAL PAPERLESS · OPTIONAL LAPTOP · AVAILABLE OPTION ONLINE

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 IASB standard IFRS 9, Financial Instruments, which recently became effective for fiscal years starting after January 1, 2018. This standard is significantly different in many areas compared its predecessor standard, IAS 39, and certain models and provisions in the new standard may be difficult to apply and require significant judgments.

Course Description

This course will assist participants by providing them with the practical knowledge to understand the concepts and provisions to the standard and apply it to their portfolio of financial instruments. This new standard applies to all companies and may require certain planning, system and process changes to apply it effectively. This standard can significantly change financial instrument classification, measurement and impairment amounts and their timing of recognition. This course will likely be particularly relevant to certain industries as well (e.g. banking and other financial service industries).

Applicable for

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
- future developments
- derivatives and embedded derivatives
- hedging

Seminar Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leader

Diane McDonald, CPA, CA

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

SEMINAR MATERIAL PAPERLESS · OPTIONAL LAPTOP

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 a practical understanding of the new five-step revenue recognition framework under Part I – International Financial Reporting Standards (IFRS) 15, Revenue from Contracts with Customers, and how to apply it. The seminar will address disclosure requirements, transitional requirements, key judgments and provide examples applying the standard.

Course Description

This course will provide participants with a practical 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 and presentation requirements, application guidance on various topics, transitional requirements, and key judgments in applying the standard.

Applicable for

Professionals who are responsible for revenue recognition oversight and the accounting and/or auditing 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
- practical challenges and considerations and current developments
- 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.

Seminar Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leader

Diane McDonald, CPA, CA

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

SEMINAR MATERIAL – PAPERLESS | OPTIONAL – LAPTOP | AVAILABLE OPTION – ONLINE

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.

Course Description

This seminar provides participants with an in-depth review of the new lease standard. The entire standard will be covered from the perspectives of both the lessee and lessor; however, more emphasis is on the areas of change which focus on lessee accounting.

Participants will have the opportunity to review a number of illustrative examples and exercises. In addition, to help address transitional issues the topics related to leases from the IFRS Discussion group are reviewed. After attending this seminar, participants will have reviewed the objective and scope of the standard, defined terms, exemptions, its effective date and transitional requirements.

Applicable for

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

- identifying a lease
  - separate components of a contract lessee and lessor
- lessee coverage includes:
  - recognition
  - measurement – initial and subsequent
  - presentation and disclosure
- lessor coverage includes:
  - classification and disclosure of leases as finance or operating leases
  - subleases
- sale and leaseback transactions
- transitional requirements
- impact of IFRS 16 on financial statements and ratios
- current developments

Seminar Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leader to be drawn from

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

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

SEMINAR MATERIAL – PAPERLESS | OPTIONAL – LAPTOP

NFPO – Disclosure and Presentation

LEVEL Intermediate

Prerequisite

Participants should have an 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.

Course Description

This course will serve as a comprehensive review of the presentation and disclosure requirements faced by a not-for-profit organization when it applies ASNFPO and relevant ASPE standards. Participants will review a variety of examples and learn to apply the disclosure requirements for a number of different areas that NFPOs regularly deal with. Different presentation methods (restricted fund vs. deferral method) and the impact on presentation will also be discussed

Applicable for

Professionals at all levels involved in the preparation and review of NFPO financial statements. 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 Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leader

Robin Diehl, CPA, CA, CBV

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

For dates, times and venues – see pages 23 to 24

SEMINAR MATERIAL — PAPERLESS | OPTIONAL — LAPTOP | AVAILABLE OPTION — ONLINE

NFPO – Review of the Standards

LEVEL Intermediate

Prerequisite

Participants should be familiar with the *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 seminar 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).

Course Description

This course will serve as a review and refresher of the application of ASNFPO and as well as the most common ASPE standard applicable to not-for-profit organizations. Participants will learn what choices are available when setting policies, the impacts on disclosure, and participate in activities and exercises to strengthen the knowledge gained throughout this course.

Applicable for

Professionals at all levels involved in the preparation and review of NFPO financial statements. 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 – including changes upcoming for fiscal year ends beginning on or after January 1, 2019
- reporting controlled and related entities
- allocated expenses
- ongoing projects and potential impact of changes

Seminar Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leader to be drawn from

Robin Diehl, CPA, CA, CBV
Terry Gunderson, CPA, CA

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

SEMINAR MATERIAL — PAPERLESS | OPTIONAL — LAPTOP

PSAS – Review of the Standards

LEVEL Introductory

Prerequisite

Working knowledge of ASPE and/or IFRS.

Overview

This course is a focus on general PSAS concepts, the structure of the *PSA Handbook*, and how and why PSAS standards differ from ASPE and IFRS. The course is lecture style but presented in modules that group relevant concepts together and allow for time for interactive questions and discussions. Examples and small case studies are used to keep attendees engaged.

Course Description

The course is presented in modules that group relevant concepts together. The key concepts in PSAS are compared to those in ASPE or IFRS so that the participant can compare and contrast to those standards that they may have some familiarity with. All modules are structured with enough time for interactive questions and discussion. Most modules will contain a few group questions or mini-case studies to allow for some hands-on learning. Participants will come away with good knowledge of general PSAS concepts and an understanding of where to look into the *PSA Handbook* to research complexities of real-life situations.

Applicable for

Accountants new to roles (or considering roles) at local/provincial or federal governments, or their related crown corporations and agencies.

Content

- PSAS revenue standards
- the government reporting entity and accounting for controlled entities
- PSAS environmental liability standards
- financial instruments and re-measurement gains/losses
- tangible capital assets and impairment
- contractual rights and obligations
- related party and inter-entity transactions
- pensions, employee future benefits and PSAB projects
- loans receivables and loan guarantees
- *PSA Handbook* structure including GAAP hierarchy, public sector guidelines and SORPs

Seminar Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leader

Brian Szabo, CPA, CA

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

SEMINAR MATERIAL — PAPERLESS | OPTIONAL — LAPTOP

PSAS – Specific Topics

LEVEL Advanced

Prerequisite

PSAS – Review of the Standards, or in-depth working familiarity with PSAS.

Overview

This seminar looks at the application of certain of the more complex areas of Public Sector Accounting Standards using real world case examples. Common topics that raise discussions between finance professionals and auditors will be explored in detail and demonstrated in case studies and in shorter discussion exercises.

Course Description

This course looks at the application considerations of using the framework and standards in the *Public Sector Accounting Handbook* when applying to real-life circumstances. It will be of interest to preparers and auditors working in the public sector and will provide strategies considering translation of general standards to the real world. The course is presented using mini-case studies and shorter group exercises. There will be brief refresher on some of the more recent standards including Asset Retirement Obligations and the expected Private/Public Partnerships Standard.

Applicable for

Professionals who prepare, audit or use financial reports in the public sector; or professionals who have a working knowledge of PSAS and are looking to expand that to next level.

Content

- private/public partnerships and government business enterprises – including review of expected new standard
- asset retirement obligations – including review of new standard
- government transfers – issues and differences in application
- controlled entities – specific examples of different situations and relationships
- leased tangible capital assets – both from the government as a leasee and government as a lessor viewpoint
- financial instruments and hedging – including impact of the statement of re-measurement gains and losses
- conceptual framework and financial reporting – including presentation examples
- common issues for local and senior governments – local governments: land swaps, community amenity contributions, senior governments and organizations: endowment funds, net debt accounting, legislated accounting practices

Seminar Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leader

Bill Cox, FCPA, FCA

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

TITLE STATUS — NEW | SEMINAR MATERIAL — PAPERLESS | OPTIONAL — LAPTOP

PSAS – Update 2019

LEVEL Intermediate

Prerequisite

PSAS – Review of the Standards, or general working knowledge of existing PSAS standards.

Overview

A review of new sections in the Public Sector Accounting Handbook along with pending sections, and key projects and activities of the Public Sector Accounting Board.

Course Description

This course is a review of sections in the Public Sector Accounting Handbook that have recently come into effect or will soon come into effect. It can be difficult for professionals to keep up to date given the rate that new standards are arriving. This course will track these standards and pending standards while also providing background and examples.

Applicable for

Professionals working in or serving local governments, senior governments, crown corporations and agencies or other public sector entities.

Content

- reasonably deep dive into the latest PSA HB sections including
  - PS 3280 asset retirement obligations
  - private/public partnerships (draft standard anticipated by time course is presented, but can work with principles in the meantime)
  - PS 3400 Revenue
  - PS 3450, PS 2601, PS 3041, PS 1201, Financial Instruments Narrow Scope Amendments – Financial Instruments and related sections, including explanation and use of Statement of Remeasurement Gains and Losses
  - PS 3430 Restructuring Transactions
- higher level review of recently issued standards, including
  - PS 2200 Related Party Transactions
  - PS 3420 Inter-entity transactions
  - PS 3210 Assets
  - PS 3320 Contingent Assets
  - PS 3380 Contractual Rights
- introduction of the annual improvements concept along with the items in the first annual improvements changes
- review of conceptual framework and new reporting model
- review of other projects in progress and how the impact may play out
- summary of recent PSADG meetings since November 2017

Seminar Material Format

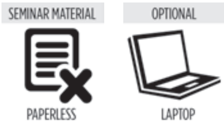
Paperless materials free of charge. Print option available for $20.

Seminar Leader

Bill Cox, FCPA, FCA

Fee $225 | **PD Passport Valid – 1/2 Passport Day** | **3.5 Eligible CPD Hours**

For dates, times and venues – see pages 23 to 24



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".

Applicable for

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!

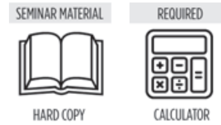
Seminar Material Format

Paperless materials only.

Seminar Leader

Panel TBA

Fee $225 | **PD Passport Valid – 1/2 Passport Day** | **3.5 Eligible CPD Hours**



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.

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.

Applicable for

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

Seminar Material Format

Print copy only, no paperless option.

Special Notes

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

Seminar Leader

Karine Benzacar, MBA, FCPA, FCMA, CFA

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

SEMINAR MATERIAL: PAPERLESS — OPTIONAL: LAPTOP

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.

Applicable for

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

Seminar Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leader

Dr. Vijay Jog

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

SEMINAR MATERIAL: PAPERLESS — OPTIONAL: LAPTOP

Controllership – Operational Management

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 seminar 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 their responsibilities as an operational manager.

Course Description

This course focuses on the steward and operator roles of the controller. The course will give participants the opportunity to reflect on their current role as operational managers and determine which role(s) they need to develop most to add value to their organizations. Specifically, within the operator role, participants will examine essential controller skills and their roles in managing human capital for their organizations. In considering the steward role, participants will examine the financial performance management, information management, and relationship management needed in their organizations. Participants will gain insights, new skills, and many practical tips to improve the overall value they can add to their organizations.

Applicable for

Finance professionals considering a transition to a Controllership position, who are new to the position of Controller, or who are 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 and organizational needs
- Controller as HR manager
- Controller as financial performance manager
- Controller as information & relationship manager

Seminar Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leader

Rieghardt Van Enter, CPA, CMA

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

For dates, times and venues – see page 24

SEMINAR MATERIAL PAPERLESS — OPTIONAL LAPTOP

Controllership – Strategic Leadership

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 seminar 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 needs of the day without adequate time to focus on their influence as catalysts and strategists within their organizations. This seminar provides the opportunity to view the controllership role as a leader and a key strategic partner within the organization, providing tips on how to become the leader their organization needs.

Course Description

This course focuses on the catalyst and strategist roles of the controller. Participants will have a chance to reflect on their leadership styles and what leadership role is most needed for their organizations. Part of this role is to understand how emotional intelligence affects them as leaders and how to work with and lead people from across generations.

Participants will also consider how they can add value as strategic thinkers/leaders in their organizations by understanding and expanding their role in this area. Finally, the controller's role as a change/conflict/crisis manager will be considered as this is an area of increasing importance within a changing economic environment.

Applicable for

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 Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leader

Rieghardt Van Enter, CPA, CMA

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

SEMINAR MATERIAL PAPERLESS — OPTIONAL LAPTOP

Effective Financial Analysis for Business Decisions – Small Businesses

LEVEL Introductory to Intermediate

Prerequisite

None.

Overview

In today's fast-paced world, 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. More than ever, management is looking for well laid out recommendations that go beyond a summary of financial information.

At the end of this seminar, participants will be able to assess a company's business, operational and financial performance including implications of working capital management, impact of growth on financial needs, key aspects of cash flow and budgeting, financial performance indicators and techniques for analyzing financial data and statements for purposes of managerial decision-making, opportunity cost of capital, creating a business case for investment decisions and valuation.

Applicable for

Those who are running as owner/manager or working for/advising owners of privately held firms with less than 50 people and less than $5 million in sales.

Content

- linkages between business and operational performance and financial performance
- business and its implications for the future
- the role of effective working capital management
- key components of an effective financial plan
- time value of money, opportunity cost of capital and capital budgeting
- a reporting/briefing book for effective decision making

Seminar Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leader

Dr. Vijay Jog

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

SEMINAR MATERIAL PAPERLESS
OPTIONAL LAPTOP

Fraud Risk Management

LEVEL Introductory

Prerequisite

None.

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.

Course Description

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.

Applicable for

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

Content Note

There is some overlap between this seminar and *Fraud Happens – What to Do When you Suspect Fraud*, which focuses on COSO Principle 4 and goes into much more detail about relevant investigate and legal tools and techniques to perform investigations.

Seminar Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leader

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

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

SEMINAR MATERIAL PAPERLESS
OPTIONAL LAPTOP

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.

Applicable for

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
- internal control, ISO and quality
- controlling the budget process
- spreadsheet controls
- getting buy-in across the organization

Seminar Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leader

Jeffrey Sherman, MBA, CIM, FCPA, FCA

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

 For dates, times and venues – see page 24

SEMINAR MATERIAL PAPERLESS

OPTIONAL LAPTOP

Internal Controls – Industry Sector

LEVEL Intermediate

Prerequisite

Participants should be familiar with the COSO framework.

Overview

This seminar provides an overview of the main concepts of internal control and its components, focusing on the COSO framework.

Course Description

This seminar 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, as well as the importance of addressing segregation of duties. This seminar will also provide an overview of the effect that technology has on internal controls and how to monitor whether the internal controls in your organization are effective.

Applicable for

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
  - consequences of non-compliance/monitoring
- can this help documentation assist your auditor or review engagement accountant

Ethics Content

This seminar contains 0.75 hours of ethics content.

Seminar Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leader

Robin Diehl, CPA, CA, CBV

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

SEMINAR MATERIAL PAPERLESS

OPTIONAL LAPTOP

Management Accounting - Fundamentals

LEVEL Introductory

Prerequisite

None.

Overview

For professional accountants who have not exercised those management accounting muscles in some time (maybe since university), this course will help participants apply management accounting concepts to generate new ideas for problem solving.

Course Description

Common associations with management accounting include cost accounting, break even analysis and variance analysis. However, management accounting concepts include so much more such as organizational behavior and employee motivation. It is exciting to learn that the world of management accounting includes, for example, research on workplace altruism. At the center of all these concepts in management accounting is their application to creative problem solving.

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.

Applicable for

This course is targeted to professional accountants who are transitioning into a managerial accounting role (or responsibilities) and require a refresher of key concepts. The course has been designed to provide an overview of selected key topics in management accounting.

Content

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

Seminar Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leader

Erin Rao, CPA, CA

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

TITLE STATUS: NEW | SEMINAR MATERIAL: PAPERLESS | OPTIONAL: LAPTOP

Marketing Your Business Without Breaking the Bank

LEVEL Introductory

Prerequisite

None.

Overview

This full day workshop is designed to give small and micro business owners a solid background and skill building session to help them market their business.

Small business owners wear many hats, so time and tasks are always competing for attention. Marketing is often an afterthought. In this course, participants will learn marketing and advertising skills, tools and techniques to help take their business to the next level.

By the end of this course, participants will be able to

- create engaging and relevant content for websites, blogs, and other marketing assets
- leverage social media to reach more potential customers
- optimize website content to attract search engines and increase website traffic

Applicable for

Small and micro business owners interested in better marketing their business.

Content

- basic marketing principles
- basic business branding principles
- tips and tools for writing engaging business copy (for websites, ads or other marketing assets)
- social media marketing and advertising tools
  - Facebook, Instagram, Linkedin, Twitter, etc
- digital platforms: websites, blogs
- email marketing
- the basics of SEO (Search Engine Optimizations)
- the basics of Google Adwords and search marketing
- content creation (photos, posts, articles, etc)

Seminar Material Format

Paperless materials only.

Seminar Leader

Carson McKee

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

SEMINAR MATERIAL: HARD COPY | REQUIRED: CALCULATOR

Powerful Financial Analysis

LEVEL Introductory to Intermediate

Prerequisite

None.

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.

Applicable for

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

This course does not discuss the accounting for financial instruments.

Seminar Material Format

Print copy only, no paperless option.

Special Notes

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.

Seminar Leader

Karine Benzacar, MBA, FCPA, FCMA, CFA

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

For dates, times and venues – see page 24

SEMINAR MATERIAL PAPERLESS · OPTIONAL LAPTOP

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.

Applicable for

Accountants in leadership positions, such as Controllers, CFOs and directors of finance, and those moving toward these roles, as well as financial analysts, and those in public practice or consulting, who advise clients.

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
- extra creative thinking for accountants
- auditors & lawyers: working better together
- more useful financial reporting
- straight talk on ethics
- critical steps when you first take a new job

Seminar Material Format

Paperless materials only.

Ethics Hours

This seminar is eligible for 1 hour of ethics content.

Seminar Leader

Stephen Priddle, CPA, CA, CMA

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

SEMINAR MATERIAL PAPERLESS · OPTIONAL LAPTOP

Writing & Maintaining Task-Based Procedures

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.

Applicable for

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.

Seminar Material Format

Paperless materials only.

Seminar Leader

Duncan Kent, BA, MA

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

Finance

SEMINAR MATERIAL PAPERLESS

OPTIONAL LAPTOP

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.

Applicable for

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

Seminar Material Format

Paperless materials free of charge. Print option available for $20.

Special Notes

A portion of this seminar will be hands-on. Though not mandatory, you are encouraged to bring a laptop to work along on Excel spreadsheet templates. These templates will be made available to registrants prior to the seminar, and you are encouraged to download them onto your device prior to arriving in class.

Seminar Leader

Antoine Bishara, CPA, CA, CFA

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

For dates, times and venues – see pages 24 to 25

SEMINAR MATERIAL PAPERLESS | OPTIONAL LAPTOP

Business Valuations - Advanced

LEVEL Advanced

Prerequisite

Business Valuations – Fundamentals, or experience working with business valuations is recommended.

Overview

Building on the concepts of *Business Valuations - Fundamentals*, 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.

Course Description

This course will provide participants with the ability to challenge and critique specific elements of a business valuation. The basic approaches that are introduced in *Business Valuations – Fundamentals* are dissected in detail such that practitioners will be able to recognize the limitations of various valuation approaches and will be provided with information that will allow them to conduct supplementary analysis for a more robust conclusion of value. The course utilizes a detailed case study that builds upon itself for each module that allows for practical application.

Applicable for

Professionals who have some experience with business valuations who are seeking a deeper understanding of the more complex issues surrounding business valuation. Past attendees include public practice practitioners who have provided some business valuation advice in the past and company executives involved in the purchase or sale of businesses.

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 Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leader

Ian Wanke, CPA, CA, CFA, CBV

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

SEMINAR MATERIAL PAPERLESS | OPTIONAL LAPTOP

Business Valuations - Fundamentals

LEVEL Introductory

Prerequisite

None.

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 under an asset approach, income approach, and market approach.

Course Description

This course will provide participants with the basic tools to approach a business valuation. Whether they are assessing the reasonability of a transaction (e.g. a market transaction or a tax initiated process) or providing advice on a potential transaction, this course will provide candidates with the basic knowledge of what to look for, and where to be cautious. It will also provide candidates with a means of triangulating valuation conclusions in order to cross-check or preliminary findings. The course utilizes a detailed case study that builds upon itself for each module that allows for practical application.

Applicable for

Those in industry and practitioners with limited to no valuation experience who are seeking a better understanding of business valuation principles and practices. Past attendees have included Controllers, CFOs, Finance Directors who are starting to see a need to conduct business valuations either for financial/tax reporting or for mergers and acquisitions. Past attendees also included Audit and Tax public practice professionals looking to increase or refresh their specialized knowledge set.

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 Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leader to be drawn from

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

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

SEMINAR MATERIAL OPTIONAL
PAPERLESS LAPTOP

Business Valuations – Purchase Price Allocation

LEVEL Advanced

Prerequisite

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

Overview

This seminar will teach participants how to approach a purchase price allocation for financial reporting purposes after a business acquisition or combination closes. The seminar provides a summary of valuation techniques used for specific, identifiable intangible assets and provides a step by step review of sample calculations for valuing different types of intangible assets resulting from a business purchase.

Course Description

The course will provide participants with tools that will allow them to prepare a purchase price allocation with less support from an outsourced advisor than they otherwise might use. It will teach participants how to segment enterprise cash flows based on capital charges and how to allocate them to different intangible assets, as well as how to assess the relative riskiness of different types of intangible assets that result from a business acquisition or combination.

Applicable for

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 and process of a purchase price allocation
- review of different intangible assets
- trade-mark valuation techniques
- technology and trade secrets valuation techniques
- non-competition agreement valuation techniques
- work force valuation techniques
- customer relations and order book valuation techniques
- reconciliation of purchase price allocations

Seminar Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leader

Fred Tang, CPA, CA, CBV

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

SEMINAR MATERIAL OPTIONAL
PAPERLESS LAPTOP

Cash and Treasury Management

LEVEL Intermediate

Prerequisite

None.

Overview

Cash management is a core administrative function in any business. This seminar reviews contemporary issues in cash and treasury management including improving cash forecasts, optimizing cash flows, financial risk management and measuring value-at-risk. You will be exposed to state-of-the-art changes in the world of the cash and treasury management, exchange ideas with peers, and leave with fresh insights to improve cash management.

Whether you are new to the field or experienced at cash management, you will leave with new ideas and a fresh perspective.

Applicable for

Financial managers and treasurers, including controllers, analysts, and senior accountants, looking for a refresher or a primer on cash and treasury management, as well as accountants and consultants who advise clients.

Content

- cash management refresher
- budgets, forecasts and projections: direct and indirect cash flows
- oversight, control and risk management
- why you need to know about the Group of 30
- dealing with your banker
- reducing costs for foreign currency transactions
- tips when using derivatives
- managing capital structure
- Blockchain, bitcoin and virtual currencies

Seminar Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leader

Jeffrey Sherman, MBA, CIM, FCPA, FCA

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

For dates, times and venues – see pages 24 to 25

SEMINAR MATERIAL PAPERLESS | OPTIONAL LAPTOP

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.

Applicable for
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.

Seminar Material Format
Paperless materials free of charge. Print option available for $20.

Seminar Leader
Antoine Bishara, CPA, CA, CFA

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

SEMINAR MATERIAL PAPERLESS | OPTIONAL LAPTOP

Due Diligence for Acquisitions

LEVEL Intermediate

Prerequisite
Post-secondary level course in Finance or equivalent knowledge; or basic understanding of, or experience in, mergers & 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. This seminar will deepen participants' understanding of the things to consider, plan and watch for in M & A transactions.

Course Description
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.

Applicable for
Financial managers and accountants 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
- M&A process overview
- planning for the transaction
- financial review: quality of earnings and normalized EBITDA, net working capital and net debt
- financial, human resources, legal and operational reviews
- purchase agreement and purchase price adjustments
- integration matters
- common findings and conclusion

Seminar Material Format
Paperless materials free of charge. Print option available for $20.

Seminar Leaders
Sandra Suh, CPA, CA, CBV
Kevin Zhao

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

SEMINAR MATERIAL: PAPERLESS — OPTIONAL: LAPTOP

Financing Strategies

LEVEL Intermediate

Prerequisite

Participants should have a basic understanding of, or experience in, financing transactions.

Overview

This seminar will provide an in-depth review of the various forms of financing to fund capital projects or acquisitions, or to restructure an existing capital structure. The seminar will dive into the practical details of what capital providers are seeking, issues that can 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.

Course Description

Participants will gain a sense of financing process, terms, and risk associated with multiple types of capital, including term debt and operating lines of credit, asset-based loans, mezzanine finance, private equity, venture capital, public equity markets, and government finance programs. Upon completion, participants should be armed with the tools to either engage in a direct dialogue with various financiers, or better interact with an intermediary / agent working on their behalf.

Applicable for

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 and public equity and convertible debentures
- understanding cost of capital
- cost of capital and investment decisions
- financing process and negotiating strategies

Seminar Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leaders

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

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 CPD Hour**

SEMINAR MATERIAL: HARD COPY — REQUIRED: CALCULATOR

Treasury & Finance for Accountants

LEVEL Introductory

Prerequisite

None.

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.

Applicable for

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 Material Format

Print copy only, no paperless option.

Special Notes

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.

Seminar Leader

Karine Benzacar, MBA, FCPA, FCMA, CFA

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

For dates, times and venues – see pages 24 to 25

Information & Business Technology

SEMINAR MATERIAL — PAPERLESS

OPTIONAL — LAPTOP

Advanced Data Magic with Excel

LEVEL Advanced

Prerequisite

Experienced Excel user.

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.

Applicable for

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
- use 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 Material Format

Paperless materials only.

Special Notes

This is NOT a hands-on seminar. This course will be taught in Excel for Office 365 with reference to the differences to Excel 2010 and subsequent. 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.

Seminar Leader

Karen Granville, Hons. BMath

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

SEMINAR MATERIAL PAPERLESS | NOTABLE FORMAT HANDS-ON | REQUIRED LAPTOP

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.

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.

Applicable for
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

Seminar Material Format
Paperless materials only.

Special Notes
This is a hands-on seminar. Please bring a laptop with one of the programs listed: 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)

Seminar Leader
Ken Puls, FCPA, FCMA

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

SEMINAR MATERIAL PAPERLESS | OPTIONAL LAPTOP

Blockchain and Emerging Technologies

LEVEL Intermediate

Prerequisite
Basic understanding of computer operations and terminology.

Overview
Blockchain and other emerging technologies will affect every industry and profession. For example, some products have already implemented machine learning and artificial intelligence to help you be more effective. Further, process automation tools are now available for small and mid-sized businesses. In this "how-to" session, you will learn about emerging technologies that directly affect business professionals. While many emerging technologies are not yet ready for prime-time, some of them are. With the cookbook approach used in this session, you will see how tools available now can help you and your team be more productive, efficient, and effective.

Applicable for
Business professionals who are interested in how blockchain and emerging technologies will affect them and seek an update on the status of these technologies.

Content
- major emerging technology trends and their importance as it relates to accounting
- how Robotic Process Automation is changing the landscape of traditional accounting and financial functions
- major updates, strategies, and opportunities that include artificial intelligence and machine learning from leading software publishers
- differentiate between the most useful emerging technology tools and implement practical solutions to take advantage of these opportunities
- the potential impact of implementing an emerging technology strategy to improve financial and operational reporting
- leading tools available today and the importance of facilitating the adoption of emerging technologies in your organization

Seminar Material Format
Paperless materials only.

Seminar Leader to be drawn from
Ward Blatch, CPA, CA
Jason Hastie, MPAcc, CPA, CA

Fee $225 **PD Passport Valid – 1/2 Passport Day** **3.5 Eligible CPD Hours**

For dates, times and venues – see pages 25 to 26

SEMINAR MATERIAL: PAPERLESS | NOTABLE FORMAT: HANDS-ON | REQUIRED: LAPTOP

Building a Financial Model of a Company

LEVEL Intermediate

Prerequisite

Fundamental knowledge of accounting and capability working with 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.

Applicable for

Those who want to design and create a dynamic financial model of a company that adheres to the highest industry standards. **Note that this seminar is not designed for macOS-based Excel.**

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 Material Format

Paperless materials only.

Special Notes

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

Seminar Leader

The Marquee Group

Fee $450 | PD Passport Valid – 1 Passport Day | 7 Eligible CPD Hours

SEMINAR MATERIAL: PAPERLESS | OPTIONAL: LAPTOP

Cloud Computing: The Future is Here

LEVEL Intermediate

Prerequisite

Fundamental knowledge of computer operations and internet usage.

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.

Applicable for

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
- create a road map for selecting a cloud-based solution and migrating to it
- recognize 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 Material Format

Paperless materials only.

Special Notes

This is not a hands-on seminar.

Seminar Leader

Ward Blatch, CPA, CA

Fee $450 | PD Passport Valid - 1 Passport Day | 7 Eligible CPD Hours

SEMINAR MATERIAL: PAPERLESS | NOTABLE FORMAT: HANDS-ON | REQUIRED: LAPTOP

Creating Vibrant Dashboards

LEVEL Intermediate to Advanced

Prerequisite

Fundamental knowledge of Excel.

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.

Applicable for

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

Seminar Material Format

Paperless materials only.

Special Notes

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

Seminar Leader

Ken Puls, FCPA, FCMA

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

TITLE STATUS: NEW | SEMINAR MATERIAL: PAPERLESS | NOTABLE FORMAT: HANDS-ON | REQUIRED: LAPTOP

Cyber Security and Awareness

LEVEL Introductory

Prerequisite

None.

Overview

Digital technologies have become such an important part of our lives, it's hard to remember life before the Internet or smart devices. Yet for all their convenience, they are not without risks – and not only large companies are targeted for cyber attacks.

This seminar will help you become more cyber aware as you learn essential tips, tricks and takeaways that you can use to help defend against common cyber-attacks aimed at your home or office. You'll learn from a "white hat hacker", who will show you how easy it is for hackers to access your computers and systems using readily available technology, and will learn how to safely set up your systems to reduce vulnerability to cyber-attacks.

Applicable for

Anyone who is concerned about cyber-security at work or at home.

Content

- the cyber security landscape and key trends that you should be aware of
- techniques to better protect your digital identities
- how to install a VPN, use multi-factor authentication and other practical guidance to help you safely use the Internet from your phone, your computers and your smart devices
- how to protect yourself from ransomware and recognize phishing attacks
- simple configurations to help improve the security of your home network
- what to do if you suspect a breach

Seminar Material Format

Paperless materials only.

Special Notes

This is a hands-on seminar, please bring a laptop or mobile device with you.

Seminar Leaders

Guy Rosario, ITL
Jason Stevenson, CPA, CMA, CRISC, CISA, CISSP

Fee $225 | **PD Passport Valid – 1/2 Passport Day** | **3.5 Eligible CPD Hours**

For dates, times and venues – see pages 25 to 26

SEMINAR MATERIAL: PAPERLESS | NOTABLE FORMAT: HANDS-ON | REQUIRED: LAPTOP

Data Analysis & Communication with Excel

LEVEL Intermediate to Advanced

Prerequisite

Fundamental knowledge of Excel. Note that this seminar is not designed for macOS-based Excel.

Overview

This course provides practical tips and hands-on application to a variety of data management, charting and formatting skills in an Excel environment. Participants will build a series of charts that complete a sample dashboard that provides summary analysis and detailed displays of the underlying data. A variety of chart types will be explored. Automating titles, creating informative labels and text boxes and learning best practices for dashboard design and construction will also be covered.

Applicable for

Accountants who are interested in enhancing their skills to use Excel to communicate using charts and organize data.

Content

Communicate with the optimal chart types and formatting

- determine the optimal chart for presenting types of data
- learn design ideas for simple and elegant charts
- learn complex chart structures such as bubble charts and multiple chart styles in a single chart
- use slicers and other tools to rapidly create interactive and flexible analysis

Data organization and manipulation best practices

- organize and manage data effectively for chart and table creation
- employ sophisticated automation techniques to manage data
- use pivot tables to build powerful data analysis capabilities and link them to charts
- pivot table formatting techniques to enable their use in reports and dashboards

Powerful formatting and automation techniques

- use formulas to automate titles and labels with special techniques for format control
- use conditional formatting for unique data display and highlighting techniques
- eliminate footnotes and excess comments by using text functions to automatically create powerful descriptions in your charts and tables
- chart formatting tips to simplify chart creation and to build elegant and easily maintained visual reports

Seminar Material Format

Paperless materials only.

Special Notes

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

Seminar Leader

The Marquee Group

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

TITLE STATUS: NEW | SEMINAR MATERIAL: PAPERLESS | NOTABLE FORMAT: HANDS-ON | REQUIRED: LAPTOP

DAX Formulas for PowerPivot

LEVEL Advanced

Prerequisite

Participants **must** have experience using PivotTables and Power Pivot. Previous attendance at *Getting Started with Power Pivot* (formerly *Data Analysis Expressions using PowerPivot*) is recommended but not mandatory.

Overview

While a well-related model is a core part of making Power Pivot sing, understanding DAX formulas is what really takes your Power Pivot to the next level. This course is intended to help you up your DAX game so that you can make your PivotTables show the exact aggregations you need. From creating simple measures to controlling % of grand totals which don't lose their context upon filtering, to advanced patterns to control date period intelligence, we'll cover it here.

If you've grown into Power Pivot but haven't spent time studying DAX to any level of depth, this course is for you. After this course, you'll be comfortable rolling your own custom measures to make your projects report EXACTLY the way you want.

Applicable for

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

Content

- review of dimensional modelling terms and techniques and recommended practices
- building basic DAX measures from scratch
- understanding "Filter Context" and how it applies to formula calculation
- debugging a measure
- using CALCULATE() and ALL() to truly master your filter context
- advanced conditional logic patterns
- using iterator functions like SUMX() and AVERAGE()
- advanced time intelligence patterns

Seminar Material Format

Paperless materials only.

Special Notes

This is a hands-on course. Participants should bring a laptop running one of the following: Excel 2013 Professional Plus or Excel 2013 ProPlus with the free Power Query add-in installed; Excel 2016 or higher; Excel 365. Note that MAC Excel: PowerPivot CANNOT be installed in any version.

Seminar Leader

Ken Puls, FCPA, FCMA

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

SEMINAR MATERIAL: PAPERLESS | NOTABLE FORMAT: HANDS-ON | REQUIRED: LAPTOP

Excel: Specific Skills for Budgeting, Planning & Forecasting

LEVEL Intermediate

Prerequisite

Fundamental knowledge of Excel 2007 or newer.

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.

Applicable for

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 Material Format

Paperless materials only.

Special Notes

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

Seminar Leader

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

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

SEMINAR MATERIAL: PAPERLESS | NOTABLE FORMAT: HANDS-ON | REQUIRED: LAPTOP

Excel: Specific Skills for Creating Custom Solutions with Macros

LEVEL Intermediate

Prerequisite

Fundamental knowledge of Excel 2007 or newer.

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.

Applicable for

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 Material Format

Paperless materials only.

Special Notes

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

Seminar Leader

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

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

For dates, times and venues – see pages 25 to 26

SEMINAR MATERIAL: PAPERLESS | NOTABLE FORMAT: HANDS-ON | REQUIRED: LAPTOP

Excel: The Next Level of Skills

LEVEL Advanced

Prerequisite

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

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.

Applicable for

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 Material Format

Paperless materials only.

Special Notes

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

Seminar Leader

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

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

SEMINAR MATERIAL: PAPERLESS | NOTABLE FORMAT: HANDS-ON | REQUIRED: LAPTOP

Excel Boot Camp

LEVEL Intermediate

Prerequisite

Fundamental knowledge of Excel 2010 or newer.

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.

Applicable for

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 Material Format

Paperless materials only.

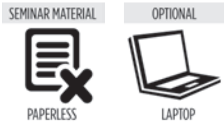
Special Notes

This is a hands-on seminar. This course will be taught in Excel for Office 365 with reference to the differences to Excel 2010 and subsequent. The program focuses on Excel for Windows and we encourage you to bring your windows laptop equipped with Excel 2010 or newer.

Seminar Leader

Karen Granville, Hons. BMath

Fee $785 | **PD Passport Valid - 2 Passport Days** | **14 Eligible CPD Hours**



Excel Data Magic, Including Advanced PivotTables & Power Pivot

LEVEL Advanced

Prerequisite

Full understanding of intermediate to advanced PivotTables. Specific software will be used to teach this seminar.

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.

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.

Applicable for

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 Material Format

Paperless materials only.

Special Notes

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.

Seminar Leader

Marion Williams

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

Excel Financial Models and Analysis

LEVEL Advanced

Prerequisite

Intermediate knowledge of Excel 2007 or newer.

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.

Applicable for

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 Material Format

Paperless materials only.

Special Notes

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

Seminar Leader

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

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

For dates, times and venues – see pages 25 to 26

SEMINAR MATERIAL — PAPERLESS | OPTIONAL — LAPTOP

Excel Tips, Tricks and Techniques for Accountants

LEVEL Intermediate

Prerequisite

Fundamental knowledge of Microsoft Office Excel 2007 or newer.

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.

Applicable for

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, 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 Material Format

Paperless materials only.

Special Notes

This is not a hands-on seminar. This course will be taught in Excel for Office 365 with reference to the differences to Excel 2010 and subsequent. 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.

Seminar Leader

Marion Williams

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

SEMINAR MATERIAL — PAPERLESS | NOTABLE FORMAT — HANDS-ON | REQUIRED — LAPTOP

Financial Modeling – DCF Valuation Analysis

LEVEL Intermediate

Prerequisite

Fundamental knowledge of accounting and capability working with Excel.

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.

Applicable for

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

Seminar Material Format

Paperless materials only.

Special Notes

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

Seminar Leader

The Marquee Group

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

Financial Modeling in Excel

LEVEL Intermediate

Prerequisite

Fundamental knowledge of Excel.

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.

Applicable for

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

Seminar Material Format

Paperless materials only.

Special Notes

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.

Seminar Leader

Antoine Bishara, CPA, CA, CFA

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

Getting Started with Excel PowerPivot

(formerly Data Analysis Expressions with PowerPivot)

LEVEL Advanced

Prerequisite

Participants **must** have experience using PivotTables, and must bring a laptop with the programs as listed in Special Notes below.

Overview

Built-in to Microsoft Excel, Power Pivot is a technology that is revolutionizing the way that we look at data. 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 Power Pivot is making in the business intelligence landscape. Have you ever wanted to flip the sign half-way down your PivotTable so that Revenues and Expenses are BOTH shown using positive numbers, and the bottom line still adds correctly? This is completely possible with Power Pivot using its DAX formula language. Developed by a CPA with real world experience who is also a renowned Business Intelligence expert, this course is intended to teach you the right way to use Power Pivot.

Applicable for

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

Content

- importing data to Power Pivot with Power Query
- solving the Un-vlookupable Problem
- dimensional modelling terms and techniques
- solving common join problems
- building basic DAX measures from scratch
- understanding “Filter Context” and how it applies to formula calculation
- key measure patterns to make your PivotTables sing
- performance considerations

Seminar Material Format

Paperless materials only.

Special Notes

This is a hands-on course. Participants should bring a laptop running one of the following: Excel 2013 Professional Plus or Excel 2013 ProPlus with the free Power Query add-in installed; Excel 2016 or higher; Excel 365. Note that MAC Excel: PowerPivot CANNOT be installed in any version.

Seminar Leader

Ken Puls, FCPA, FCMA

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

For dates, times and venues – see pages 25 to 26

SEMINAR MATERIAL 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.

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.

Applicable for

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 Material Format

Paperless materials only.

Seminar Leader

Garrett Wasny, MA, CMC, CITP/FITP

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

SEMINAR MATERIAL PAPERLESS

NOTABLE FORMAT HANDS-ON

REQUIRED LAPTOP

Intro-Mediate Excel Techniques

LEVEL Intermediate

Prerequisite

Working experience with Excel.

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.

Applicable for

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 Material Format

Paperless materials only.

Special Notes

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

Seminar Leader

Ken Puls, FCPA, FCMA

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

SEMINAR MATERIAL: PAPERLESS | NOTABLE FORMAT: HANDS-ON | REQUIRED: LAPTOP

Managing Financial Data With Excel

LEVEL Intermediate to Advanced

Prerequisite

Intermediate knowledge of and capability working with Excel.

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.

Applicable for

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

Seminar Material Format

Paperless materials only.

Special Notes

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

Seminar Leader

The Marquee Group

Fee $450 | **PD Passport Valid – 1 Passport Day** | **7 Eligible CPD Hours**

SEMINAR MATERIAL: PAPERLESS | NOTABLE FORMAT: HANDS-ON | REQUIRED: LAPTOP

Modeling Project Finance: Real Estate

LEVEL Intermediate

Prerequisite

Fundamental knowledge of, and capability working with Excel.

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.

Applicable for

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)

Seminar Material Format

Paperless materials only.

Special Notes

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.

Seminar Leader

Antoine Bishara, CPA, CA, CFA

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

For dates, times and venues – see pages 25 to 26

SEMINAR MATERIAL — PAPERLESS | NOTABLE FORMAT — HANDS-ON | REQUIRED — LAPTOP

Optimizing Data for Power Pivot using Power Query

LEVEL Advanced

Prerequisite

Participants must have experience using Power Pivot.

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.

Applicable for

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 Material Format

Paperless materials only.

Special Notes

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)

Ensure the Power Pivot Tab is showing in Excel before the course.

Power Query

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

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

Seminar Leader

Ken Puls, FCPA, FCMA

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

SEMINAR MATERIAL — PAPERLESS | OPTIONAL — LAPTOP

Paperless Office

LEVEL Intermediate

Prerequisite

Fundamental knowledge of computer operations.

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.

Applicable for

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

Seminar Material Format

Paperless materials only.

Special Notes

This is not a hands-on seminar.

Seminar Leader to be drawn from

Ward Blatch, CPA, CA
Jason Hastie, MPAcc, CPA, CA

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

SEMINAR MATERIAL PAPERLESS | NOTABLE FORMAT HANDS-ON | REQUIRED 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.

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.

Applicable for
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 Material Format
Paperless materials only.

Special Notes
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.

Seminar Leader
Ken Puls, FCPA, FCMA

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

SEMINAR MATERIAL PAPERLESS | OPTIONAL LAPTOP

Tech Tools and Gadgets for a More Efficient You

LEVEL Intermediate

Prerequisite
Fundamental knowledge of computer operations.

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.

Applicable for
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 Material Format
Paperless materials only.

Special Notes
This is not a hands-on seminar., This course will be taught in the Office 365 desktop applications with reference to the differences to Office 2010 and subsequent. The program focuses on Office for Windows and we encourage you to bring your windows laptop equipped with Office 2010 or newer.

Seminar Leader
Ward Blatch, CPA, CA

Fee $225 **PD Passport Valid – 1/2 Passport Day** **3.5 Eligible CPD Hours**

For dates, times and venues – see pages 25 to 26

SEMINAR MATERIAL PAPERLESS

OPTIONAL LAPTOP

Technology Update

LEVEL Intermediate

Prerequisite

Fundamental understanding of basic technology concepts.

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 half 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.

Applicable for

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 Material Format

Paperless materials only.

Special Notes

This is not a hands-on seminar.

Seminar Leader to be drawn from

Ward Blatch, CPA, CA
Jason Hastie, MPAcc, CPA, CA

Fee $225 **PD Passport Valid – 1/2 Passport Day** **3.5 Eligible CPD Hours**

SEMINAR MATERIAL PAPERLESS

OPTIONAL LAPTOP

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

LEVEL Intermediate

Prerequisite

Fundamental knowledge of Microsoft Office applications.

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.

Applicable for

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 Material Format

Paperless materials only.

Special Notes

This is not a hands-on seminar. This course will be taught in the Office 365 desktop applications with reference to the differences to Office 2010 and subsequent. The program focuses on Office for Windows and we encourage you to bring your windows laptop equipped with Office 2010 or newer.

Seminar Leader

Jason Hastie, MPAcc, CPA, CA

Fee $225 **PD Passport Valid – 1/2 Passport Day** **3.5 Eligible CPD Hours**

People Management & Personal Development

Communication & Negotiation

Problem-Solving & Decision Making

Professional & Ethical Behaviour

Self-Management

Teamwork & Leadership

SEMINAR MATERIAL PAPERLESS   OPTIONAL LAPTOP

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.

Applicable for

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

Seminar Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leader

Helen Wale, MA, CPHR, CECX

Fee $450   **PD Passport Valid - 1 Passport Day**   **7 Eligible CPD Hours**

SEMINAR MATERIAL PAPERLESS   OPTIONAL LAPTOP

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.

Applicable for

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 ..."

Seminar Material Format

Paperless materials only.

Seminar Leader

Margaret Hope, M.ED

Fee $450   **PD Passport Valid - 1 Passport Day**   **7 Eligible CPD Hours**

SEMINAR MATERIAL OPTIONAL
PAPERLESS LAPTOP

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.

Applicable for

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

Seminar Material Format

Paperless materials only.

Seminar Leader

Pam Penner

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

SEMINAR MATERIAL OPTIONAL
PAPERLESS LAPTOP

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.

Applicable for

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

Seminar Material Format

Paperless materials only.

Seminar Leader

Sharon Edwards

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

For dates, times and venues – see pages 26 to 27

SEMINAR MATERIAL: PAPERLESS | OPTIONAL: LAPTOP

Conflict: Changing Viewpoints & Influencing Behaviors

LEVEL Introductory to intermediate

Prerequisite

None.

Overview

Conflict is a daily reality for all of us. In personal and business dealings, we invariably encounter disagreements, disputes and visceral conflicts. While most seek to avoid or shy away from conflict, properly handled, it is a wonderful opportunity for change, growth and mutual profit improvement. When mismanaged, it's a disruptive, debilitating and destructive force that leads to escalating emotions and takes a devastating toll on relationships. If you're uncomfortable with conflict, suppress your true feelings or are overly accepting of the obnoxious behaviour of others, this course is for you.

Applicable for

Anyone who is uncomfortable dealing with interpersonal conflict.

Content

In this fast-paced, highly practical course, discover how to

- recognize the positive potential of conflict
- turn conflict into opportunities for problem solving and behaviour modification
- deal effectively with confrontation, problem behaviour, intimidation, criticism, emotional blackmail and gamesmanship
- get off the defensive and prevent time-consuming disagreements
- discover your "hot buttons" and develop self-control
- deal with miserable, insensitive and obnoxious "difficult" people
- increase your personal effectiveness, credibility and capacity to influence others

Seminar Material Format

Paperless materials only.

Seminar Leader

Dr. Jim Murray

Fee $475 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

TITLE STATUS: NEW | SEMINAR MATERIAL: PAPERLESS | OPTIONAL: LAPTOP

Creating Healthy Conflict in the Workplace

LEVEL General

Prerequisite

None.

Overview

There is no such thing as a conflict free work environment, as that is where growth happens. Conflicts are a natural, and necessary, part of life. Instead, of working with conflict once it has escalated, it is important to develop skills that will enable an organization to innovate and grow, challenging the status quo and learning from the organic nature of conflict.

By the end of the seminar, participants will

- learn the power of engagement and what the organizational impacts are of disengagement
- learn how to assess levels of engagement
- engage in a diagnosis of emerging team issues and misalignments so they can be proactive involved before they become problems
- be knowledgeable about norms for decision-making and conflict
- develop tools for channeling conflict into innovation

Applicable for

Anyone who wants to learn how to engage in conflict in healthy, productive, and proactive ways, and those who want to be equipped with collaborative skills in order to move an organization forward and grow.

Content

- defining conflict
- sources of team misalignments
- environmental misalignments
- individual misalignments
- misalignments checklist
- taking the team temperature
- setting norms for decision-making and conflict
- turning conflict into innovations
- bringing it back to vision/purpose

Seminar Material Format

Paperless materials only.

Seminar Leader

Casey Miller

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

TITLE STATUS: NEW | SEMINAR MATERIAL: PAPERLESS | OPTIONAL: LAPTOP

Presentation Skills for Introvert Accountants

LEVEL General

Prerequisite

None.

Overview

Presentation skills are a great asset in developing a business career. This full day workshop is designed to give accounting professionals increased confidence and skills in building and delivering presentations.

Have you ever wanted to be more confident in giving presentations? Does the very thought of public speaking fill you with dread? This session will provide you with tools and tips to build your confidence in delivering effective and engaging presentations. Public speaking is often rated as peoples' #1 fear but it doesn't have to be this way! With coaching and practice, anyone can learn how to build a great presentation and harness tips and tricks to become a more polished and confident speaker.

By the end of this course, participants will be able to

- structure a presentation for maximum effect
- gain confidence in public speaking
- handle questions and overcoming objections
- build effective presentations both visually and verbally

Applicable for

Professionals at any stage of their business career.

Content

- unpacking the myth about shyness
- breaking down the elements of a great presentation
- gaining confidence with public speaking through exercises and activities
- activities for quick thinking
- understanding body language and its effects
- creating strong visuals (with PowerPoint or presentation media)
- handling questions and objections

Seminar Material Format

Paperless materials only.

Seminar Leader

Carson McKee

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

SEMINAR MATERIAL: PAPERLESS | OPTIONAL: LAPTOP

Principles of Negotiation

LEVEL General

Prerequisite

None.

Overview

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.

Applicable for

Anyone interested in improving their negotiation skills.

Content

- 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

Seminar Material Format

Paperless materials only.

Seminar Leader

Tammy Towill, FCPA, FCMA

Fee $225 | **PD Passport Valid – 1/2 Passport Day** | **3.5 Eligible CPD Hours**

For dates, times and venues – see pages 26 to 27

SEMINAR MATERIAL
HARD COPY

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.

Applicable for

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

Seminar Material Format

Print copy only, no paperless option.

Seminar Leader

Duncan Kent, BA, MA

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

SEMINAR MATERIAL OPTIONAL
PAPERLESS LAPTOP

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.

Applicable for

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

Content

- defining and exploring behavior
- 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

Seminar Material Format

Paperless materials only.

Seminar Leader

Pam Penner

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

SEMINAR MATERIAL PAPERLESS — OPTIONAL LAPTOP

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

Applicable for
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

Seminar Material Format
Paperless materials only.

Seminar Leaders
Sharon Edwards

Fee $450 **PD Passport Valid – 1 Passport Day** **7 Eligible CPD Hours**

SEMINAR MATERIAL PAPERLESS — OPTIONAL LAPTOP

You're Speaking – But Are You Connecting?

LEVEL General

Prerequisite
None.

Overview
Yes, there is a better way, and an easier way, to get the results you want when you speak to others. In this half-day program, you'll learn to make minor changes to your personal speaking style yet see and feel a major improvement with each audience you address.

You'll leave with ideas and skills that will help you get results using less time. This session will also help you reduce the symptoms of anxiety. You'll enjoy speaking more and your audiences will appreciate hearing from you.

Applicable for
No matter whether you are a seasoned speaker, facing your first major presentation, or somewhere in between, this seminar will make an enormous difference to your speaking skills and self-confidence.

Content
- now how to use your preparation time for best results
- know how to inject your personality into your presentations
- know how to make each of your listeners feel you are really talking to them
- know how to add humour and excitement when your audience most needs it
- know how to handle difficult speaking situations and what to do when things go wrong

Seminar Material Format
Paperless materials only.

Seminar Leader
Margaret Hope, M.Ed

Fee $225 **PD Passport Valid – 1/2 Passport Day** **3.5 Eligible CPD Hours**

For dates, times and venues – see pages 26 to 27

SEMINAR MATERIAL PAPERLESS · OPTIONAL LAPTOP

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.

Applicable for

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

Seminar Material Format

Paperless materials only.

Seminar Leader

Lesley-Ann Marriott, CEC, PCC

Fee $450 **PD Passport Valid – 1 Passport Day** **7 Eligible CPD Hours**

TITLE STATUS NEW · SEMINAR MATERIAL PAPERLESS · OPTIONAL LAPTOP

Achieving Results Through Collaborative Projects

LEVEL Intermediate

Prerequisite

Knowledge of the concepts behind the SDI (Strength Deployment Inventory) and the Relationship Awareness Theory are useful but not required.

Overview

This highly interactive course focuses on the value of intentionally designing a culture that improves interpersonal communication, and the importance of collaborative project planning as a vehicle for building teams and delivering value in organizations. Participants will engage in hands-on interactive activity to fully experience the principles of this philosophy.

Everyone can identify the difference between their best and worst collaborative experiences, but most are surprised that this difference has little to do with traditional project management instruction. Here, we bring the human element back into what is critical for collaboration and project success.

By the end of this course, participants will be able to

- differentiate, through reflection and discussion, the key distinctions between their best and their most challenging project experiences
- combine concepts of the Relationship Awareness Theory with personal needs to create an intentional set of norms of behaviour that supports an effective team culture
- collaborate with others to develop a comprehensive project schedule that supports early reconciliation of diverse perspectives
- extend concepts of diversity from the Relationship Awareness Theory to apply to appreciation of diversity in all forms that exist in teams

Applicable for

Anyone involved in collaborative work and the delivery of projects, regardless of their role in the organization.

Content

- introduction: today's team challenges, opportunities to harness creativity and innovation
- intentional team development: taking charge of creating a mature team culture
- changing diversity from a team challenge to a team advantage
- collaboration to deliver value: leveraging the structure of projects to align teams
- collaborative planning exercise: working together as a team to develop project schedules
- building positive feedback into daily team workflow

Seminar Material Format

Paperless materials only.

Seminar Leader

Jim Brosseau

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

SEMINAR MATERIAL PAPERLESS OPTIONAL LAPTOP

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

Applicable for

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.

Seminar Material Format

Paperless materials only.

Seminar Leader

Bruce Acton, FCMC, MBA

Fee $475 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

SEMINAR MATERIAL PAPERLESS OPTIONAL LAPTOP

Thinking Beyond the Box – Part 1

LEVEL Intermediate to Advanced

Prerequisite

None.

Overview

Thinking differently (and more effectively) is the key to success in everything you do. Edward de Bono said we are born with intelligence but we must be taught how to think. Your brain determines how you feel and how you behave. If you don't know how your brain actually works, you will stumble lame to the end of your days. And those who have mastered just one way of thinking, as the result of a specific scholarly discipline or profession (like accounting), are particularly vulnerable to the ambiguities and volatility of incessant change. To advance your agenda, you must change your usual approach to solving problems, the way you look at things and how you ask (and answer) questions. In short, you must get beyond your comfortable "box." (Warning: this experience may change your life.)

Accountants rely primarily on the lens of rational, deductive thinking to solve problems and peer into the future. Unfortunately, this thinking style is no longer up to the demands of modernity. Imagination and intuition are what enable us to anticipate emergent challenges, look around corners and have breakthrough ideas. Is your "box" (or rut) the prison that constrains you or can it be a platform for greater accomplishments?

Applicable for

Anyone who wants to learn how to think differently, challenge conventional wisdom, reconcile paradoxes, focus on what really matters and create intelligent yet entirely feasible solutions.

Content

- the downside of disciplined (analytical) thinking
- acquiring the power of focus and mindfulness
- basic neurology: cognitive biases and blind spots
- overcoming self-imposed limitations
- developing intuition as a thinking skill
- thinking traps, barriers and constraints
- the purpose and measurement of intelligence
- problem solving: a simpler, better way to do it

Seminar Material Format

Paperless materials only.

Seminar Leader

Dr. Jim Murray

Fee $475 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

For dates, times and venues – see page 27

SEMINAR MATERIAL PAPERLESS | OPTIONAL LAPTOP

Thinking Beyond the Box – Part 2

LEVEL Intermediate to Advanced

Prerequisite

Thinking Beyond the Box – Part 1.

Overview

The sequel to Beyond the Box – Part 1, this seminar provides instruction and guidance on the tools and techniques required to improve your problem solving skills. A recent report in the Harvard Business Review tells us: "The idea that people can simply decide to think differently from the way they have in past is delusional. They need tools that bring a new dimension of insight." These tools force the brain to think in ways that are entirely contrary to one's prior training and, especially, what is called often analytical thought.

To get better results, you have to think differently. This highly interactive workshop provides practical, easily implementable methods for thinking more effectively and more creatively – in both your personal and professional life. Bring your most vexatious problems and difficult challenges with you to test the effectiveness of the tools that will be explained. Why Part 2? An attendee said this: "Part 2 was truly amazing. Right from the start, with 'take three of your problems and let's work with the tools,' I was able to develop solutions to some very serious issues I thought were unsolvable. This provided the breakthrough I needed and the change in my brain was priceless."

Applicable for

Anyone who found Part I enlightening and empowering (or perhaps even a bit troubling) in pursuit of their goals. This is the next step in the process of understanding, utilizing and forcing your brain to "think on all cylinders".

Content

- review of the key creative problem solving principles
- individual and group thinking tools, techniques and methods
- how to introduce and apply these tools in your workplace
- lifestyle changes required for a healthy brain and a longer life

Seminar Material Format

Paperless materials only.

Seminar Leader

Dr. Jim Murray

Fee $475 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

SEMINAR MATERIAL PAPERLESS | OPTIONAL LAPTOP

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

Applicable for

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 behavior
- 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

Seminar Material Format

Paperless materials only.

Ethics Hours

This seminar is eligible for 4 hours of ethics content.

Seminar Leader

Antoine Bishara, CPA, CA, CFA

Fee $225 | **PD Passport Valid – 1/2 Passport Day** | **4 Eligible CPD Hours**

SEMINAR MATERIAL PAPERLESS   OPTIONAL LAPTOP

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.

Applicable for

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

Seminar Material Format

Paperless materials only.

Ethics Hours

This seminar is eligible for 4 hours of ethics content.

Seminar Leader

Dr. Shawn Ireland, Ph.D.

Fee $225   PD Passport Valid – 1/2 Passport Day   4 Eligible CPD Hours

SEMINAR MATERIAL PAPERLESS   OPTIONAL LAPTOP

Code Decoded: Evolving Professional Ethical Expectations

LEVEL General

Prerequisite

None.

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.

Applicable for

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.

Seminar Material Format

Paperless materials only.

Ethics Hours

This seminar is eligible for 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

Fee $225   PD Passport Valid – 1/2 Passport Day   4 Eligible CPD Hours

For dates, times and venues – see pages 27 and 28

TITLE STATUS: NEW | SEMINAR MATERIAL: PAPERLESS | OPTIONAL: LAPTOP

Ethical Leadership in an Age of AI

LEVEL General

Prerequisite

None.

Overview

CPAs have a leadership role to play in this era of disruptive technology. Advancements in artificial intelligence create strategic opportunities for organizations and raise unique ethical challenges for business leaders. In this session, we'll highlight recent advancements in AI and explore how it can be expected to change our CPA roles. In particular, we'll evaluate the ethical implications when facing challenging AI-related decisions, by framing these decisions in the context of the requirements of the CPA Code of Professional Conduct.

This interactive session will illustrate some of the recent advancements in AI and some of the expectations for the future. We'll review key elements of frameworks being developed by organizations to design trust into the AI environment, and see how the principles in these frameworks relate to our CPA Code of Professional Conduct. Participants will work together to evaluate a variety of scenarios and explore the implications of AI technologies on our role as ethical leaders.

By the end of this course, participants will be able to

- identify the ethics-based issues and challenges related to AI technologies
- analyze how AI provides opportunities to support ethical decision-making in organizations
- evaluate the ethics dimensions of AI decisions and determine appropriate actions using a systematic approach

Applicable for

CPAs in any role and in all levels of organizational decision-making who have an interest in the ethics elements of technology-related decisions.

Content

- the current state of AI and where it is expected to go
- key ethics concerns and challenges for business leaders
- emerging principles and frameworks in ethical AI development
- decision-making in alignment with the CPA Code
- relevant resources within and outside of the CPA profession

Seminar Material Format

Paperless materials only.

Ethics Hours

This seminar is eligible for 4 hours of ethics content.

Seminar Leader

Laura Friedrich, FCPA, FCGA

Fee $225 | **PD Passport Valid – 1/2 Passport Day** | **4 Eligible CPD Hours**

SEMINAR MATERIAL: PAPERLESS | OPTIONAL: LAPTOP

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. CPA Codes across the country except the Quebec Code are covered in this course.

Applicable for

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

Seminar Material Format

Paperless materials free of charge. Print option available for $20.

Ethics Hours

This seminar is eligible for 4 hours of ethics content.

Seminar Leader to be drawn from

Laura Friedrich, FCPA, FCGA
Roger Merkosky, CPA, CA
Wendy Royle, CPA, CA

Fee $225 | **PD Passport Valid – 1/2 Passport Day** | **4 Eligible CPD Hours**

SEMINAR MATERIAL: PAPERLESS — OPTIONAL: LAPTOP

Gateway to Membership: Welcome to the Pros

(formerly The Essence of Professionalism: Ethics, Rules and Standards)

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.

Applicable for
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 Material Format
Paperless materials only.

Ethics Hours
This seminar is eligible for 7 hours of ethics content.

Special Notes
Please bring a current copy of the CPABC Code of Professional Conduct (hardcopy or electronic) as it will be referred to throughout.

Seminar Leader
Laura Friedrich, FCPA, FCGA

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

SEMINAR MATERIAL: PAPERLESS — OPTIONAL: LAPTOP

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.

Applicable for
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

Seminar Material Format
Paperless materials only.

Ethics Hours
This seminar is eligible for 4 hours of ethics content.

Seminar Leader
Antoine Bishara, CPA, CA, CFA

Fee $225 | **PD Passport Valid – 1/2 Passport Day** | **4 Eligible CPD Hours**

For dates, times and venues – see pages 27 and 28

SEMINAR MATERIAL: PAPERLESS | OPTIONAL: LAPTOP

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.

Applicable for

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

Seminar Material Format

Paperless materials only.

Ethics Hours

This seminar is eligible for 4 hours of ethics content.

Seminar Leader

Tammy Towill, FCPA, FCMA

Fee $225 | **PD Passport Valid – 1/2 Passport Day** | **4 Eligible CPD Hours**

SEMINAR MATERIAL: PAPERLESS | OPTIONAL: LAPTOP | OPTIONAL: CALENDAR / DAYTIMER

Balancing Your Wheels

LEVEL General

Prerequisite

None.

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?

Applicable for

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

Seminar Material Format

Paperless materials only.

Special Notes

To get the most out of this seminar, please bring your calendar or day-timer with you.

Seminar Leader

Lesley-Ann Marriott, CEC, PCC

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

SEMINAR MATERIAL PAPERLESS OPTIONAL LAPTOP

Becoming...what you *really* want to be

LEVEL Intermediate

Prerequisite

None.

Overview

What kind of life do you seek for yourself? Do you know what you want to do but aren't sure how to do it? If you could, would you change your career trajectory? Have you discovered your life's purpose, achieved your potential, arrived at the professional plateau to which you aspire? Have you reached a "mid-point" but don't know what the rest of your career or life will offer? If yes, then NOW is the time to figure it out. When you ignore the questioning voice within, you become 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? If, despite your many 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 with you in mind. It provides the principles and practicalities of becoming extraordinary.

Applicable for

Individuals looking for a roadmap for changing their lives … and those who genuinely believe they can.

Content

Discover how to

- achieve your full potential in life
- know what it will take (a realistic self-assessment)
- map the best route to reach your desired destination
- align your key priorities with your time, energy and effort
- articulate your non-negotiable rules for living
- connect with key influencers and get good advice
- promote, impress, sell and build your brand
- move from "just average" to extraordinary
- find and strengthen the drive to succeed
- live a life of purpose: choices you need to make

Seminar Material Format

Paperless materials only.

Seminar Leader

Dr. Jim Murray

Fee $475 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

SEMINAR MATERIAL PAPERLESS OPTIONAL LAPTOP

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.

Applicable for

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

Seminar Material Format

Paperless materials only.

Seminar Leader

Terry Small, B.Ed., MA

Fee $225 **PD Passport Valid – 1/2 Passport Day** **3.5 Eligible CPD Hours**

For dates, times and venues – see pages 28 and 29

SEMINAR MATERIAL
HARD COPY

Break Free of the Box: Creative Solutions to Workplace Challenges

LEVEL Introductory to Intermediate

Prerequisite

None.

Overview

So often we hear that the solution to workplace challenges is to "think outside the box!" But how do we do it? In this engaging and interactive session, you'll discover and develop your own creative intelligence. You'll leave with the tools to help you make the most of opportunities and challenges you encounter in your professional and personal life.

Whatever your challenges – from resolving issues with difficult clients, improving your ability to problem solve, or finding ways to encourage collaboration between staff or between organizations – developing creativity is critical to success for today's changing and volatile workplaces.

Applicable for

Anyone who may have been told to lighten up, get creative or innovative, or think outside the box. And those who may be feeling stuck in their career.

Content

This course utilizes instructor presentation, reflection, small and large group discussion, video clips, and experiential activities to explore the following topics

- what encourages and blocks creativity
- organizational examples of creativity
- 5 competencies of creative intelligence
- how risk taking, playng and making prototypes helps to release creative potential
- creative problem solving techniques
- how to put ideas into action

Seminar Material Format

Print copy only, no paperless option.

Seminar Leader

Dave Whittington, Ph.D.

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

SEMINAR MATERIAL
PAPERLESS

OPTIONAL
LAPTOP

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.

Applicable for

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.

Seminar Material Format

Paperless materials only.

Seminar Leader

Dr. Shawn Ireland, Ph.D.

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

SEMINAR MATERIAL PAPERLESS · OPTIONAL LAPTOP

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.

Applicable for
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

Seminar Material Format
Paperless materials only.

Seminar Leader
Dr. Shawn Ireland, Ph.D.

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

TITLE STATUS NEW · SEMINAR MATERIAL PAPERLESS · OPTIONAL LAPTOP

Emotional Intelligence in the Workplace

LEVEL General

Prerequisite
None.

Overview
Emotional intelligence (EI) is the capacity to be aware of, in control of, and express one's emotions in a way that preserves interpersonal relationships both judiciously and empathetically. Participants will develop an understanding of what EI is, develop self awareness and self-regulation in themselves, and positively develop those skills in others through empathetic listening and shared understandings.

By attending this seminar, participants will

- learn to identify communications styles and understand their impact (using DiSC behavioural tool)
- acquire tools for understanding of emotional intelligence
- develop a personal self-awareness of their current emotional intelligence skills
- build an awareness of others
- learn how to participate in raising organizational EI

Applicable for
Anyone who wants to learn what EI is, develop an awareness of their current EI skills and positively develop those skills in others. It will be of interest to those who want to understand the role of empathetic listening, and integrate that knowledge into their interactions with others

Content
- why Emotional Intelligence matters
- Emotional Intelligence at work
- cultivating Emotional Intelligence
- getting to know yourself
- understanding feelings
- perceiving yourself accurately
- cultivating confidence and self-esteem
- exercising emotional self-control
- working with your triggers
- getting to know others
- developing empathy
- anticipating needs
- cultivating social awareness
- communicating effectively using DiSC behavioural tool
- developing others
- helping your organization develop EI

Seminar Material Format
Paperless materials only.

Seminar Leader
Casey Miller

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

For dates, times and venues – see pages 28 and 29

SEMINAR MATERIAL PAPERLESS | OPTIONAL LAPTOP

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.

Applicable for

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 behavior
- 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

Seminar Material Format

Paperless materials only.

Seminar Leader

Dr. Shawn Ireland, Ph.D.

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

SEMINAR MATERIAL PAPERLESS | OPTIONAL LAPTOP

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.

Applicable for

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
- how to foster appreciative inquiry
- how to capture knowledge and be introduced to "deep smarts" techniques
- how to action plan with the use of interpersonal and self-assessment tools to implement fresh perspectives

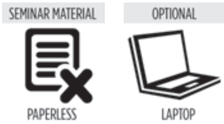
Seminar Material Format

Paperless materials only.

Seminar Leader

Dr. Shawn Ireland, Ph.D.

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**



Play With Your Mind: Growth Mindset

LEVEL General

Prerequisite
None.

Overview
If you have ever said or heard the phrase, “You can’t teach an old dog new tricks” you have just stumbled on to self imposed limitations called a fixed mindset. What we need in our workplaces today are people who continue learning, don’t abdicate their thinking, resist perfectionism, are incessantly curious, willing to speak up, take risks, make mistakes and ruthlessly mine those experiences for learning. They don’t wait for feedback, they expect it and ask for it. In short they have a growth mindset and love to learn!

Through ongoing learning conversations, open and incisive questions, challenge and accountability with an equal measure of encouragement and support, teams get better at changing quickly, evolving and making better decisions. Trust increases. It’s the kind of culture people want to be part of and work hard in. A growth mindset is key to a flourishing organization that thrives in the most chaotic and uncertain times.

Applicable for
Leaders who want to learn about how to have a growth mindset in order increase engagement, inspire their team and improve results.

Content
- what is growth mindset & fixed mindset - personal assessment
- you build and support a learning organization
- get your ego out of it … it’s blocking your potential
- the difference between excellence and perfectionism
- humour matters - dead seriousness vs lightheartedness … fear shuts everything down
- how to build a culture in which it is okay to make mistakes and unacceptable not to learn from them
- importance of psychological safety, humility and vulnerability
- how to find the right balance of challenge and accountability & support and encouragement
- daily curious conversations and the power of questions
- why feedback doesn’t work
- what makes giving and receiving feedback hard
- three triggers that block feedback
- three P’s that destroy confidence after receiving feedback
- stop giving feedback and start asking for feedback
- 5 questions to ask to get better feedback
- how to have a feedback conversation
- ways to align and express yourself without losing power
- what it takes to speak up and have a voice
- how to build confidence through learning
- 30 plus takeaways for developing a growth mindset

Seminar Material Format
Paperless materials only.

Seminar Leader
Tammy Robertson, MA

Fee $450 **PD Passport Valid – 1 Passport Day** **7 Eligible 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.

Applicable for
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

Seminar Material Format
Print copy only, no paperless option.

Seminar Leader
Rhonda Caldwell

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

For dates, times and venues – see pages 28 and 29

SEMINAR MATERIAL PAPERLESS · OPTIONAL LAPTOP

The Four Intelligences

LEVEL Introductory

Prerequisite

None.

Overview

Rarely is true and lasting change ever created by one person. A true change-maker is one that can inspire and motivate those around them and that becomes the ultimate catalyst for change. In order to inspire and motivate we must first understand what drives different people and how best we can activate those drivers. We will explore the four intelligences – intellectual, emotional, physical and spiritual – as we consider the core drivers to inspire and motivate in an environment of change.

Applicable for

Anyone faced with needing to inspire and motivate change in others and in organizations.

Content

Using Stephen Covey's 4 Intelligences as a base - intellectual, emotional, physical and spiritual, this session will explore tools, techniques and strategies to effectively navigate change, and examine the challenges and opportunities in leading through change.

Seminar Material Format

Paperless materials only.

Seminar Leader

Tammy Towill, FCPA, FCMA

Fee $225 **PD Passport Valid – 1/2 Passport Day** **3.5 Eligible CPD Hours**

SEMINAR MATERIAL PAPERLESS · OPTIONAL LAPTOP

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.

Applicable for

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

Seminar Material Format

Paperless materials only.

Seminar Leader

Greg Campeau, B.Comm.

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

SEMINAR MATERIAL
HARD COPY

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!

Applicable for

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

Seminar Material Format

Print copy only, no paperless option.

Seminar Leader

Terry Small, B.Ed., MA

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

SEMINAR MATERIAL — OPTIONAL
PAPERLESS — LAPTOP

What is Your Happiness Practice? It's Time to Ditch the Stress and Find Real Happiness

LEVEL General

Prerequisite

None.

Overview

The happiness model is broken. The good news is the new model is better. Recent discoveries in the field of positive psychology have shown that the commonly held idea that success brings happiness is actually backward: Happiness fuels success not the other way around. So, if your mood needs some elevating, this course outlines the simplest formula for a happy life. Believe it or not, you can still get to your "Happy Place."

This course is a comprehensive buffet of practical ideas, suggestions and tools to guide you to a more content, grateful and appreciative way of living. And it will show you how to get more of the satisfaction you are craving.

Applicable for

Anyone wishing to assess and increase their happiness level.

Content

In this session, you will learn

- the brain on happiness … the science of why feeling good leads to success
- the dream we all have that is completely wrong
- how enthusiasm saves lives: know what makes you happy
- assessing and measuring your happiness
- the myths of happiness … how to want nothing, do anything and have everything
- questions to help you shift perspective and feel better
- words that matter: change the way you tell your story
- ten ways to be more grateful
- the power of relationships: easy ways to amp up connection and appreciation
- 15 ways to become a positive force
- how to overcome the joy crushers (deal with negative people)
- the surprise of lists … a joy list, first time list and a bucket list
- three keys to a happy day (contentment, calmness and connection)
- feeding off the energy of laughter: say yes, and look for the fun!
- living above the line: hold yourself accountable to being happy

Seminar Material Format

Paperless materials only.

Seminar Leader

Tammy Robertson, MA

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

 For dates, times and venues – see page 29

SEMINAR MATERIAL
HARD COPY

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.

Applicable for

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 Material Format

Print copy only, no paperless option.

Seminar Leader

Tyler Wier

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

SEMINAR MATERIAL
PAPERLESS

OPTIONAL
LAPTOP

Bridging the Generational Divide

LEVEL Intermediate

Prerequisite

None.

Overview

Never before have we had such diversity in the workplace in terms of different generations that have completely different expectations, abilities and behaviours. Baby Boomers and Generation X are completely perplexed by the 'attitudes' the Millennials bring to the office. Millennials just want to work for an organization that appreciates their skills and gives them a meaningful purpose. Oh, and right around the corner is Generation Z, and they have a whole new set of rules that they want leaders to pay attention to!

In this fun, engaging and enlightening session we will take you through how to understand what each generation brings to the table and how, as a leader, you can engage the hearts and minds of your entire four-generation team. We'll also explore if harmony at work is possible and if employee loyalty is dead.

Applicable for

Leaders wanting to understand how to get the most in terms of engagement, cultural harmony, customer satisfaction and results from their entire team.

Content

In this session, you will learn

- key differences in the generations that make up your workforce
- the unique skills that each generation brings to the table as a result of the environment they were nurtured in
- how to identify your leadership response for each individual on your team for maximum engagement
- how to build an 'Epic Culture' through values and purpose alignment

Seminar Material Format

Paperless materials only.

Seminar Leader

Robert Murray

Fee $225 | **PD Passport Valid – 1/2 Passport Day** | **3.5 Eligible CPD Hours**

SEMINAR MATERIAL PAPERLESS
OPTIONAL LAPTOP

Building High Performance Teams

LEVEL Introductory to Intermediate

Prerequisite

None.

Overview

Companies live or die on the quality of their managers. The science of management offers profound and compelling new insights on how to build great teams but the actual practice of management hasn't budged in 30 years. Worldwide, only 16% of employees are fully engaged, the rest are "just coming to work." Every business leader knows employees represent their biggest expense and best opportunity for achieving competitive advantage. Yet research tells us today's workforce is inefficient, stressed out, apathetic, distrustful and entitled. If these symptoms don't characterize your workplace, you're either lucky, complacent or not paying attention.

Applicable for

Anyone who wants to nurture productivity, motivate employees, encourage two-way feedback and genuinely excite those who ultimately determine your fate.

Content

Learn how to

- build and manage a high performance team
- diagnose and remedy your team's productivity, accomplish more in less time, become stress and dispute free, and "turn on" a new generation of knowledge workers
- answer the critical questions that lead to high performance
- turn on and engage efficiency and loyalty in your workforce
- give and get the feedback that nurtures accountability
- design employee surveys and exit interviews that actually inform
- deal with annoying, dysfunctional and toxic co-worker behavior
- become stress and dispute-free (the process and the tool)
- motivate and reconcile the needs of different generations
- get people to work smart rather than (burn-out) hard
- enable managers to lead a high performance team

Seminar Material Format

Paperless materials only.

Seminar Leader

Dr. Jim Murray

Fee $475 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

SEMINAR MATERIAL PAPERLESS
OPTIONAL LAPTOP

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

Applicable for

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 to help people make sustainable changes
- 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

Seminar Material Format

Paperless materials only.

Seminar Leader

Lesley-Ann Marriott, CEC, PCC

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

For dates, times and venues – see page 29

SEMINAR MATERIAL — PAPERLESS

OPTIONAL — LAPTOP

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.

Applicable for

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 Material Format

Paperless materials only.

Seminar Leader

Tammy Towill, FCPA, FCMA

Fee $225 **PD Passport Valid – 1/2 Passport Day** **3.5 Eligible CPD Hours**

SEMINAR MATERIAL — PAPERLESS

OPTIONAL — LAPTOP

Doing Business as Unusual

(formerly Stop the Insanity! Radical Ideas for Unpredictable Times)

LEVEL Introductory to Intermediate

Prerequisite

None.

Overview

There are two types of enterprises in the world today – those that get better and those that go out of business. This cutting-edge, counter-intuitive course will enable you to start important conversations about how to how to fix failing or broken business practices by embracing ideas that run contrary to everything you’ve ever been taught about how to manage people and survive in a volatile, unpredictable world. Current techniques and tools, designed for much simpler times, can’t cope with the uncertainty, complexity, instability and disruption of today. Einstein said insanity is doing the same thing while expecting different results. Does that define how you currently lead or manage? Isn’t it time you questioned why your strategy doesn’t work, why budgeting is a futile exercise, why your culture breeds entitlement rather than accountability (among other unproductive assumptions)?

Applicable for

Those who realize their outdated approaches, warmed-over theories and same-old tools are not producing the results they seek.

Content

In this fast-paced, highly practical course, discover

- what ultimately constrains organizations today
- what dictates success in an unpredictable world order
- why budgeting is delusional: better ways to control expenses
- old vs. new management models: realities that matter now
- the disconnect between what you pay for and what you get
- rethinking traditional corporate functions & strategic priorities
- replacing managers with accountable self-directed teams
- why strategic planning is pointless and how to fix it
- building a culture of resilience and innovation
- changing your game: how to create a future of choice

Seminar Material Format

Paperless materials only.

Seminar Leader

Dr. Jim Murray

Fee $475 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

SEMINAR MATERIAL PAPERLESS OPTIONAL LAPTOP

Dynamic Leadership: Adjusting Your Leadership Style to the Situation

(formerly Situational Leadership 2.0)

LEVEL Intermediate to Advanced

Prerequisite

A few years of managerial and/or supervisory experience will be beneficial.

Overview

No single leadership style or approach can fit all situations. This highly interactive, action-planning workshop will help you expand your range and flexibility as a leader and coach; give employees the direction and support they need in each situation; and drive both employee performance and development. This program takes you well beyond the classic 4-box situational leadership model, making leadership more flexible, more effective, and easier to apply. It will help you understand both employee needs and leadership practices in their proper context, namely, the employee's motivation and readiness for the work at hand, the business context, and your unique strengths as a leader. Abraham Maslow wrote: "To a hammer, every problem looks like a nail." Don't just be a hammer. Expand your range and flexibility as a leader by adjusting your leadership style to the situation at hand.

Applicable for

Leaders at all levels who want to take their day-to-day supervision, coaching, delegation, empowerment, and leadership practices up to the next level.

Content

In the session, you will learn how to

- give employees the direction and support they needed in each situation
- help your employees improve their job performance
- help your employees develop new skills more efficiently and effectively
- speed the cycle of learning on your team
- use employee engagement strategies to enhance buy-in, accountability and initiative
- get more out of your delegation and empowering practices
- learning how to drive continuous improvement in performance and learning
- expand your range and flexibility as a leader

Seminar Material Format

Paperless materials only.

Seminar Leader

Joel Shapiro, Ph.D.

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

SEMINAR MATERIAL PAPERLESS OPTIONAL LAPTOP

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.

Applicable for

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 Material Format

Paperless materials only.

Seminar Leader

Greg Campeau, B.Comm

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

For dates, times and venues – see page 29

SEMINAR MATERIAL PAPERLESS
OPTIONAL LAPTOP

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.

Applicable for

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

Seminar Material Format

Paperless materials only.

Seminar Leader

Dr. Shawn Ireland, Ph.D.

Fee $450 PD Passport Valid - 1 Passport Day
7 Eligible CPD Hours

TITLE STATUS NEW
SEMINAR MATERIAL PAPERLESS
OPTIONAL LAPTOP

Enhancing Your Management Skills

LEVEL General

Prerequisite

None.

Overview

This half day workshop is designed to build leadership and people skills for those who are looking to move into management roles, new managers, or experienced managers looking to lead more effectively.

Very few organizations provide management skill training for employees when they are promoted. There are many concepts and skills that come together in building great managers, but it all comes down to attitudes, actions and behaviours. The more we understand about people – including ourselves - the better we can be in unlocking the potential of others in the workplace.

By the end of this course, participants will be able to

- understand the nature of motivation in the workplace
- determine what their natural leadership style is
- unpack and prevent micromanagement
- build skills that develop engagement vs resistance in the workplace

Applicable for

Professionals who are looking to begin a career in management or existing managers who wish to improve their skills.

Content

- preventing micromanagement
- leadership styles
- creating open environments
- motivation in the workplace
- creating employee engagement
- personality types

Seminar Material Format

Paperless materials only.

Seminar Leader

Carson McKee

Fee $225 PD Passport Valid – 1/2 Passport Day 3.5 Eligible CPD Hours

SEMINAR MATERIAL
HARD COPY

Enhancing Your Leadership Impact

LEVEL Introductory to Intermediate

Prerequisite

None.

Overview

In their quest to be effective leaders, managers often try to emulate other leaders who have had an impact on them. While this can be helpful, discovering your own style leads to a more authentic engagement with others in the workplace and builds on your strengths to maximize your impact.

This highly interactive and engaging course will help you identify and enhance your leadership impact through completion of the Myers-Briggs Type Indicator (MBTI). Participants will receive an 18 page customized report on which to base the exploration and identification of how they can enhance their leadership impact, while remaining true to themselves and their own style.

Applicable for

Professionals currently in a management position or moving into one that involves leading and supervising others.

Content

This course utilizes instructor presentation, reflection, small and large group discussion, video clips, and experiential activities to explore the following topics

- characteristics of authentic leaders
- interpretation of the MBTI – identify where you direct your energy, how you take in information and how you make decisions
- apply the MBTI insights to communication and leadership style, enabling you to leverage your strengths and influence others

Seminar Material Format

Print copy only, no paperless option.

Seminar Leader

Tammy Dewar, Ph.D.

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

SEMINAR MATERIAL
PAPERLESS

OPTIONAL
LAPTOP

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.

Applicable for

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

Seminar Material Format

Paperless materials only.

Seminar Leader

Lesley-Ann Marriott, CEC, PCC

Fee $225 **PD Passport Valid – 1/2 Passport Day** **3.5 Eligible CPD Hours**

For dates, times and venues – see page 29

SEMINAR MATERIAL

HARD COPY

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.

Applicable for

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

Seminar Material Format

Print copy only, no paperless option.

Seminar Leader

Nic Tsangarakis

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

TITLE STATUS SEMINAR MATERIAL OPTIONAL

NEW PAPERLESS LAPTOP

Leaders as Role Models

LEVEL Intermediate

Prerequisite

Supervisory experience is expected.

Overview

Are you a genuine leader or more of a technical manager amongst other employees? Learn the mindset shift that will take you from an overseer of business processes to someone who inspires your team to achieve great things. Learn how you can earn the loyalty and commitment from your team members with 21st century leadership tools. Transformative organizational change is possible when bosses are coaches who lead with emotional intelligence and profound personal integrity. This workshop is life-changing, interactive, and filled with fun content including Hollywood film clips.

The workshop de-emphasizes the job-specific skills leaders individually know and instead asks participants who they are. Drawing on Organization Development science, it shows how those who influence the behavior of staff become genuine role models—seeing the big picture, articulating direction, and embracing their team in a collaborative and committed mission. Traditional employee engagement programs often buy the loyalty of employees' bodies, but do not win their hearts and minds. This workshop teaches direct interventions that change the way employees FEEL about their work. Leverage positive psychology to bring creativity, productivity and joy into your workplace!

Applicable for

All leaders – from CEOs to front-line supervisors and HR professionals, and businesses wanting higher employee engagement.

Content

In this session, you will learn

- Thomas Crane's leadership model
- shaping vision
- facilitating collaborative work
- coaching performance
- service to self-motivated employees
- dealing powerfully with performance deficits and poor attitudes

Seminar Material Format

Paperless materials only.

Seminar Leader

Paul Krismer

Fee $225 **PD Passport Valid – 1/2 Passport Day** **3.5 Eligible CPD Hours**

SEMINAR MATERIAL PAPERLESS · OPTIONAL LAPTOP

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.

Applicable for

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

Seminar Material Format

Paperless materials only.

Seminar Leader

Dr. Shawn Ireland, Ph.D.

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

SEMINAR MATERIAL PAPERLESS · OPTIONAL LAPTOP

Leadership in a Changing World

LEVEL Intermediate

Prerequisite

None.

Overview

Research shows us that the majority of changes attempted within an organization fail. In order to succeed, a strong 'leading change' approach is essential for any leader. It is important that leaders develop specific skills that enable them to lead their teams in the midst of all their organization's change and uncertainty.

In this engaging course, participants will learn about the shifting nature of leadership, and the role of leadership in today's changing organizations. Specific models and approaches to leadership, particularly during times of change, will be explored.

Applicable for

Leaders at any hierarchical level and in particular, leaders and managers from organizations going through periods of change.

Content

In this session, you will learn

- an overview of leadership theory and practice
- about change and the nature of accelerating organizational change
- about the cycles of change and specific models and strategies for leadership to effectively navigate change

The course will include exercises that illustrate the concepts being addressed.

Seminar Material Format

Paperless materials only.

Seminar Leader

Guy Nasmyth, Ph.D.

Fee $450 **PD Passport Valid – 1 Passport Day** **7 Eligible CPD Hours**

For dates, times and venues – see page 29

SEMINAR MATERIAL PAPERLESS OPTIONAL LAPTOP

Leading Sustainable Change: Make it Happen

LEVEL Intermediate to Advanced

Prerequisite

None.

Overview

Given the pace of change today, leading change has become a core leadership competency. All managers today must know how to drive positive change and make it stick. What makes this learning module so powerful and effective is that rather than saddling you with a single approach to change management, we show you how to leverage several different approaches. As Abraham Maslow said: "To a hammer, every problem looks like a nail." Knowing how to match the change management approach to the situation at hand will help you become far more flexible and consistent as a change leader. Moreover, the competencies necessary for leading change are also crucial for project management and execution of strategy. This well-rounded action planning workshop combines leading edge ideas, skills, and tools you can use to enhance your leadership effectiveness.

Applicable for

Professionals who drive and implement change, and who lead employees who are expected to contribute to change management efforts.

Content

In this session, you will learn

- how to understand different change methodologies and your role in them
- how to identify a change approach suited to your unique situation
- the nine key success factors of sustainable change: "the nine conversations"
- how to develop new skills: savvy change tactics for building and sustaining momentum

Seminar Material Format

Paperless materials only.

Seminar Leader

Joel Shapiro, Ph.D.

Fee $225 **PD Passport Valid – 1/2 Passport Day** **3.5 Eligible CPD Hours**

SEMINAR MATERIAL PAPERLESS OPTIONAL LAPTOP

Make Change Stick: Getting Results by Changing the Inner Game

LEVEL Introductory to Intermediate

Prerequisite

Previous attendance at *Essence of Leadership* would be 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.

Applicable for

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 Material Format

Paperless materials only.

Seminar Leader

Alex Wray

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

SEMINAR MATERIAL PAPERLESS | OPTIONAL LAPTOP

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.

Applicable for

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

Seminar Material Format

Paperless materials only.

Seminar Leader

Helen Wale, MA, CPHR, CEC

Fee $450 PD Passport Valid - 1 Passport Day 7 Eligible CPD Hours

SEMINAR MATERIAL PAPERLESS | OPTIONAL LAPTOP

Managing Transitions: Leading the People Side of Change

LEVEL Intermediate to Advanced

Prerequisite

None.

Overview

When you think about how difficult it is to change yourself, you realize how difficult it is to change someone else, not to mention making changes across a whole team or organization. Understanding how change affects people is one of the most important factors in successfully implementing changes of all sizes. The fact that we undergo so much change, that we are expected to drive change, and that change can be so stressful and messy, makes "managing transitions" a crucial work and life skill.

This workshop will furnish you with dozens of practical techniques and tools to help yourself and others prepare for, deal, with, and make the most of change. Just imagine: if you can implement change more effectively, if you can help your employees better deal with ongoing change, or if you can help your clients better understand and accept the changes you are implementing in their space, you are going to make your life a lot easier, save a lot of time and money, and enhance your competitive edge.

Applicable for

Professionals who are leading change projects and being affected by business and industry changes.

Content

In this session, you will learn how to

- understand the psychological and emotional impact of change
- help yourself and others prepare for, deal with, and make the most of change
- understand change fatigue: taking care of yourself and others during rapid and constant change
- progress from resistance to change; strategies for dealing with employee resistance
- use transition management principles to improve customer service

Seminar Material Format

Paperless materials only.

Seminar Leader

Joel Shapiro, Ph.D.

Fee $225 PD Passport Valid – 1/2 Passport Day 3.5 Eligible CPD Hours

For dates, times and venues – see page 29

SEMINAR MATERIAL PAPERLESS OPTIONAL LAPTOP

Seven Steps to Successful Virtual Teamwork

LEVEL Introductory to Intermediate

Prerequisite

None.

Overview

Technology and globalization, together with the increasing emphasis on work/life balance issues, has encouraged the growth of virtual, remote and dispersed teamwork. Team members may work from home, in dispersed offices, in different countries and continents. This is creating challenges to the ways we work and communicate and has propelled the issue to the forefront of managers' priorities. Organizations often lack consistent guidance on "best practice" for justifying, organizing, supporting and evaluating the work of virtual teams.

Applicable for

Anyone interested in learning best practices to foster successful teamwork in virtual environments or dispersed work locations.

Content

In this workshop, participants will learn how to

- apply the seven steps, and integrate into their use their knowledge of virtual team success.
- develop cross-cultural and cross generational awareness to improve virtual team performance
- identify barriers to virtual team performance, assess and diagnose their virtual teams' ability to deliver
- foster the behaviours of high-performing virtual teams
- use technologies and media to coordinate and facilitate accomplishment of tasks, selecting the appropriate technology to support collaborative teamwork

Seminar Material Format

Paperless materials only.

Seminar Leader

Dr. Shawn Ireland, Ph.D.

Fee $450 | **PD Passport Valid – 1 Passport Day** | **7 Eligible CPD Hours**

SEMINAR MATERIAL PAPERLESS OPTIONAL LAPTOP

Systems Thinking & Resolving Complex Issues in Complex Environments

LEVEL Advanced

Prerequisite

None.

Overview

In an increasingly complex world, we continue to try to apply reductionist thinking to resolve systemic problems. In a reality characterized by interconnectedness and interdependency, this approach is no longer adequate. This course is designed to enhancticipants' understanding and awareness of systems theory and present tools and strategies to effectively address systemic issues in organizations.

In this course, participants will learn to recognize complexities in organizational systems and to identify points of leverage to bring about positive change. Specific models will be presented and explored to develop a level of familiarity with the discipline of systems thinking.

Applicable for

Those in decision-making positions, whether at the top of the organizational hierarchy or in the middle, who could benefit from an enhanced ability to address complex issues. As this course focuses on effective leadership practices, it is relevant to anyone in any position involving organizational leadership at any level.

Content

In this session, you will learn

- an overview of organizational systems theory and complexity in organizations
- what feedback loops are and how to identify points of leverage to bring about positive change
- about polarity management as an alternative to implementing symptomatic solutions to complex problems
- how to reframe organizational issues to ensure they are being adequately addressed

Seminar Material Format

Paperless materials only.

Seminar Leader

Guy Nasmyth, Ph.D.

Fee $450 | **PD Passport Valid – 1 Passport Day** | **7 Eligible 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.

Applicable for

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

Seminar Material Format

Paperless materials only.

Seminar Leader

Terry Small, B.Ed., MA

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

Did you know...

CPABC Tax Courses Accredited by the Law Society of BC

Practicing BC lawyers can earn CPD credits by attending tax seminars offered through CPABC PD.

Early Registration & Waitlists

Early registration ensures your space in popular seminars, and will also prevent seminars with lower enrolment from being cancelled. Maximum class sizes vary, and will depend on the type of seminar as well as delivery format. Although we try to accommodate as many registrations 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, the majority of attendees arrive in business casual attire. Meeting room temperatures can fluctuate throughout the day, so 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 attendees minimize the use of fragrances as a courtesy to everyone sharing the same learning space.

Lunch and Coffee Service

Lunch is provided only at full-day seminars. Breakfast pastries are provided in the morning (except at free events). Coffee service is provided at all seminars.

Special Dietary Requirements

We will do our best to accommodate attendees who have food allergies, as well as vegetarian or vegan requests, but personal preferences – such as a preference for one type of protein over another – will not be accommodated. Please inform us of your dietary restriction at the time of registration.

For dates, times and venues – see page 29

Public Practice Management

NOTABLE FORMAT
ONLINE

Considering Starting a CPA Practice

Prerequisite
None.

Overview
This on-demand 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.

Applicable for
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.

Content
- personal assessment: identify personal strength and areas for development, including
  - communication
  - self-confidence
  - entrepreneurial nature
  - ability to convey information
- technical competency self-assessment
  - tax experience (T1,T2 and other tax filings)
  - financial reporting (assurance) experience (bookkeeping, NTR, Review, Audit)
  - familiarity with provincial acts/bylaws/code of practice related to public accounting
- business planning
  - 3+ year budget and common revenue/expense items (setting rates/ upfront capital costs)
  - marketing/branding plan
  - approaches to starting a public practice (purchase vs. build client base)
- licensing and regulatory requirements
- summary of resources available (both free and subscription based), including CPA Canada toolkit, provincial websites, books and related material

Availability
This online session is available on-demand – register at pd.bccpa.ca. The session is eligible for 2 CPD hours upon successful completion of a quiz.

SEMINAR MATERIAL
PAPERLESS
OPTIONAL
LAPTOP

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.

Applicable for
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

Seminar Material Format
Paperless materials free of charge. Print option available for $20.

Seminar Leader
Greg Buck, CPA, CA, B.Comm

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

PD Nexus: Public Practice Insights

A conference day for public practice members focusing on practice management and improving profitability.

See page 154 for details

Strategy, Governance, Risk & Human Resource

Strategic Management Certificate Program

Advanced Strategic Management Certificate Program

SEMINAR MATERIAL PAPERLESS

OPTIONAL LAPTOP

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.

Applicable for
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

Seminar Material Format
Paperless materials only.

Seminar Leader
Bruce Acton, FCMC, MBA

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

For dates, times and venues – see page 30

SEMINAR MATERIAL: PAPERLESS | OPTIONAL: LAPTOP

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.

Applicable for

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

Seminar Material Format

Paperless materials only.

Seminar Leader

Gavin Marshall, BA (Hons), LL.B.

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

SEMINAR MATERIAL: PAPERLESS | OPTIONAL: LAPTOP | NOTABLE FORMAT: ONLINE

Handling Termination of Employment

LEVEL Intermediate

Prerequisite

None.

Overview

This session will provide an overview of issues surrounding the termination of employment, and will include any recent updates in the area. Participants will receive a comprehensive summary of employer termination liabilities, become more aware of all the issues relating to termination of employment and learn a practical framework for planning.

Applicable for

Anyone involved in human resources, or managers responsible for termination of employment.

Content

- when can you fire an employee?
  - dishonesty and other forms of misconduct
  - how serious does it have to be?
  - when are warnings necessary?
  - poor performance – the progressive discipline model
- how much severance do you have to pay?
  - employment standards minimums
  - reasonable notice
  - employment contracts
  - bonuses and benefits
- structuring the severance package
  - the employee's duty to look for another job
  - lump sum vs. salary continuation
- special cases
  - sanctions for "Bad Faith" ehavior by employers during the termination process
  - sick or disabled employees
  - employees who have been "enticed" from secure employment
  - pregnant employees
  - avoiding human rights violations

Seminar Material Format

Paperless materials only.

Seminar Leader

Geoffrey Howard, LL.B.

Fee $130 | **PD Passport Valid – 1/3 Passport Day** | **2 Eligible CPD Hours**

Advisory: There will be audio recording at the Dec 10 session.

TITLE STATUS: NEW | SEMINAR MATERIAL: PAPERLESS | OPTIONAL: LAPTOP

NFPO - Governance

LEVEL Introductory

Prerequisite

It would be useful but not necessary for the participant to have some experience as a board member or has worked with boards.

Overview

Not-for-profit organizations (NFPOs) are diverse and their expectations of directors and good governance can vary widely. This half-day session explores some of the unique governance challenges facing NFPOs with a view to incorporate best practice and identify emerging issues in order to provide effective oversight.

Course Description

Since the days of Enron in 2002, governance has been subject to attention and regulation in the for-profit sector. However, NFPOs have not garnered that same attention. Yet, it has been proven that effective governance leads to improved results. For NFPOs with limited resources, it becomes even more important to ensure their governance practices are effective and they use their volunteer board resources wisely. Through discussion and exercises, we will work through the key elements of a corporate governance framework and determine how to bring in certain elements of discipline that are seen on corporate boards to benefit the NFPO.

Applicable for

This session will be of benefit to those who are on NFPO boards, those considering joining an NFPO board, and any who interact or provide support to NFPO boards as it will help current and future board members determine how to manage through certain expectations, especially in light of the volunteer status they are likely to have.

Content

- what is governance?
  - the essential elements of a corporate governance system
  - understanding the governance value proposition
- the control environment
  - the role of the board of directors and the audit committee and the importance of self-evaluation
  - the role of management in promoting 'tone at the top'
- the importance of an ethical culture
  - understanding the subset of ethics within an organization
  - tools for evaluating the ethical culture of an organization
- current trends and emerging issues
  - current trends and their impacts on board composition and reporting
  - identifying emerging issues and how to handle them

Ethics Content

This seminar is eligible for 0.75 hours of ethics content.

Seminar Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leader

Roger Merkosky, CPA, CA

Fee $225 | **PD Passport Valid – 1/2 Passport Day** | **3.5 Eligible CPD Hours**

SEMINAR MATERIAL: PAPERLESS | OPTIONAL: LAPTOP

Strategy and Risk Management for Financial Managers

LEVEL Intermediate

Prerequisite

None.

Overview

Successful financial managers must thoroughly understand governance and strategy, and how to relate it to their reporting and control responsibilities, as well as how to add value to the strategic process. Risk management is a critical element of planning, and internal control provides the foundation of risk management.

You may already be involved in the strategy-setting process in your own organization, or perhaps you want to get more involved in value-added planning issues. This one-day seminar combines lectures and workshops using a comprehensive case study. You will be exposed to some novel approaches and ideas, hone your analytical skills, and be able to develop practical solutions for your organization.

Applicable for

CPAs in industry, including finance directors, managers and controllers, who want to help their organization survive and prosper, and CPAs who advise clients.

Content

- role of the finance department
- strategy and corporate governance
- internal control: using the frameworks
- risk management and planning
- implementing change

Seminar Material Format

Paperless materials only.

Seminar Leader

Jeffrey Sherman, MBA, CIM, FCPA, FCA

Fee $450 | **PD Passport Valid – 1 Passport Day** | **7 Eligible CPD Hours**

For dates, times and venues – see page 30

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.

Applicable for

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

Seminar Material Format

Paperless materials only.

Seminar Leader

Geoffrey Howard, LL.B.

Fee $225 **PD Passport Valid – 1/2 Passport Day** **3.5 Eligible CPD Hours**

Advisory: There will be audio recording at the Dec 3 session.

CPABC
Certificate Programs

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 eligible for 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.

See next page for description of each session.

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.

Applicable for

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

Seminar Leader to be drawn from

Mia Maki, BA, MBA, FCPA, FCMA
Barbara VanDerLinden, FCPA, FCMA
Denise Wong CPA, CA

SEMINAR MATERIAL PAPERLESS | OPTIONAL LAPTOP

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

SEMINAR MATERIAL PAPERLESS | OPTIONAL LAPTOP

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

SEMINAR MATERIAL PAPERLESS | OPTIONAL LAPTOP

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

SEMINAR MATERIAL PAPERLESS | OPTIONAL LAPTOP

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

For dates, times and venues – see page 30

New this fall!

Advanced Strategic Management Certificate Program

A program focused on integrating frameworks and strategic plan implementation, through the application of critical components of leadership and strategy.

The Advanced Strategic Management Certificate Program is a two-module program focused on integrating frameworks and strategic plan implementation, through the application of critical components of leadership and strategy, covered in the Strategic Management Certificate Program. It includes high-level frameworks for strategic planning, implementation and monitoring including risk assessment and determination of the impact of change management initiatives on governance and teams. Completion of the Strategic Management Certificate Program is not a pre-requisite.

The two modules are:
Strategy: Maps
Strategy: Links

Each module is eligible for 7 CPD Hours. In order to qualify for the certificate, members are required to complete all two modules. Modules do not need to be taken in order.

Overview

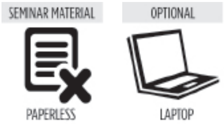
This program briefly reviews key content in the Strategic Management Certificate Program, and participants will demonstrate the ability to apply frameworks, best practices and models to different organizational scenarios, through case work and application to their organizations.

Applicable for

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

Seminar Leader to be drawn from

Mia Maki, BA, MBA, FCPA, FCMA
Barbara VanDerLinden, FCPA, FCMA

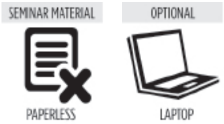


Strategy: Maps

In this session, participants will gain experience in strategy mapping and integration. One of the most difficult aspects of strategic planning is implementation, often because the organization overestimates its capacity to tackle several strategic initiatives. Using strategy mapping, participants will be able to understand how to assess and consider limited resources in strategic planning and how to best make hard choices between strategic alternatives, priorities and resources.

Content

The session includes case-based learning and application exercises that allow participants to start applying the best practices and strategy map to their organization's strategic plan, and optimize for success.



Strategy: Links

This case-based, interactive session takes participants through a process of analysis and review, allowing a big picture perspective, balanced with emphasis of key details and the importance of making hard choices throughout the process. A comprehensive framework for strategic planning "Links", including implementation and monitoring, will be introduced and applied, giving participants a framework and the analysis tools used to make decisions and populate the framework.

Content

The session includes case-based learning and application exercises that allow participants to start applying the best practices and Links model to their organization's strategic plan, and optimize for success.

Taxation

SEMINAR MATERIAL PAPERLESS | OPTIONAL LAPTOP

Advanced Tax Planning for Business Succession

LEVEL Intermediate to Advanced

Prerequisite

This course is presented at an intermediate to advanced level, with the assumption that participants will have sufficient basic knowledge and experience in the areas of private company tax planning and transactions involving private company shares.

Overview

This seminar is designed to assist experienced tax practitioners in planning for owner-manager/private company business succession. The course will walk through the various stages of a business life cycle, with a view to identifying opportunities, techniques and tax considerations associated to intra-family and arm's length succession planning for private enterprises.

Course Description

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 business succession considerations. The focus will be on income tax considerations, although key non-tax issues will also be identified. This seminar is designed to provide the knowledge and tools necessary to identify, plan and manage business succession considerations for owner-managers of private enterprises through various phases of a business life cycle.

Applicable for

This seminar will be useful to accountants in public practice with clients who are owner-managers of private corporations, as well as in-house professionals of private enterprises, especially those facing succession issues.

Content

- general tax and non-tax considerations related to business succession and estate planning for owner/managers.
- understanding the 'Wealth Cycle' of an owner/manager's private enterprise
- estate freeze techniques and common corporate tax-deferred rollovers
- impact of the new "TOSI" and 'passive income rules' for private companies on business succession and the use of the small business deduction
- divisive reorganizations (related party and unrelated party butterflies)
- arm's length and non-arm's length divestiture planning
- capital gains exemption planning and 'purification' techniques
- post-mortem planning techniques

Seminar Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leaders

Asif Abdulla, JD
Alvin Lun, JD
Shawn Tryon, LL.B.

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

SEMINAR MATERIAL PAPERLESS | OPTIONAL LAPTOP

Advanced Tax Planning Strategies

LEVEL Advanced

Prerequisite

Participants should have a good knowledge of personal and corporate income tax.

Overview

This in depth 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.

Course Description

The course deals with tax planning opportunities arising in the restructuring of asset profiles, the sale of a business, business succession and estate planning, the use of partnerships and the use of trusts. The course also deals with anti-avoidance provisions to be considered by tax practitioners in these planning situations including the general anti-avoidance rule, shareholder benefit provisions, arm's length relationships, expense deductibility, inadequate consideration, attribution provisions, stop-loss provisions and anti-surplus stripping provisions.

Applicable for

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/trusts

Ethics Content

This seminar is eligible for 0.5 hours of ethics content.

Seminar Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leader to be drawn from

Sheryne Mecklai, CPA, CA, TEP
Andrew Taylor, CPA, CA

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

TITLE STATUS: NEW | SEMINAR MATERIAL: PAPERLESS | OPTIONAL: LAPTOP | AVAILABLE OPTION: ONLINE

An Introduction to FAPI

LEVEL Intermediate

Prerequisite

Strong working knowledge of existing rules in the *Income Tax Act* around taxation of Canadian corporations.

Overview

The Canadian foreign affiliate property income or FAPI regime is a complex set of tax rules, which are more important to understand when a business is expanding abroad. With careful planning and consideration, the negative aspects of the rules can be mitigated and planning opportunities can be uncovered. This seminar will provide an overview of the FAPI regime that tax practitioners should consider in advising Canadian clients or organizations with foreign business activities.

Your organization or client may make a decision to expand its business outside Canada to support future growth. While this not only increases legal and operational complexities, Canadian tax practitioners must now consider the outbound tax rules within the Income Tax Act including the FAPI rules. The FAPI rules introduce a number of tax risks and reporting obligations. This seminar will help practitioners identify FAPI risks and learn ways to mitigate such risks. The seminar will use extensive examples to illustrate the concepts and tips and traps to be aware of in structuring foreign operations.

By the end of this course, participants will be able to

- identify potential FAPI risks within foreign operations
- prepare basic FAPI computations
- identify potential methods to mitigate FAPI
- identify Canadian tax reporting implications for FAPI

Applicable for

Canadian tax practitioners with clients or working for an organization with operations outside Canada.

Content

- types of FAPI income
- consequences of earning FAPI
- recharacterization provisions
- FAPI computations
- reporting implications

Seminar Material Format

Paperless materials only.

Seminar Leaders

Paul Dhesi, CPA, CA
Kevin Too, CPA

Fee $130 | **PD Passport Valid – 1/3 Passport Day** | **2 Eligible CPD Hours**

Advisory: There will be audio recording at the Nov 22 session.

SEMINAR MATERIAL: PAPERLESS | OPTIONAL: LAPTOP

Corporate Restructuring – Application for Private Corporations

(formerly Corporate Restructuring – Practical Application)

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*. Participants should have an understanding the related and associated rules to the level provided in the seminar *Corporate Tax – Small Business Deduction & Private Corporate Groups*. This seminar requires that participants be familiar with Sections 85, 86, 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. Included are a brief high-level review of ITA sections and other technical rules that are commonly encountered in private corporation reorganizations.

Course Description

Practitioners who are involved with reorganizing private corporations need to consider a wide range of technical rules, develop a plan that meets the client's objectives, navigate the practical challenges of implementing the plan, and effectively communicate the plan to other professionals. This course includes a summary of the key technical income tax rules that may need to be considered. The mini-cases in the course provide a structured practical approach to identifying objectives, developing a plan, and managing the implementation.

Applicable for

Practitioners and managers involved in reorganizations or tax planning for groups of privately held companies.

Content

- gathering and evaluation client information and objectives.
- identifying alternatives and developing a plan
- high level review of key technical provisions.
  - Section 85
  - QSBC
  - Section 55
  - Part IV tax
  - stop-loss rules
  - attribution rules and TOSI
- implementation – developing the detailed plan.
- loss utilization mini-case
- employee buy-in mini-case

Seminar Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leaders

Laird Branham, CPA, CA
Sandy Stedman, CPA, CA

Fee $225 | **PD Passport Valid – 1/2 Passport Day** | **3.5 Eligible CPD Hours**

For dates, times and venues – see pages 30 to 33

SEMINAR MATERIAL PAPERLESS

OPTIONAL LAPTOP

Corporate Restructuring - Fundamentals

LEVEL Intermediate

Prerequisite

Participants should be familiar with the existing tax rules in the ITA.

Overview

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.

Course Description

Your or your client's business and personal situation is constantly changing. The existing business structure may no longer be suitable or ideal and you are seeking 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. It is common for the shares and debt of corporates to be transferred between taxpayers and entities to be combined for both tax and non-tax reasons.

This course will provide participants with a summary of the tools available to effect these transfers or mergers in a tax efficient manner. The course also considers the traps and anti-avoidance rules to consider when entering into such transactions.

Applicable for

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. Participants should take this course if they are involved in corporate reorganizations and want a more in depth understanding of the relevant Canadian income tax provisions to consider.

Content

- tax-deferred rollovers (other than Section 85)
- wind-ups
- amalgamations
- share exchanges and reorganizations
- anti-avoidance provisions
- divisive reorganizations

Seminar Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leader to be drawn from

Mike Coburn, BA(Hon), LL.B.
Shane Onufrechuk, FCPA, FCA
Andrew Taylor, CPA, CA

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

SEMINAR MATERIAL PAPERLESS

OPTIONAL LAPTOP

Corporate Restructuring – Section 85: Transfer of Property

LEVEL Intermediate

Prerequisite

Participants should be familiar with the ITA.

Overview

Professional accountants are often engaged by their clients or organizations 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 these objectives can be met in a tax-efficient manner. The provisions of Section 85 are complex and interact with a number of related and anti-avoidance provisions.

Course Description

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.

Applicable for

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 Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leader

Andrew Taylor, CPA, CA

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

SEMINAR MATERIAL — PAPERLESS | OPTIONAL — LAPTOP

Corporate Tax – Compliance & Planning in T2 Preparation

(formerly Corporate Tax – Tax Returns, Compliance and Planning)

LEVEL Introductory

Prerequisite
Participants with some corporate tax preparation experience will benefit, but it is 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 but does not address the completion of the tax return forms. Dependent on class discussion, not all topics in the seminar material may be covered in class but the material is intended as an ongoing reference source.

Course Description
This course addresses a wide variety of technical and practical issues encountered in 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. Tax planning matters are limited to those which can be implemented in the course of preparing the tax returns, and not broader tax planning which is undertaken on a more proactive basis. Participants wishing a more detailed review of corporate tax planning issues may wish to consider attending the Review of Corporate Tax Planning course, or courses focused on specific tax planning issues of interest.

Applicable for
Professionals who want a refresher on corporate tax preparation matters, 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 foundational (pre-certification) knowledge of corporate tax issues.

Content
- net income for tax purposes/taxable income
- asset transactions
- corporate relationships
- federal corporate taxes
- administration and disclosure
- provincial issues

Seminar Material Format
Paperless materials free of charge. Print option available for $20.

Seminar Leaders
Mark Ostry, CPA, CGA
Dave Rickards, CPA, CA

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

TITLE STATUS — NEW | SEMINAR MATERIAL — PAPERLESS | OPTIONAL — LAPTOP

Corporate Tax – Investment Holding Companies

LEVEL Intermediate to Advanced

Prerequisite
A basic understanding of corporate taxation.

Overview
The taxation of investment holding corporations have seen a number of significant changes over the past few years. This course will review these and other changes using a number of examples, as well as examine the issue that is now faced by many clients – should I keep or wind up my investment corporation?

Course Description
Using examples, this course will provide detailed coverage of the significant changes to the taxation of investment holding corporations and their impact, including the introduction of the passive income rules (which can impact the availability of the small business deduction of any associated corporations), the change in the RDTOH rules resulting in two pots of refundable tax, and the general increase in the tax rate for corporate investment income. Planning considerations will also be addressed, including the advantages that may still be provided by using an investment holding corporation, and the implications for winding up or maintaining an existing investment holding corporation.

Applicable for
Experience with taxation issues of private companies and familiarity with ITA.

Content
- advantages of an investment holding corporation – when to implement
- integration, tax rates, and related issues
- income splitting and estate freezes – possible with an investment holding corporation?
- the passive income rules
- RDTOH – eligible and non-eligible pots and dividends
- existing investment holding corporations – wind up or retain?

Seminar Material Format
Paperless materials free of charge. Print option available for $20.

Seminar Leader
Chris Ireland, B.Comm, CPA, CA, TEP

Fee $225 | **PD Passport Valid – 1/2 Passport Day** | **3.5 Eligible CPD Hours**

For dates, times and venues – see pages 30 to 33

SEMINAR MATERIAL PAPERLESS

OPTIONAL LAPTOP

Corporate Tax – Purchase and Sale of a Business

LEVEL Intermediate

Prerequisite

Participants should have a good working knowledge of the Canadian Income Tax Act

Overview

This seminar will provide an understanding and update of Canadian income tax issues for purchasers and vendors of businesses carried on in Canada, with an emphasis on transactions between Canadian private business owners and / or their privately-held corporations.,.

Course Description

This course will be presented in the context of commonly used transaction structures and business vehicles and will highlight anti-avoidance measures and planning opportunities, alert participants to issues arising when dealing with public corporations and non-residents of Canada, and update participants of the latest changes brought about by legislative amendments and court decisions.

Applicable for

Practitioners, industry members, and owners and key executives in privately owned Canadian businesses, who affected by taxation issues relevant to the purchase and sale of a business.

Content

- commercial factors, including
  - valuation
  - financing
  - buying/selling assets vs. shares
- selling/buying shares
  - purchaser - acquisition of control & asset basis bump
  - accounts receivable, inventory and capital assets
  - allocation of the sale/purchase price
  - tax status of vendor and purchaser and non-resident issues
  - contingent liabilities
- intra-family and intergenerational transfers
  - related and affiliated persons and non arms length issues
  - price adjustment clauses
  - the capital gains exemption and S. 84.1
- other issues
  - restrictive covenants - S. 68
  - interest expense
  - vendor take back financing
  - earnouts
  - retiring allowances and IPPs
  - employee share options/partnerships
  - GST/PST issues

Seminar Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leader to be drawn from

Dave Rickards, CPA, CA
Andrew Taylor, CPA, CA

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

SEMINAR MATERIAL PAPERLESS

OPTIONAL LAPTOP

Corporate Tax – RDTOH, CDA & Other Tax Accounts

LEVEL Intermediate

Prerequisite

Participants should be familiar with the existing tax rules in the ITA.

Overview

With the addition of the eligible RDTOH account in 2019 to the existing Eligible Dividend regime 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 seminar 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 seminar also includes a series of mini-cases that demonstrate the issues that need to be evaluated when dealing with these accounts.

Course Description

Integration is an important part of Canada's Income tax system for private corporations and the notional tax pools reviewed in this course are an important part of integration. This course will provide a common framework for considering GRIP, the three RDTOH pools, LRIP and CDA. The focus of this course is applying an understanding of these pools to effective tax planning.

Applicable for

Professionals involved in tax planning for privately held companies and their shareholders.

Content

- basic considerations for all tax accounts
- GRIP
- RDTOH (including the new eligible RDTOH)
- LRIP
- CDA
- review questions

Seminar Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leaders

Sandy Stedman, CPA, CA
Mike Stubbing, CPA, CA, CFP, TEP

Fee $225 **PD Passport Valid – 1/2 Passport Day** **3.5 Eligible CPD Hours**

Corporate Tax – Review of Tax Planning

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 seminar is designed for those who desire to update and refresh their knowledge in both technical and tax planning issues for corporations. Although taxation of both public and private corporations is reviewed, the primary focus is on the taxation of private companies.

Course Description

This course is being offered to provide a "refresher" overview of tax issues relating to corporate tax payers. 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.

Applicable for

Those involved in corporate tax matters for private corporations who 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 Material Format

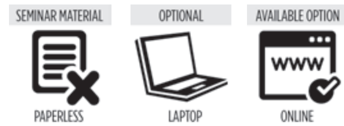
Paperless materials free of charge. Print option available for $20.

Seminar Leaders

Kent Greaves, CPA, CA
Mark Ostry, CPA, CGA
Andrew Taylor, CPA, CA

Fee $785 **PD Passport Valid - 2 Passport Days** **14 Eligible CPD Hours**

Advisory: There will be video recording at the Oct 28-29 session.



Corporate Tax – Scientific Research and Experimental Development (SR&ED): Fundamentals

LEVEL Introductory

Prerequisite

A basic understanding of corporate taxation and investment tax credits will be helpful.

Overview

This introductory course outlines the fundamental elements of the SR&ED program which benefits over 20,000 taxpayers each year. Many claimants are small businesses who are able to claim cash refunds which are an important source of funding for R&D and other business activities. Attendees will have an opportunity to consider the types of work that are included as eligible SR&ED, with reference to live examples based on recent case law. The allowable and qualified expenditure rules are also covered, with a focus on qualifying for refundable credits for CCPCs. Finally, there is a summary of tips and traps for successful claims.

Course Description

The SR&ED program is the most significant source of government funding for Canadian corporations. These companies often rely on their advisors to guide their staff in the preparation and filing of claims. This seminar provides members with materials necessary for a basic understanding of the program and eligibility criteria to assist in preparation of SR&ED claims and to incorporate these claims into corporation tax returns, using real-world examples to illustrate eligible SR&ED work and CRA assessing policies. It also provides a stepping-stone to the one-day course, *Corporate Tax – Scientific Research and Experimental Development (SR&ED): Advanced.*

Applicable for

Practitioners in public practice or industry seeking to understand the benefits, approaches and common pitfalls associated with SR&ED claims.

Content

- who can claim SR&ED tax credits
- what factors help you determine whether work is eligible for SR&ED tax credits
- what types of expenditures qualify for SR&ED tax credits
- what are the tax credit rates for different types of corporations
- brief introduction to provincial tax credits
- overview of SR&ED filing requirements and CRA review of claims

Seminar Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leader

Joanne Hausch, CPA, CA, ICD.D

Fee $225 **PD Passport Valid – 1/2 Passport Day** **3.5 Eligible CPD Hours**

Advisory: There will be video recording at the Nov 7 session.

For dates, times and venues – see pages 30 to 33

SEMINAR MATERIAL OPTIONAL

PAPERLESS LAPTOP

Corporate Tax – Scientific Research and Experimental Development (SR&ED): Advanced

LEVEL Advanced

Prerequisite

Participants should have tax experience and knowledge of the SR&ED program, or have attended the *Corporate Tax - Scientific Research and Experimental Development (SR&ED): Fundamentals* seminar.

Overview

This updated seminar 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 detail.

Course Description

The SR&ED program is the most significant source of government funding for Canadian businesses, providing tax benefits and cash refunds totaling nearly $3 billion to over 20,000 taxpayers each year. While the concept of tax credits for eligible work is straight forward, the legislation and administrative policies of the CRA are often challenging to interpret. Practitioners who are knowledgeable in the program and its complexities can file successful claims that will be upheld on audit, and gain significant benefits for their clients. The SR&ED: Advanced course examines the legislation and interpretation by the courts to provide participants with a better understanding of the key elements of eligible work, qualified expenditures, and investment tax credits.

Applicable for

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

Seminar Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leader

Joanne Hausch, CPA, CA, ICD.D

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

SEMINAR MATERIAL OPTIONAL

PAPERLESS LAPTOP

Corporate Tax – Section 55: How Safe Are Your Dividends?

LEVEL Intermediate

Prerequisite

Participants should be familiar 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.

Course Description

The longstanding rules in section 55 of the Income Tax Act were significantly amended in April of 2015, with the result that they apply to many more inter-corporate dividends than previously. In addition, the "exceptions" to avoid of the application of these rules have been severely curtailed. The broad manner in which these rules are written, along with the Canada Revenue Agency's evolving interpretation of these rules, creates difficulty in understanding how and when to apply them, both in theory and in practice. This course intends to provide a basis for better understanding these rules and their application.

Applicable for

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
- the calculation of safe income on hand
- the allocation of safe income on hand to the issued shares
- review questions
- CRA statements and administrative policies in respect to the application of these rules

Seminar Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leaders

Sandy Stedman, CPA, CA
Mike Stubbing, CPA, CA, CFP, TEP

Fee $225 **PD Passport Valid – 1/2 Passport Day** **3.5 Eligible CPD Hours**

SEMINAR MATERIAL PAPERLESS | OPTIONAL LAPTOP

Corporate Tax – Shutting Down the Corporation

LEVEL Intermediate

Prerequisite

Participants should be comfortable with the rules of the *Income Tax Act* and have experience with Canadian corporate tax.

Overview

This seminar will focus on the many tax issues that arise, from a compliance and planning perspective, when shutting down a corporation. It will focus exclusively on private companies. Common traps and planning opportunities that arise when shutting down corporations will also 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 seminar 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.

Course Description

Whether for performance reasons, planning reasons, or just because of the evolution of the life-cycle of a corporation (or its shareholders), CPAs are often required to assist in the "shutting down" of a corporation. This may occur via dissolution, amalgamation, or wind-up. This course discusses the key tax considerations to address in each of these scenarios.

Applicable for

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
- clearance certificates, liability for tax debts, tax refunds, assessing a dissolved corporation
- PUC and ACB issues

Seminar Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leader

Mike Stubbing, CPA, CA, CFP, TEP

Fee $225 **PD Passport Valid – 1/2 Passport Day** **3.5 Eligible CPD Hours**

Advisory: There will be audio recording at the Nov 5 session.

SEMINAR MATERIAL PAPERLESS | OPTIONAL LAPTOP

Corporate Tax – Small Business Deduction and Private Corporate Groups

LEVEL Intermediate

Prerequisite

Participants should be familiar 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. Mini cases and review questions are used to highlight the concepts in the materials. This seminar does not review of Section 55, Safe Income or GST/HST.

Course Description

The changes to the specified partnership income rules and the addition of the specified corporate income rules in 2016, the changes to the taxation of private corporations in 2018, and the already complex association rules have turned access to the small business deduction into one of the most complex provisions in the income tax act that most practitioners will deal with. This course will cover the key issues that impact the ability of private corporations to access to the small business deduction. This course starts with a detailed review of the relationship between corporations with a focus on the association rules and then has a detailed review if the impact of the specified partnership income and specified corporate income rules on streams of income. This course will assist practitioners in accessing the availability of the small business deduction for private corporations.

Applicable for

Practitioners and managers involved with groups of privately held companies.

Content

- the SBD – requirements and basic rules
- 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
- Part IV tax between private corporations
- use of trusts in the group

Seminar Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leaders

Laird Branham, CPA, CA
Sandy Stedman, CPA, CA

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

For dates, times and venues – see pages 30 to 33

SEMINAR MATERIAL — PAPERLESS | OPTIONAL — LAPTOP

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.

Applicable for
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

Seminar Material Format
Paperless materials free of charge. Print option available for $20.

Seminar Leader
Ed Kroft, Q.C., CPA (Hon.)

Fee $225 **PD Passport Valid – 1/2 Passport Day** **3.5 Eligible CPD Hours**

SEMINAR MATERIAL — PAPERLESS | OPTIONAL — LAPTOP | AVAILABLE OPTION — ONLINE

GST/HST – CRA Audit

LEVEL Intermediate

Prerequisite
GST/HST - Fundaments or a good working knowledge of GST/HST rules.

Overview
Nothing is more terrifying than receiving a letter in the mail stating your company has been selected for a GST/HST audit.

This full-day course presumes you have completed the GST/HST: The Fundamentals seminar. It provided a review of a typical Canada Revenue Agency (CRA) audit from start to finish and discusses some of the common audit exposures creating assessments for taxpayers.

It will also explain how to proactively prepare for a future audit, provide tips on how to manage an audit, and after-audit issues including the assessment of penalties and the objection process.

Course Description
This full-day course will provide a review of a typical Canada Revenue Agency (CRA) GST audit and discuss some issues creating taxpayer assessments.

The course will also teach you how to minimize GST/HST exposures by learning how to identify the most common compliance exposures which will be illustrated using everyday examples applicable to businesses of all sizes.

This information will be extremely useful to CPA's and students and for those who work with sales taxes on a daily basis. Being proactive is the key to an audit with a good outcome. Prerequisite to this is course is GST/HST: The Fundamentals.

Applicable for
CPAs, students, practitioners, and other advisors who want to obtain a greater understanding of the top common GST/HST audit exposures and the CRA audit process.

Content
- overview of the audit
- what can be done before the audit
- what happens during the audit
- what is involved in finalizing the audit
- what happens after the audit
- the top common audit exposures

Seminar Material Format
Paperless materials free of charge. Print option available for $20.

Seminar Leader
Katherine Xilinas, LL.B.

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

SEMINAR MATERIAL PAPERLESS
OPTIONAL LAPTOP

GST/HST - Fundamentals

LEVEL Introductory

Prerequisite

Participants should have a good solid understanding of accounting and bookkeeping principles.

Overview

The application of Canada's federal sales tax, the GST/HST is often far more complex than practitioners or businesses realize. The GST/HST principles involved are often 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 the GST/HST.

Course Description

The course provides an overview of Canada's federal sales tax for both practitioners and accountants in industry. There is a review of the three different types of supplies and their significance. The GST and HST place of supply rules are presented in detail with lots of examples because their misinterpretation often creates significant exposures for suppliers located in both non-HST and HST provinces.

The course also covers registration, collection requirements, who pays tax, input tax credit entitlements and some cross border issues. The material will highlight sources of errors and assessments frequently discovered during a GST audit or a review of a client's books and records.

Applicable for

CPAs and students, practitioners to accountants in business/industry and other advisors who want to obtain a greater understanding of the federal sales tax system in Canada. It will also be beneficial to those who deal with the Goods and Services Tax (GST) and Harmonized Sales Tax (HST) on a daily basis or those who would like a refresher and update of trending issues.

Content

- GST/HST basics
- who pays GST/HST?
- collecting GST/HST
- GST place-of-supply rules
- HST place-of-supply rules
- other collection issues
- import issues
- export issues
- general recovery rules
- temporary large business restrictions
- employee reimbursements and allowances
- reporting net tax overview
- compliance issue overview

Seminar Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leader to be drawn from

Charlotte Hoggard, CPA, CGA, CFI
Ron Osborne, CPA, CA

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

SEMINAR MATERIAL PAPERLESS
OPTIONAL LAPTOP

GST/HST - NFPOs

LEVEL Introductory to Intermediate

Prerequisite

Participants should have a good general understanding of the 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.

Course Description

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 seminar 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.

Applicable for

Professionals involved in the accounting for non-profit organizations including those who are responsible for or provide advice 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 Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leader

Ron Osborne, CPA, CA

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

For dates, times and venues – see pages 30 to 33

SEMINAR MATERIAL PAPERLESS

OPTIONAL LAPTOP

GST/HST – Real Property

LEVEL Intermediate

Prerequisite

Participants should have a 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.

Course Description

This course will explore in detail 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 presentation will be in a lecture format, using examples drawn from CRA rulings, case law and real-life experiences of the presenter and participants.

Applicable for

Financial professionals 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
- deemed trust provisions, including liability for mortgage lenders
- 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, including Speculation and Vacancy taxes

Seminar Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leader

Ron Osborne, CPA, CA

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

SEMINAR MATERIAL PAPERLESS

OPTIONAL LAPTOP

GST/HST – Specific Topics

LEVEL Intermediate

Prerequisite

GST/HST – Fundamentals, or a good working knowledge of the GST and HST rules.

Overview

Failure to be aware of the complexities of the GST and HST can result in lost recovery opportunities or worse, large tax assessments.

This course presents advanced GST/HST topics to enhance your knowledge about Canada's value-added-tax. Concepts related to the application and the recovery of GST/HST will be discussed.

Course Description

This course builds on the knowledge participants received during the *GST/HST - Fundamentals* seminar. It will provide participants with an overview of more important GST/HST concepts, definitions and identifies some important areas which are frequent sources of errors/assessments.

Participants will be exposed to various GST and HST topics and issues accompanied by relevant everyday examples. At the end of the day, attendees will have been exposed to an abundant of common GST/HST issues. This information will be extremely useful to CPAs, students and for those who work with sales taxes on a daily basis. It is a great overview of topics to reaffirm your knowledge of the GST/HST and receive an update on new and trending issues.

Applicable for

CPAs and students, practitioners to accountants in business/industry and other advisors who want to obtain a greater understanding of the federal sales tax system in Canada. It will also be beneficial to those who deal with the Goods and Services Tax (GST) and Harmonized Sales Tax (HST) on a daily basis or those who would like a refresher and update of trending issues.

Content

- introduction
- review of important concepts
- collection issues
- common recovery issues
- cross border issues
- other issues
- audits, assessments and director liability

Seminar Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leader to be drawn from

Charlotte Hoggard, CPA, CGA, CFI

Ron Osborne, CPA, CA

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

SEMINAR MATERIAL PAPERLESS | OPTIONAL LAPTOP

Income Tax – 5 Years of Developments

LEVEL Intermediate

Prerequisite

Participants should have a comprehensive understanding of basic corporate and personal income tax.

Overview

Income tax changes and evolves over time. “Keeping up” is 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.

Course Description

This seminar provides an opportunity for those who haven’t regularly taken income 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.

Applicable for

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 Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leader

Mark Ostry, CPA, CGA

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

SEMINAR MATERIAL PAPERLESS | OPTIONAL LAPTOP

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.

Course Description

This course is not intended to be a technical review of specific tax legislation but an overview of areas where professionals may encounter risk. It will include a discussion of technical issues associated with the areas where CPA Professional Liability Plan claims experience shows the greatest number and dollar value of claims. It is beyond the scope of this course to discuss all areas of risk a professional advisor may encounter.

Applicable for

This seminar is valuable to practitioners who want to obtain a better understanding of some of the areas of risk, and to new practitioners who may find the information useful in developing their tax services and to General practitioners and members in industry who are responsible for tax reporting compliance.

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/HST; 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 Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leader

Mark Ostry, CPA, CGA

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

For dates, times and venues – see pages 30 to 33

SEMINAR MATERIAL PAPERLESS | OPTIONAL LAPTOP

Income Tax – Consequences to Avoid

(formerly Income Tax – Essentials for General Practitioners)

LEVEL Intermediate

Prerequisite

Participants should have 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.

Course Description

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 also provided. The seminar notes provide detailed background information.

Applicable for

CPAs who are not tax specialists; and work in an environment where income tax consequences matter.

Content

- investments in a corporation
- 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 Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leader

Mark Ostry, CPA, CGA

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

SEMINAR MATERIAL PAPERLESS | OPTIONAL LAPTOP

Income Tax – Employee Benefits

LEVEL Intermediate

Prerequisite

Participants should have a 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.

Course Description

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 increase their ability to advise on tax-effective employee remuneration strategies using benefit plans.

Applicable for

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 Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leader

Mark Ostry, CPA, CGA

Fee $225 | **PD Passport Valid – 1/2 Passport Day** | **3.5 Eligible CPD Hours**

SEMINAR MATERIAL PAPERLESS · OPTIONAL LAPTOP

Income Tax – Everyday Issues for General Practitioners

LEVEL Intermediate

Prerequisite

Participants should have 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.

Course Description

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.

Applicable for

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 is eligible for 0.75 hours of ethics content.

Seminar Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leader to be drawn from

Tara Benham, FCPA, FCA
Mark Ostry, CPA, CGA
Dave Rickards, CPA, CA
Andrew Taylor, CPA, CA

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

SEMINAR MATERIAL PAPERLESS · OPTIONAL LAPTOP

Income Tax – Income Splitting, a New Era

LEVEL Introductory to Intermediate

Prerequisite

Participants should have 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, became effective in 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. Furthermore, some situations may be caught when income splitting was not an objective.

Course Description

This half-day seminar covers the tax benefits of income splitting, provides a detailed review of relevant income tax legislation, and reviews remaining opportunities to accomplish income splitting. It also covers suggestions and planning to manage, mitigate and restructure with a view to the TOSI rules.

Applicable for

CPAs - with a basic knowledge of income tax - who advise individuals, professionals or business owners on matters related to income splitting.

Content

- recent developments including the far-reaching 'tax on split income' (TOSI) rules
- a review of rules that restrict or impede income splitting
- comprehensive coverage of the implications of TOSI and when it applies
- various provisions that promote or permit income splitting
- income splitting strategies and suggestions to manage exposure to adverse income tax consequences triggered by income splitting rules

Seminar Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leader to be drawn from

Mark Ostry, CPA, CGA
Andrew Taylor, CPA, CA

Fee $225 | **PD Passport Valid – 1/2 Passport Day** | **3.5 Eligible CPD Hours**

For dates, times and venues – see pages 30 to 33

SEMINAR MATERIAL: PAPERLESS | OPTIONAL: LAPTOP

Income Tax - Partnerships

LEVEL Intermediate

Prerequisite

Participants should have general corporate and personal income tax knowledge.

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.

Course Description

This course reviews the manner in which partnerships and their partners are taxed, with reference to the relevant statutory provisions, case law and CRA administrative positions. The course is being offered in order to allow participants to better understand "what" and "why" issues in preparing returns, as well as to allow participants to better advise clients with or considering partnership structures. The potential participants who would benefit from attending are accountants who prepare partnership returns or who advise clients that use partnerships.

Applicable for

Professionals who 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
- introduction to income splitting

Seminar Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leader

Dave Rickards, CPA, CA

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

TITLE STATUS: NEW | SEMINAR MATERIAL: PAPERLESS | OPTIONAL: LAPTOP

Income Tax – Principal Residences

LEVEL Intermediate

Prerequisite

Knowledge of the *Income Tax Act*.

Overview

Many Canadians own a principal residence, but the tax implications of transactions involving principal residences are not always well known or fully understood. This course will examine all aspects of principal residences from a Federal tax perspective, including situations that are unusual and can give rise to unexpected issues or outcomes.

Course Description

This course covers the wide variety of Federal tax issues that can arise regarding principal residences. This includes the requirements for a property to be classified as a principal residence, ownership (including bare trustees), the "ordinarily inhabited" requirement, and housing units on multiple or large properties. Other topics to be addressed include income earned from a principal residence and the concept of "incidental income", change-in-use rules and partial dispositions or residences held through trusts.

Applicable for

Anyone who owns a principal residence, and financial professionals who provide advice to owners.

Content

- the requirement that a principal residence by capital property (and the implications to house flippers) including the doctrine of secondary intention.
- what is considered a "housing unit" including trailers and houseboats
- who owns the property including bare trustees
- what conditions meet the "ordinarily inhabited" rule including situations where taxpayers have moved into care facilities.
- how a property is designated as a principal residence the mechanics of the principal residence formula
- situations where properties are used to earn income and the concept of "incidental income"
- housing units on multiple properties and properties in excess of ½ an hectare.
- partial dispositions of a property (including prior subdivisions)
- the change-in-use rules and elections to avoid the change in use rules and the implications of filing these elections
- residences held through trusts and the impact of the October 2016 legislative amendments.
- the impact of separation and divorce on the principal residence exemption.

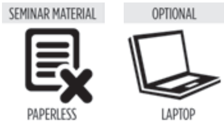
Seminar Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leader

Hugh Woolley, CPA, CA

Fee $225 | **PD Passport Valid – 1/2 Passport Day** | **3.5 Eligible CPD Hours**



Income Tax – Real Estate

LEVEL Intermediate

Prerequisite

Participants should be familiar 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.

Course Description

Starting with a review of the structures available to undertake real estate transactions, this course follows with a detailed look at income tax issues arising on the acquisition, development, holding and then disposition of Canadian real estate. Some coverage of provincial tax issues involving real estate will be included. 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 seminar does not provide a detailed or complete discussion of the impact of indirect taxes on real estate.

Applicable for

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

- various structures for the ownership of real estate and its acquisition
- cost of acquiring and holding & developing real estate
- issues surrounding the disposition of real estate
- corporate reorganizations involving real estate
- provincial tax issues involving real estate

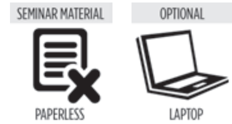
Seminar Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leader

Hugh Woolley, CPA, CA

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**



Income Tax – Update 2019

LEVEL Intermediate

Prerequisite

Strong knowledge of current *Income Tax Act*.

Overview

This seminar provides a detailed summary of tax law changes in the past year and examines current changes and relevant issues in taxation that affect individuals and most businesses in the private sector. Course coverage will be largely restricted to changes in the last year.

Course Description

Learn how the current levels of personal and corporate tax rates affect and possibly change accepted tax planning techniques. The proposals from the 2019 Federal Budget, as well as other sources of information from the Department of Finance and the Canada Revenue Agency (CRA are discussed together with other particular subjects of current relevance and interest.

Applicable for

Public accounting practitioners (partners, managers) advising their clients, as well as tax practitioners, controllers, and finance managers from industry. This seminar will be beneficial to those who need current information to advise clients, deal with the CRA, and who want to update their existing knowledge of income tax issues to incorporate developments in the past year.

Content

- tax rate changes/integration
- new rules dealing with the taxation of private companies, passive investment income, dividend sprinkling, small business deduction, etc.
- federal budget (2019)
- CRA administrative matters
- BC provincial update

Seminar Material Format

Paperless materials free of charge. Print option available for $20.

Special Note

As the course focuses only on recent developments, it is best suited for members who take the course annually. Those looking for an update of more than one year may consider taking *Income Tax – 5 Years of Developments*.

Seminar Leaders to be drawn from

Dwayne Dueck, CPA, CA	Ed Kroft, Q.C., CPA (Hon.)
Elvin Law, CPA, CGA	Richard Myers, CPA, CA
Mark Ostry, CPA, CGA	Dave Rickards, CPA, CA
Brian Sanders, CPA, CA	Andrew Taylor, CPA, CA

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

Advisory: There will be video recording at the Dec 11 session.

For dates, times and venues – see pages 30 to 33

TITLE STATUS: NEW | SEMINAR MATERIAL: PAPERLESS | OPTIONAL: LAPTOP

NFPO - Taxation

LEVEL Introductory to Intermediate

Prerequisite

None.

Overview

This seminar will provide a detailed technical review of the numerous income tax issues faced by registered charities and not-for-profit organizations.

Course Description

This seminar will address income tax issues specific to organizations carried on for charitable or not-for-profit purposes. Charity and not-for-profit tax rules are substantially different from those applicable to private sector organizations. Without a solid understanding of these rules, organizations may encounter difficulties meeting their tax filing requirements and complying with the numerous rules set out in the *Income Tax Act* and related jurisprudence and guidance.

Applicable for

Members in the charities and/or not-for-profit sectors, practitioners who provide advice to registered charities or NFPO entities, and practitioners or board members who are new to charities/NFPO, or who require a refresher.

Content

- 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 Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leader

Hayley Maschek

Fee $450 | **PD Passport Valid – 1 Passport Day** | **7 Eligible CPD Hours**

SEMINAR MATERIAL: PAPERLESS | OPTIONAL: LAPTOP

Personal Tax – Compliance & Planning in T1 Preparation

LEVEL Introductory

Prerequisite

It would be beneficial but not essential to have some experience with personal tax preparation.

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.

Course Description

A wide variety of issues are encountered in the preparation of Canadian personal income tax returns. This course addresses technical and practical issues arising from these diverse issues, to better prepare the participant to prepare and/or review personal income tax returns and to identify and address planning opportunities. The course does not address the completion of the tax return forms.

Tax planning matters are limited to those which can be implemented in the course of preparing the tax returns, and not broader tax planning which is undertaken on a more proactive basis. Participants wishing a more detailed review of personal tax planning issues may wish to consider attending the Review of Personal Tax Planning course, or courses focused on specific tax planning issues of interest.

Applicable for

Professionals who want a refresher on personal tax preparation matters, those who have been away from personal taxes for some time and want an understanding of the issues which may arise in personal tax return preparation; or professionals seeking to build on their foundational (pre-certification) knowledge of personal tax issues.

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 Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leader

Mark Ostry, CPA, CGA

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

SEMINAR MATERIAL | OPTIONAL | AVAILABLE OPTION
PAPERLESS | LAPTOP | ONLINE

Personal Tax – Review of Tax Planning

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 seminar 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.

Course Description

This course is being offered to provide a "refresher" overview of tax issues relating to personal tax payers. Detailed reference materials, covering a broad range of income tax topics for use in answering tax related issues will be provided. 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.

Applicable for

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 Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leader

Mark Ostry, CPA, CGA

Fee $785 **PD Passport Valid - 2 Passport Days** **14 Eligible CPD Hours**

Advisory: There will be video recording at the Nov 4-5 session.

SEMINAR MATERIAL | OPTIONAL | AVAILABLE OPTION
PAPERLESS | LAPTOP | ONLINE

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.

Applicable for

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

Seminar Material Format

Paperless materials only.

Seminar Leader

Genevieve Taylor, LL.B.

Fee $130 **PD Passport Valid – 1/3 Passport Day** **2 Eligible CPD Hours**

Advisory: There will be audio recording at the Nov 20 session.

For dates, times and venues – see pages 30 to 33

TITLE STATUS: NEW | SEMINAR MATERIAL: PAPERLESS | OPTIONAL: LAPTOP

PST – Review of Jurisdictional Sales Tax

LEVEL Introductory

Prerequisite

No prior experience is required. However the more a person is involved in PST and QST matters, the more they will gain from taking this course.

Overview

A broad outline of the four main provincial sales taxes will be outlined, starting with basic concepts and moving toward more complex and province-specific subjects. Participants will leave the course with a better understanding of the major issues that can impact a person operating in the four provinces, and with a better knowledge of the differences between the four jurisdictions.

Course Description

This course is intended to provide exposure to the key topics that concern the application of the four province's sales tax regimes.

The course will start with a high level discussion on the policy intent and application of a "use" tax compared to the application of a "value-added tax" (VAT). While the three prairie provinces' sales tax is a single stage "use" tax, the Quebec Sales Tax (QST) is a VAT very similar to the GST/HST. Accordingly, many concepts of the QST will be a separate component of the course. Businesses often venture into a PST province not knowing what their added costs will be. They may also venture into Quebec which has a VAT harmonized with GST/HST, but is not harmonized in its administration. Most of the concepts in the taxes will be covered. Examples are provided to demonstrate the application of many concepts.

Applicable for

Whether working in industry or public practice, persons responsible for sales tax matters will gain added information and knowledge from this course.

Content

- PST vs. GST/HST; and QST vs. GST/HST
- legislation and tax rates
- sales tax base – application of PST and QST to property
- taxable Services for PST
- motor vehicles, boats and aircraft/real property contractors
- assets brought into jurisdiction for temporary use
- exemptions: consumer goods, agriculture, manufacturers & producers, by class of person
- reorganizations and transfers/refunds
- administration and enforcement
- new issues arising: Quebec's "Netflix" amendments; US Wayfair Case

Seminar Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leader

Charlotte Hoggard, CPA, CGA, CFI

Fee $225 | **PD Passport Valid – 1/2 Passport Day** | **3.5 Eligible CPD Hours**

SEMINAR MATERIAL: PAPERLESS | OPTIONAL: LAPTOP

RIP – Estate and Testamentary Trust Returns

LEVEL Intermediate

Prerequisite

Participants should have knowledge of personal tax, and some experience preparing T3 trust tax returns is also recommended.

Overview

This seminar provides a review of the issues faced when preparing trust filings for deceased taxpayers.

Course Description

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. This 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.

Applicable for

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 Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leaders

Pam Prior, CPA, CA, TEP
Francis Wong, CPA, CA

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

SEMINAR MATERIAL — PAPERLESS | OPTIONAL — LAPTOP

RIP – Estate Planning

LEVEL Advanced

Prerequisite

Participants should have 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.

Course Description

This course 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 seminar is to maintain flexibility in the estate plan while managing estate planning risk.

Applicable for

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 Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leader to be drawn from

Pam Prior, CPA, CA, TEP
Andrew Taylor, CPA, CA
Francis Wong, CPA, CA

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

SEMINAR MATERIAL — PAPERLESS | OPTIONAL — LAPTOP

RIP – Terminal Filing

LEVEL Intermediate

Prerequisite

Participants should have 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.

Course Description

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.

Applicable for

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 Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leaders

Pam Prior, CPA, CA, TEP
Francis Wong, CPA, CA

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

 For dates, times and venues – see pages 30 to 33

SEMINAR MATERIAL: PAPERLESS | OPTIONAL: LAPTOP

Tax for Controllers

LEVEL Introductory

Prerequisite

None.

Overview

This seminar will help controllers of private companies stay current on a broad array of income tax, GST/HST and related compliance issues.

Course Description

This two-day course is compliance oriented with a high level review of a wide range of issues and focus on issue identification. GST/HST is covered at a basic level in the course. Industry specific items and all provincial taxes are beyond the scope of the course.

Applicable for

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

- HR – payroll, benefits, and employee vs independent contractor
- 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: employees who require a car for 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: a basic review of key small business deduction issues including; income tax filing requirements, due dates, and 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; partnership returns; collections and offsets

Ethics Content

This seminar is eligible for 0.5 hours of ethics content.

Seminar Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leader

Sandy Stedman, CPA, CA

Fee $785 | **PD Passport Valid - 2 Passport Days** | **14 Eligible CPD Hours**

TITLE STATUS: NEW | SEMINAR MATERIAL: PAPERLESS | OPTIONAL: LAPTOP

Tax on Sharing Economy

LEVEL Introductory

Prerequisite

Basic familiarity with personal and corporate income tax rules

Overview

The Sharing Economy has developed into a significant portion of the Canadian economy, and is expected to grow over the coming decade. This session will highlight the tax issues associated with some common sharing activities.

Course Description

More than 10% of adult Canadians participated in the Sharing Economy in 2016, however, they often fail to realize the tax consequences of these activities. This session will outline key components of the Sharing Economy and highlight a number of select, and often unexpected, tax issues facing these entrepreneurs, as well as planning opportunities to mitigate the tax impact.

Applicable for

Anyone who wants to better understand the tax implications of the Sharing Economy.

Content

This session will cover the following common Sharing Economy activities and the related tax issues

- accomodation
- ride sharing
- peer-to-peer lending
- trading and reselling
- crowdfunding

Seminar Material Format

Paperless materials only.

Seminar Leader

Richard Myers, CPA, CA

Fee $130 | **PD Passport Valid – 1/3 Passport Day** | **2 Eligible CPD Hours**

SEMINAR MATERIAL PAPERLESS
OPTIONAL LAPTOP

Taxation of Domestic Trusts - Advanced

LEVEL Advanced

Prerequisite

Taxation of Domestic Trusts – Fundamentals or equivalent knowledge.

Overview

This seminar 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 seminar 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 and be able to propose solutions.

Course Description

This course deals primarily with tax planning for trusts and potential traps and technical challenges that may be encountered in the course of tax planning. The course is being offered to allow participants who advise clients with trust structures or who are considering trust structures as to opportunities that may be available and to identify further issues in the course of preparing returns. Participants will benefit from attending if their objective is to move from a compliance-based trusts practice to an advisory-based practice.

Applicable for

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 Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leaders

Shane Brown, LL.B.
Shawn Tryon, LL.B.

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible Eligible CPD Hours**

SEMINAR MATERIAL PAPERLESS
OPTIONAL LAPTOP

Taxation of Domestic Trusts - Fundamentals

LEVEL Intermediate

Prerequisite

Participants should be familiar with the existing tax rules in the ITA.

Overview

This seminar 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 seminar is highly relevant to any practitioner who has a client with a family trust in its structure. It offers a comprehensive analysis of recent amendments to the Income Tax Act. 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.

Course Description

This course reviews the basic tenants of trust law, the provisions of the Income Tax Act, case law and CRA administrative positions that are fundamental to the taxation of trusts. The course is being offered to ensure that accountants who prepare trust returns or who advise clients with trust structures or who are considering trust structures have a functional knowledge of the applicable tax rules and the ability to issue-spot potential problems that may require specialist assistance. Participants who would benefit from attending are accountants of any experience level who have a working knowledge of personal income tax rules and whose clients include estates, trusts or high net worth individuals.

Applicable for

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 Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leaders

Shane Brown, LL.B.
Shawn Tryon, LL.B.

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

For dates, times and venues – see pages 30 to 33

SEMINAR MATERIAL PAPERLESS | OPTIONAL LAPTOP | AVAILABLE OPTION ONLINE

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.

Applicable for

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

Seminar Material Format

Paperless materials only.

Seminar Leaders

Christine Muckle, JD
Genevieve Taylor, LL.B.

Fee $130 — PD Passport Valid – 1/3 Passport Day — 2 Eligible CPD Hours

Advisory: There will be audio recording at the Nov 7 session.

SEMINAR MATERIAL PAPERLESS | OPTIONAL LAPTOP

US Corporate Tax - Fundamentals

LEVEL Introductory

Prerequisite

It will be beneficial for participants to have some understanding of Canadian tax principles.

Overview

This seminar 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.

Course Description

This seminar will start with a high level overview of the U.S. Internal Revenue Code and how it imposes tax and filing requirements on U.S. and Canadian corporations. Participants will gain a basic understanding of how the Canada-United States Income Tax Convention interact with the Internal Revenue Code to provide reliefs to Canadian taxpayers. The seminar will also go into some details on the Canadian foreign affiliate rules and how cross-border corporate structures can be structured.

Applicable for

Practitioners and members in industry 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. This seminar is not intended for international or U.S. tax specialists who will be required to prepare 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
- 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 Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leader

Terence Wong, CPA, CA, CPA (Illinois)

Fee $450 — PD Passport Valid - 1 Passport Day — 7 Eligible CPD Hours

SEMINAR MATERIAL PAPERLESS
OPTIONAL LAPTOP

US Personal Tax - Fundamentals

LEVEL Introductory

Prerequisite

None.

Overview

This course will provide a general understanding of U.S. individual income taxation and Federal filing requirements of U.S. citizens, residents and non-resident aliens of the U.S.

Course Description

The determination of residency is an important factor in determining the manner in which an individual is subject to U.S. federal income tax. Understanding the rules for determining residency is critical to determine who is subject to U.S. federal taxation and the types of income subject to U.S. taxation. This seminar will provide a general understanding of U.S. taxation of resident and non-resident aliens of the U.S. Emphasis will be placed on the determination of residency for U.S. tax purposes and the corresponding U.S. taxation implications. There is also a general overview of, Estate Taxation, U.S. Foreign Reporting, FIRPTA, the U.S.-Canada Income Tax Treaty and how non-resident aliens may recover U.S. tax withheld on U.S. gambling winnings. State tax issues will be not be covered in detail, and real estate acquisition strategies will NOT be covered.

Applicable for

The seminar is designed for practitioners who want to gain a basic understanding of U.S. taxation for individuals and an update per the *Tax Cuts and Jobs Act* of 2017 to assist with the preparation of basic U.S. tax returns.

Content

- tax classification and residency status tests
- taxation of US citizens, resident aliens, non-resident aliens and key changes per the *Tax Cuts and Jobs Act*
- US Estate/Gift tax and foreign disclosures
- tax treaties
- FIRPTA and gambling winnings/losses

Seminar Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leader

John Demetri, CPA, CA, CPA (Illinois)

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

SEMINAR MATERIAL PAPERLESS
OPTIONAL LAPTOP

US Tax – Personal Investment in Real Estate

LEVEL Intermediate to Advanced

Prerequisite

Participants should be familiar with the Canadian ITA.

Overview

This seminar will provide an overview of the Canadian and U.S. (federal and state) tax issues that arise on the acquisition, ownership, and disposition of U.S. real estate by individual residents in Canada, whether for personal use, rental, or both.

Course Description

In this course, participants will gain knowledge of the Canadian and U.S. tax rules that are relevant when Canadians acquire, own, sell, gift or die owning U.S. real estate. The applicable tax filing requirements, including applicable elections will be discussed. This seminar 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, including the implications of death and of gifting U.S. real estate.

Participants will be exposed to relevant Canadian and U.S. tax rules through various case studies and sample tax returns to better understand the tax law. Discussion and the presenters' personal experiences will be part of the course to engage and provide practical experience to participants.

Applicable for

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, corporation, 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 Material Format

Paperless materials free of charge. Print option available for $20.

Seminar Leaders

Ryan Gill, CPA, CA, CPA (New Hampshire)
Benita Loughlin, CPA, CA

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hour**

For dates, times and venues – see pages 30 to 33

SEMINAR MATERIAL PAPERLESS | OPTIONAL LAPTOP | AVAILABLE OPTION ONLINE

US Tax Reform – Implications for Canadian Businesses

LEVEL Intermediate

Prerequisite

None.

Overview

This session will discuss the general impact of US tax reform on Canadian companies operating in the US, with a focus on practical examples for how to optimize cross-border structures in a post-tax reform world. It will include case studies on Canadian corporations exporting into the US, expanding into the US and acquiring US business, providing an integrated analysis of the US and Canadian tax considerations to be taken into account under each scenario.

Course Description

The 2017 tax reform package represented the biggest change to the US tax system since the 1980s. Today, almost two years after the legislation was passed, the US and international tax community is still adjusting and addressing continual new guidance to interpret and implement the new rules. It is important for Canadian businesses to understand how these tax changes could affect their current operations, their growth strategies, and the competitive landscape. The seminar will also provide case studies on Canadian corporations exporting into the US, expanding into the US and acquiring US business, providing a practical and integrated Canadian and US tax perspectives under each scenario.

Applicable for

Industry professionals or tax practitioners with working knowledge of tax, who deal with, or would like to understand, the implications of the US tax reform changes for Canadian businesses.

Content

- US corporate tax rate, factors that may impact the effective rate
- review of flow-through US tax rates: then and now
- changes to the US interest expense limitation and anti-hybrid provisions
- US capital asset expensing
- limitations on US net operating losses
- US international provisions – including, BEAT, GILTI, FDII
- Canadian foreign tax credits vs. foreign tax deduction
- overview of Canadian foreign affiliate regime
- overview of Canada-US tax treaty Limitation-on-Benefits provisions
- case studies

Seminar Material Format

Paperless materials only.

Seminar Leaders

Jodi Moss, CPA, CA
Wynn Vo, CPA, CA

Fee $225 | **PD Passport Valid – 1/2 Passport Day** | **3.5 Eligible CPD Hours**

Advisory: There will be audio recording at the Dec 12 session.

Wealth Management

Enough Bull: How to Retire Well Without the Stock Market

LEVEL Introductory

Prerequisite

None.

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.

Applicable for

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
- 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
- deposit insurance – find out who insures your investments and what the limits are

Seminar Material Format

Paperless materials only.

Special Notes

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 "S&P TSX TR GIC RoR Calculator," "Investment Option Cost Analyzer," "RRSP vs OS vs TFSA," "RRSP vs Retaining Profits in Corporation," "Tax Turbo Charged RRSP Calculator" and the "Money Maximizer" to see if you are saving enough for retirement.

Seminar Leader

David Trahair, CPA, CA

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

For dates, times and venues – see page 33

SEMINAR MATERIAL: PAPERLESS | NOTABLE FORMAT: HANDS-ON | OPTIONAL: LAPTOP

Smoke and Mirrors: Financial Myths that will Ruin Your Retirement Dreams

LEVEL Introductory

Prerequisite

None.

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.

Applicable for

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 Material Format

Paperless materials only.

Special Notes

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.

Seminar Leader

David Trahair, CPA, CA

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

SEMINAR MATERIAL: PAPERLESS | NOTABLE FORMAT: HANDS-ON | OPTIONAL: LAPTOP

The Procrastinator's Guide to Retirement

LEVEL Introductory

Prerequisite

None.

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.

Applicable for

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 – death, taxes, and inheritance; your credit card strategy; divorce

Seminar Material Format

Paperless materials only.

Special Notes

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," "Estate Planning Record Keeper," "RRSP Needed for Mortgage," and the "RRSP vs Pay Down Debt" calculators.

Seminar Leader

David Trahair, CPA, CA

Fee $450 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

The Simplest Personal Finance Strategy Ever

LEVEL Introductory

Prerequisite
None.

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.

Applicable for
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; identify your greatest source(s) of cash and make sure they keep on giving
- does money buy happiness - delve into the relationship; does a higher income make you happier; how changing your spending habits can improve your satisfaction level
- owning vs. renting - use 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
- mutual funds - how the sellers of mutual funds employ the Cash Cow Strategy to make themselves rich – at your expense
- CPP - how to calculate how much CPP pension you will receive, when to elect to start and what rate of return it provides using spreadsheets; history of CPPIB; enhancements to the CPP
- inflation – how the CPI index is measured; inflation, deflation, stagflation

Seminar Material Format
Paperless materials only.

Special Notes
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 "House Rent versus Buy Analyzer," the "RRIF vs Annuity Calculator," the "CPP Retirement Pension Calculator," the "CPP Return Calculator," and the "CPP Elect Age Calculator."

Seminar Leader
David Trahair, CPA, CA

Fee $450 **PD Passport Valid - 1 Passport Day** **7 Eligible CPD Hours**

BC Employer Training Grant

The Province of British Columbia has negotiated a new Workforce Development Agreement (WDA) with the Government of Canada that replaces the Canada-BC Job Fund Agreement (CJF). The new WDA provides B.C. with more funding and flexibility to address provincial labour market needs.

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

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

Read more about the B.C. Employer Training Grant at www.workbc.ca.

For dates, times and venues – see page 33

CPABC
Nexus Days

PD NEXUS

Fall-Winter 2019 Conference Days

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

Beyond Financial Reporting Insights
October 23, 2019
Vancouver Convention Centre West

Business Insights Kelowna
October 25, 2019
Coast Capri Hotel

Maximizing Diversity & Inclusion
November 19, 2019
Vancouver Convention Centre West

Local Government Accounting & Assurance Workshop
November 20-21, 2019
Coast Coal Harbour Vancouver

Public Practice Insights
November 26, 2019
Van Convention Centre West

Business Insights Vancouver
December 6, 2019
Van Convention Centre West

NOTABLE FORMAT: CONFERENCE DAY | SEMINAR MATERIAL: PAPERLESS | OPTIONAL: LAPTOP

PD Nexus: Beyond Financial Reporting

LEVEL General

Prerequisite

None.

Overview

Our Beyond Financial Reporting PD Nexus day is designed to bring you up to date on a variety of topics that extend beyond your finance and accounting role. From embracing innovation to addressing cybersecurity, improving workplace communication and addressing specific HR topics, this fast paced day will help you develop the skills you need to stretch beyond your core competencies. Come learn, grow your knowledge, network with your peers and develop as a business leader.

PD Nexus days bring together knowledge, skills and business professionals for a day of inspiring presentations, new tools and ideas and networking connections. PD Nexus days are passport eligible, and are a great opportunity to obtain CPD hours on timely and relevant topics for business leaders.

Applicable for

Professional accountants and other financial professionals who want to obtain additional knowledge and insights into topic areas that lie beyond traditional accounting and finance responsibilities.

Content

This conference-format Nexus day includes a mixture of plenary and breakout sessions on the following topics

- Icebergs, Waterfalls and Wicked Problems: The Promise of Design Thinking
- Cyber Security Attacks: What You Need to Know to Protect your Data & Your Business
- Essential HR Processes and Systems
- Presentation Skills for Introvert Accountants
- The Three C's of Effective Communication
- Employees' Off-Duty Conduct – When is it your Business?
- Optimizing Personal Productivity
- What's New in Excel

For detailed information on sessions and speakers, please check our website at pd.bccpa.ca or watch for future emails and flyers.

Seminar Material Format

Paperless materials only.

Conference Speakers

Our speakers are experts in their fields, and are highly regarded professionals in the business and academic community. A complete list of conference speakers and their biographies will be available on our website at pd.bccpa.ca.

Fee $475 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

NOTABLE FORMAT: CONFERENCE DAY | SEMINAR MATERIAL: PAPERLESS | OPTIONAL: LAPTOP

PD Nexus: Business Insights Kelowna

LEVEL General

Prerequisite

None.

Overview

Our PD Nexus: Business Insights day is coming to Kelowna for the first time and is a great opportunity to keep up with new developments in the ever-changing business environment. Come learn from subject matter experts, many of them local, on a wide variety of topics from technical updates on tax topics and Excel to seminars that will enhance your leadership skills and improve your personal productivity. This fast paced day will introduce you to new ideas, expand your knowledge and provide opportunities to network with your peers and develop as a business leader.

PD Nexus days bring together knowledge, skills and business professionals for a day of inspiring presentations, new tools and ideas and networking connections. PD Nexus days are passport eligible, and are a great opportunity to obtain CPD hours on timely and relevant topics for business leaders.

Applicable for

Professional accountants and other business professionals in the Okanagan area and beyond.

Content

This conference-format Nexus day includes a mixture of plenary and breakout sessions on the following topics

- Straight Talk – Understand the Challenge of Talking When Stakes are High
- Cyber Security Attacks: What You Need to Know to Protect your Data & Your Business
- Tax Update on CCA Rules
- The Challenge of Change
- What's New in Excel
- The Art of Negotiation
- Optimizing Personal Productivity
- The Consumer Protection Act and its potential impact on your business or organization

For detailed information on sessions and speakers, please check our website at pd.bccpa.ca or watch for future emails and flyers.

Seminar Material Format

Paperless materials only.

Conference Speakers

Our speakers are experts in their fields, and are highly regarded professionals in the business and academic community. A complete list of conference speakers and their biographies will be available on our website at pd.bccpa.ca.

Fee $475 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

For dates, times and venues – see page 33

NOTABLE FORMAT: CONFERENCE DAY | SEMINAR MATERIAL: PAPERLESS | OPTIONAL: LAPTOP

PD Nexus: Business Insights Vancouver

LEVEL General

Prerequisite

None.

Overview

Our semi-annual PD Nexus: Business Insights Day in Vancouver is a great opportunity to keep up with new developments in the ever-changing business environment. Come obtain new skills and knowledge from a wide variety of presentations, including the ever-popular economic update and technical topics such as tax, data analytics and Anti-Money Laundering awareness, as well as sessions focusing on the challenges and opportunities of innovation and how to embrace change. This fast paced day will introduce you to new ideas, expand your knowledge and provide opportunities to network with your peers and develop as a business leader.

PD Nexus days bring together knowledge, skills and business professionals for a day of inspiring presentations, new tools and ideas and networking connections. PD Nexus days are passport eligible, and are a great opportunity to obtain CPD hours on timely and relevant topics for business leaders.

Applicable for

Professional accountants interested in business issues and other financial professionals in business and industry.

Content

- Economic Update
- Thinking for a Change – Preparing Your Mind and Brain for Disruption
- Tax Update on CCA Rules
- Strategies for Leading in a VUCA World
- Innovation – Effective Tools and Culture
- Data Analytics
- Anti-Money Laundering and FINTRAC
- Digital Transformation and IT Departments

For detailed information on sessions and speakers, please check our website at pd.bccpa.ca or watch for future emails and flyers.

Seminar Material Format

Paperless materials only.

Conference Speakers

Our speakers are experts in their fields, and are highly regarded professionals in the business and academic community. A complete list of conference speakers and their biographies will be available on our website at pd.bccpa.ca.

Fee $475 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

NOTABLE FORMAT: CONFERENCE DAY | SEMINAR MATERIAL: PAPERLESS | OPTIONAL: LAPTOP

PD Nexus: Local Government Accounting & Assurance Workshop

LEVEL General

Prerequisite

Knowledge of local government legislation and terminology is assumed.

Overview

Chartered Professional Accountants of BC is pleased to offer this workshop in conjunction with the *Government Finance Officers Association of BC*.

The objective of this workshop is to provide a forum for practitioners and auditors on the accounting, auditing, reporting and financing to discuss the issues facing local governments. Practices within the Local Government sector are ever-evolving. This workshop will provide an opportunity for practitioners and auditors to get up to date on accounting and auditing practices, discuss the issues and exchange ideas. Attendees will have the opportunity to meet, interact, and exchange ideas with some of those involved in standard setting.

Applicable for

Local government finance professionals, staff who prepare financial statements and auditors of local government entities.

Content

- Public Sector Accounting Board update
- current standard and practices regarding audits
- topical issues in local government accounting
- emerging issues related to fraud and ethics

For detailed information on sessions and speakers, please check our website at pd.bccpa.ca or watch for future emails and flyers.

Seminar Material Format

Paperless materials only.

Special Notes

A special conference rate as well as a block of guest rooms have been arranged at the Coast Coal Harbour Hotel – registrants should book here if they require accommodation. Reserve by phone at 1 800 663.1144 or book online, and quote event code CCC-GFC7155. The cut-off date for this rate is October 29, 2019.

Speakers

To be announced. A complete list of conference speakers and their biographies will be available on our website at pd.bccpa.ca.

Fee $875 | **PD Passport Valid - 2 Passport Days** | **14 Eligible CPD Hours**

NOTABLE FORMAT – CONFERENCE DAY | SEMINAR MATERIAL – PAPERLESS | OPTIONAL – LAPTOP

PD Nexus: Maximizing Diversity & Inclusion

LEVEL General

Prerequisite

None.

Overview

Embracing diversity and fostering inclusion is not just a "people" issue, it's a key driver of productivity and creates competitive business advantages. However, it isn't easy. Truly embracing diversity of gender, culture, thought, ability and other measures takes conscious effort by individuals and organizations. This fast paced day will challenge you to overcome your unconscious bias, accept that healthy conflict is a sign of diversity and inclusion, and think about some issues that may be uncomfortable but which are necessary to ensure the path forward lifts everyone. Come network with your peers, and hear inspiring speakers who will inspire and challenge you to embrace diversity and inclusion in your life and workplace.

PD Nexus days bring together knowledge, skills and business professionals for a day of inspiring presentations, new tools and ideas and networking connections. PD Nexus days are passport eligible, and are a great opportunity to obtain CPD hours on timely and relevant topics for business leaders.

Applicable for

Professional accountants in all roles, and anyone interested in fostering diversity and inclusion in their lives and organizations.

Content

This conference-format Nexus day includes a mixture of plenary and breakout sessions on the following topics

- 50 Shades of Beige: Communicate with the Cross-Cultural Advantage
- #MeToo in a Man's World: A Discussion Like None other about Workplace Respect
- Unconscious Bias
- Managing Workplace Mental Health Issues
- Inclusive Communication: What are Your Non-Verbal Clues Saying?
- Creating Healthy Conflict
- The Role of Allies in Fostering Inclusion
- Empathetic Conversation

For detailed information on sessions and speakers, please check our website at pd.bccpa.ca or watch for future emails and flyers.

Seminar Material Format

Paperless materials only.

Conference Speakers

A complete list of conference speakers and their biographies will be available on our website at pd.bccpa.ca.

Fee $475 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

NOTABLE FORMAT – CONFERENCE DAY | SEMINAR MATERIAL – PAPERLESS | OPTIONAL – LAPTOP | AVAILABLE OPTION – ONLINE | AVAILABLE OPTION – LIVE STREAM

PD Nexus: Public Practice Insights

LEVEL Introductory to Intermediate

Prerequisite

None.

Overview

This year, our popular PD Nexus day for CPAs in public practice focuses on practice management and improving profitability. We have redesigned the day to bring you inspiring sessions on ways to maximize often-missed practice opportunities, identify risk areas where a specialist's help is needed and how to build on the value your professional designation and underlying ethics bring to your clients. Inspiring presentations will be combined with an updated format for the Ideas Exchange, where you can share ideas and inspiration with your peers. Also new this year is a networking reception and tradeshow with exhibitors who can show you tools, products and services to enhance your practice and improve performance, efficiency and profitability. And if you can't make it to Vancouver to attend in person, we will be offering virtual attendance via simulcasting. You'll finish the day feeling empowered and excited to be a practitioner – and will think of this day as "*Practice Made Perfect*".

PD Nexus days are passport eligible, and are a great opportunity to obtain CPD hours on timely and relevant topics for business leaders.

Applicable for

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

This conference-format Nexus day includes a mixture of plenary and breakout sessions on the following topics

- Ethics: Beyond Damage Control
- Your Oxygen Mask: How to Survive & Thrive in Business & Life
- GST & PST: Trouble Spots and How to Help Your Clients
- Simple Marketing Plans and Strategies for Busy CPAs
- Sleeper Income Tax Issues – and How to Avoid Them
- Cybersecurity for your Practice

For detailed information on sessions and speakers, please check our website at pd.bccpa.ca or watch for future emails and flyers.

Seminar Material Format

Paperless materials only.

Conference Speakers

A complete list of conference speakers and their biographies will be available on our website at pd.bccpa.ca.

Fee $475 | **PD Passport Valid - 1 Passport Day** | **7 Eligible CPD Hours**

Advisory: A portion of this session will be live streamed and video recorded.

For dates, times and venues – see page 33

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 Principal at Linda Lucas Consulting. Linda provides CEO, COO and CFO services to small- and medium-sized companies. She specializes in helping C-level executives and business owners identify and execute their strategic objectives, build strong teams and achieve operational excellence.

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

September 18-21, 2019	Westin Whistler Resort, Whistler
June 24-26, 2020	Location TBA, Vancouver
September 20-23, 2020	Westin Whistler Resort, 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 for offerings held outside of Vancouver, 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 22-25, 2019	Westin Whistler Resort, Whistler
November 13-16, 2019	Marriott Inner Harbour, Victoria
May 20-23, 2020	Westin Whistler Resort, Whistler
July 8-19, 2020	Location TBA, Vancouver
September 16-19, 2020	Westin Whistler Resort, Whistler

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 for offerings held outside Vancouver, 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 16-19, 2019	Westin Whistler Resort, Whistler
June 21-24, 2020	Westin Whistler Resort, Whistler
October 21-24, 2020	Westin Whistler Resort, 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 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

October 20-23, 2019	Westin Whistler Resort, Whistler
June 14-17, 2020	Westin Whistler Resort, Whistler
October 18-21, 2020	Westin Whistler Resort, 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

September 23-26, 2020 | Westin Whistler Resort, Whistler

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

May 11-13, 2020 | Location TBA, Vancouver

The CEO Program

Acquiring the Edge and Leading with Purpose

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	Westin Whistler Resort, Whistler	(Full)
July 13-16, 2020	Westin Whistler Resort, 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 Leadership 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 Video On-Demand

The following seminars have been video recorded from live, in-person offerings, and will be available as on-demand videos online, along with the corresponding course materials. Note that this is purely a self-study product, and there will be no access to facilitators for questions and answers. The dates indicated below the titles reflect when the video recordings will become available. Each title qualifies for verifiable CPD hours upon successful completion of a quiz at the end of the seminar.

Audit & Assurance

Assurance - Compliance with Agreements, Statutes and Regulations
Available: Dec 9, 2019 Description: Page 38
Fee $225 PD Passport Valid – 1/2 Day 3.5 Eligible CPD Hours

Assurance - Update 2019
Available: Nov 26, 2019 Description: Page 38
Fee $225 PD Passport Valid – 1/2 Day 3.5 Eligible CPD Hours

Audit Engagements - Review of the Standards
Available: Dec 15, 2019 Description: Page 41
Fee $785 PD Passport Valid – 2 Days 14 Eligible CPD Hours

Quality Control – Review of CSQC1
Available: Dec 18, 2019 Description: Page 43
Fee $225 PD Passport Valid – 1/2 Day 3.5 Eligible CPD Hours

Review Engagements - Application of the Standard
Available: February 4, 2020 Description: Page 44
Fee $450 PD Passport Valid – 1 Day 7 Eligible CPD Hours

Financial Reporting

ASPE - Review of the Standards
Available: Dec 15, 2019 Description: Page 48
Fee $785 PD Passport Valid – 2 Days 14 Eligible CPD Hours

ASPE - Strategic Investments
Available: Dec 15, 2019 Description: Page 48
Fee $450 PD Passport Valid – 1 Day 7 Eligible CPD Hours

ASPE - Update 2019
Available: Nov 21, 2019 Description: Page 49
Fee $225 PD Passport Valid – 1/2 Day 3.5 Eligible CPD Hours

IFRS - Review of the Standards
Available: Dec 15, 2019 Description: Page 50
Fee $785 PD Passport Valid – 2 Days 14 Eligible CPD Hours

IFRS - Update 2019
Available: Dec 15, 2019 Description: Page 50
Fee $225 PD Passport Valid – 1/2 Day 3.5 Eligible CPD Hours

IFRS 9 - Financial Instruments
Available: Dec 15, 2019 Description: Page 51
Fee $450 PD Passport Valid – 1 Day 7 Eligible CPD Hours

IFRS 16 - Leases
Available: Dec 15, 2019 Description: Page 52
Fee $450 PD Passport Valid – 1 Day 7 Eligible CPD Hours

NFPO - Review of the Standards
Available: Dec 15, 2019 Description: Page 53
Fee $450 PD Passport Valid – 1 Day 7 Eligible CPD Hours

Taxation

Corporate Tax - Review of Tax Planning
Available: Dec 1, 2019 Description: Page 128
Fee $785 PD Passport Valid – 2 Days 14 Eligible CPD Hours

Corporate Tax - Scientific Research & Experimental Development (SR&ED): Fundamentals
Available: Dec 1, 2019 Description: Page 128
Fee $225 PD Passport Valid – 1/2 Day 3.5 Eligible CPD Hours

GST/HST – CRA Audit
Available: Dec 15, 2019 Description: Page 131
Fee $450 PD Passport Valid – 1 Day 7 Eligible CPD Hours

Personal Tax - Review of Tax Planning
Available: Dec 10, 2019 Description: Page 140
Fee $785 PD Passport Valid – 2 Days 14 Eligible CPD Hours

PD AudioWeb On-Demand

PD AudioWeb are direct audio 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. 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), you can log into CPABC Online Services and go to your Professional Development History tab. The MP4 file, along with any available PDF handouts, will be downloadable in a zipped folder, and will be accessible right away if the AudioWeb title is already available. If the audio title is not yet available, you will receive a notification when it has been uploaded.

After you have finished listening to the audio file, you can return to the same online services tab 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 and Nexus Day sessions, and are eligible from 1 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.

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 & Management Accounting Titles

Lenders, Banking, and Your Client **Jun 2019 (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: U9515MB_OL 1/3 Passport Day $110

Review Engagements: Overview of CSRE 2400 **Sep 2018 (1.5)**
Presenter: Bridget Noonan
This session is designed to provide an in-depth 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 detailed examination of changes relative to the former standards.
Code: U9515AB_OD 1/3 Passport Day $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: U9526MB_OD 1/3 Passport Day $75

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: U9510AB_OD Free

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: U9512AB_OD 1/3 Passport Day $75

General Management Titles

A Practical Tool to Help You Deliver Polished Presentations Dec 2018 (1)
Presenter: Daphne Grey-Grant
Do you become anxious every time you are faced with making a presentation to your executive group, or, worse to a big crowd? Calm your nerves with an easy-to-use 7-step process that will make presentations a breeze. Even better, learn the skill of Mind Mapping to help generate new ideas and inspire you to prepare your presentation in record time.
Code: U9534MB_OD 1/4 Passport Day $45

Accommodating Disability in the Workplace Jul 2018 (1.5)
Presenter: Geoffrey Howard
This session will help participants understand employer obligations and rights when managing disabled employees in the workforce.
Code: U9539MB_OD 1/4 Passport Day $45

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: U9510MB_OD 1/3 Passport Day $75

Dispelling the Myth of "Effective Meetings" Jul 2018 (1)
Presenter: Tammy Towill
Assist your team in building meetings that are relevant, productive, engaging and yes, even welcomed by others in your organization. The session will explore the value and benefit of meetings, while challenging the structure of how these meetings are undertaken. You will better understand the impacts of individual communication styles and organizational culture on meetings.
Code: U9532MB_OD 1/4 Passport Day $45

Employment Standards Overview Jun 2019 (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: U9511MB_OD 1/3 Passport Day $110

Fostering Innovation & Entrepreneurial Thinking Dec 2017 (1.5)
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: U9528MB_OD 1/3 Passport Day $75

Handling Termination of Employment Dec 2019 (2)
Presenter: Geoffrey Howard
This session provides an overview of issues surrounding the termination of employment, and includes recent updates in the area.
Code: U9514MB_OD 1/3 Passport Day $75

How to Tackle the Difficult Conversation Nov 2018 (1.5)
Presenter: Lesley-Ann Marriott
Difficult conversations are an art and it is possible to embrace the challenge and overcome the anxiety a difficult conversation presents. This session will outline the simple process to prepare and approach all challenging conversations and provide brain science tips for creating positive interactions that transform even the most difficult conversations into stronger relationships.
U9540MB_OD 1/4 Passport Day $45

Influencing Without Authority Jul 2018 (1)
Presenter: Rob Gilfoyle
Leaders are recognizing that if they want to achieve results in this environment, they must be good at influencing others. This session will provide you with valuable influencing tools and techniques. Learn why being able to influence has become one of the most important leadership skills in the modern workplace, and how to influence in a professional and effective way.
Code: U9529MB_OD 1/4 Passport Day $45

Leadership in an Environment of Rapid Technology Change Jul 2018 (1)
Presenter: Carson McKee
In an increasingly automated workplace, technology is changing the concept of "what work is". The role of the employee and management structures are changing. Rapid technological change can produce fear, excitement and anxiety among people in your organization and even in yourself. This session provides a look at the current state and near-term future to help unpack and reframe these changes in order to develop successful organizational strategies for people management.
Code: U9537MB_OD 1/4 Passport Day $45

Leading Unique Individuals Jul 2018 (1.5)
Presenter: Barry Christiansen
Does your leadership style recognize and encourage diversity of thinking and approach from your team? Are you maximizing the benefits of a diverse team to deal with complex issues and create value-added solutions? How can you inspire innovation and spark creativity in teams? Experience a fun yet relevant session as you learn about the Insights Discovery framework and how your psychological preferences contribute to leadership and diversity in unique ways.
Code: U9531MB_OD 1/3 Passport Day $75

Mastering Leadership: What Type of Leadership is Needed to Drive Business Performance Today? Dec 2018 (1.25)
Presenter: Alex Wray
In an age of unprecedented change, leadership matters more than ever; but what does it actually look like? What rules still apply? This presentation offers a fresh lens through which to view leadership, based on compelling and conclusive research. Learn how to apply a more agile mindset when leading, 5 leadership competencies proven to be the greatest drivers of business performance and 3 behavioral patterns to avoid that most frequently erode a leader's impact.
Code: U9533MB_OD 1/3 Passport Day $75

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: U9516MB_OD 1/3 Passport Day $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: U9517MB_OD 1/3 Passport Day $75

Own Your Own Projects: Task Management for Powerful Results Jul 2018 (1)
Presenter: Scott Friesen
Do you have too much on your plate right now? Learn efficient ways to manage all of your commitments and work at your productive best. You'll learn how to break down overwhelming projects into manageable tasks and why prioritizing your work actually hurts productivity. Find out how to develop a daily routine to focus on your most important tasks and how to prevent procrastinations and achieve greater focus.
Code: U9538MB_OD 1/4 Passport Day $45

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: U9518MB_OD 1/3 Passport Day $75

Reframing Gender Equality Jul 2018 (1)
Presenter: Monica Murray
Gender equality, equal pay for equal work, and the Time's Up movement have been in the spotlight. This session is for everyone who is interested in the future of work and will explore why gender equality is good for business and how to improve it. You'll also learn the latest Canadian data on gender equality and pay equity.
Code: U9530MB_OD 1/4 Passport Day $45

Securing Your Organization's Future: Managing the Revolving Door of Succession Planning and Employee Retention Dec 2018 (1.25)
Presenter: Tammy Towill
This session will examine succession planning at every level, not just at retirement, and how to attract and retain employees, especially the millennial generation. We will explore tools and strategies for how best to mitigate these risks to ensure your organization's future stability and success.
Code: U9535MB_OD 1/3 Passport Day $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: U9524MB_OD 1/3 Passport Day $75

The Robots are Here: How Automation is Demanding that Soft Skills be our Competitive Advantage Dec 2018 (1)
Presenter: Casey Miller
AI, machine-learning, and robotics are automating everything from manufacturing to biotechnology. Accounting is not immune. With disruption impacting the future of work, what skills will be key to keeping our profession relevant? This session will highlight changes expected for our industry, and give insights into the human skills that will be most imperative now that the robots are here.
Code: U9536MB_OD 1/4 Passport Day $45

Top Employment Issues Affecting Your Bottom Line Dec 2019 (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: U9520MB_OD 1/3 Passport Day $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: U9521MB_OD 1/3 Passport Day $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: U9522MB_OD 1/3 Passport Day $75

Your People Strategy–Time for a Tune Up? Oct 2016 (1.5)
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: U9523MB_OD 1/3 Passport Day $75

Taxation & Wealth Management Titles

An Introduction to FAPI — **Nov 2019 (2)**
Presenters: Paul Dhesi, Kevin Too
The FAPI rules introduce a number of tax risks and reporting obligations. This seminar will help practitioners identify FAPI risks and learn ways to mitigate such risks. The session will use extensive examples to illustrate the concepts and tips and traps to be aware of in structuring foreign operations.
Code: U9542TB_OD — **1/3 Passport Day** — **$75**

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: U9510TB_OD — **1/3 Passport Day** — **$75**

BC PST Refresher & Comparison with GST/HST — **Mar 2019 (2)**
Presenter: Zaheer Jamal
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: U9533TB_OD — **1/3 Passport Day** — **$75**

BC Speculation and Vacancy Tax — **Mar 2019 (2)**
Presenter: Zheting Su
This session will cover the general structure, scheme, and application of BC's new Speculation and Vacancy Tax. The seminar leader will discuss major segments of the legislation, including the imposition of tax, various exemptions, key interpretive rules, and administration and enforcement. In addition, the seminar will provide guidance on how to navigate through the complex web of rules in the legislation.
Code: U9539TB_OD — **1/3 Passport Day** — **$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: U9511TB_OD — **1/3 Passport Day** — **$110**

Cash Savings Opportunities in a Fast-Paced World — **Oct 2018 (2)**
Presenters: Kevin Eck, Rod Hynes
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: U9527MB_OD — **1/3 Passport Day** — **$75**

Corporate Tax – Shutting Down the Corporation — **Nov 2019 (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: U9527TB_OD — **1/3 Passport Day** — **$110**

Creative Use of Partnerships in Tax Planning — **Jun 2019 (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: U9513TB_OD — **1/3 Passport Day** — **$110**

Employing Contractors and Contracting Employees: Sorting Out Tax and Legal Issues — **Jun 2019 (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: U9514TB_OD — **1/3 Passport Day** — **$75**

Essential Documents of any Successful Estate Plan — **Feb 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: U9517AB_OD — **1/3 Passport Day** — **$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 session contains 1.5 hours of ethics content.
Code: U9515TB_OD — **1/3 Passport Day** — **$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: U9535TB_OD — **1/3 Passport Day** — **$75**

GST/HST: Tips and Traps **Nov 2018 (2)**

Presenter: Ken Ghag

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: U9536TB_OD 1/3 Passport Day $75

Income Tax: BC Real Estate Tax **Jul 2019 (2)**

Presenters: Roque Hsieh, Henry Liao

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).

Code: U9540TB_OD 1/3 Passport Day $75

Income Tax - Starting Up a Business **Dec 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: U9528TB_OD 1/3 Passport Day $110

International Employees – Cross Border Tax and Social Security **Nov 2016 (2)**

Presenter: Ben Reah

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: U9517TB_OD 1/3 Passport Day $75

Introduction to Portfolio & Investment Management Techniques **Dec 2015 (1.75)**

Presenter: Tanner Philp

This session will provide an understanding of basic portfolio and investment management techniques. Learn the building blocks of portfolio and investment management used by professional advisors, and 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: U9518TB_OD 1/3 Passport Day $75

Legal Considerations for Death and Incapacity **Feb 2018 (2)**

Presenters: Christine Muckle, Genevieve Taylor

Learn what comprises a comprehensive plan for death and incapacity in the context of the Wills, Estates and Succession Act (WESA) and other recent legislative amendments. The Will is the foundation but other building blocks such as joint tenancy, beneficiary designation, and trusts can be used to achieve various goals. Incapacity planning is also a key element of any personal plan.

Code: U9519TB_OD 1/3 Passport Day $75

PD Nexus: Estate Planning Insights **Oct 2018 (9.25)**

Presenters: Stephanie Daniels, Sally Dennis, Kiu Ghanavizchian, Lisa Hamilton, Michelle Isaak, Kirsten Jenkins, Roger Lee, Sharon MacMillan, Florence Marino, Kate Marples, Sheryne Mecklai, Jason Moon, Cheyenne Reese, Richard Weiland, Janice Wells, Geoff White, Hugh Woolley

PD Nexus: Estate Planning Insights was a joint conference presented by CPABC and The Society of Trust and Estate Practitioners (STEP) Vancouver branch. It was designed for estate-planning practitioners. The series includes the following sessions

- The New Landscape: Recent Tax Changes Affecting Real Estate (1.5 hours)
- Tax and Accounting Implications of Probate Planning, Including Alter Ego and Joint Spousal Trusts (1 hour)
- U.S. Tax Cuts & Job Acts: The Impact on Estate Planning for Clients Who are U.S. Persons or Who Hold U.S.-Site Assets (1 hour)
- Estate Planning for First Nations Clients (1 hour)
- Life Insurance Update (1 hour)
- But What Does it All Mean? Practical Implications of the New Tax Rules (1.25 hours)
- How Vulnerable is the Discretionary Trust? (1.25 hours)
- The Shareholders' Agreement as a Tool to Facilitate Business Succession (1.25 hours)

Code: U9541TB_OD 1 Passport Day $220

PD Nexus: Financial Planning Insights **Dec 2017 (7.5)**

Presenters: Jamie Bonham, Andrea Frisby, Christine Muckle, Trevor O'Reilly, Shane Onufrechuk, Dominique Ramirez, Ian Robertson, Tracy Theemes, Chadwick Walker

Designed for professional accountants and other financial professionals who want to obtain insights into the topic area of financial planning, the series includes the following sessions:

- The Psychology of Investing (1.5 hours)
- Corporate Tax Planning for Private Enterprises (1.5 hours)
- The Essential Legal Documents of any Successful Financial Plan (1.5 hours)
- Ethical Based Investing - Panel Discussion (1.5 hours; this session contains 1.5 hours of ethics content)
- Planning Priorities at Different Life Stages & Financial Analysis for Retirement Planning (1.5 hours)

Code: U9534TB_OD 1 Passport Day $220

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: U9520TB_OD 1/3 Passport Day $75

Probate Fee Avoidance Planning **Nov 2019 (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: U9522TB_OD 1/3 Passport Day $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: U9525MB_OD 1/3 Passport Day $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: U9523TB_OD 1/3 Passport Day $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. This session will summarize these rules and discussion new ownership structures and other considerations for companies that are impacted by these rules. Note that this title has overlapping content with *Specified Corporate Income: The Long Reach of the new Rules.*
Code: U9524TB_OD 1/3 Passport Day $75

Specified Corporate Income: The Long Reach of the New Rules **Nov 2018 (1)**
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. This session will provide a high level overview of the rules and unexpected traps to watch out for, including common structures that are impacted by these rules and potential restructuring opportunities. Note that this title has overlapping content with *SBD Multiplication – Closing the Loopholes & the Impact on CCPCs.*
Code: U9538TB_OD 1/4 Passport Day $45

The Return of Foreign Exchange Volatility and How to Mitigate the Risks to Your Business **Dec 2018 (1)**
Presenter: Yoel Tewelde
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: U9516AB_OD 1/4 Passport Day $45

To Be or Not To Be: The Executor – Powers, Obligations & Liabilities **Nov 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. 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: U9529TB_OD 1/3 Passport Day $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: U9537TA_OD 1/2 Passport Day $75

On-Demand Archived Broadcasts

The following title is an archived video recording of a live streamed seminar. Each title qualifies for verifiable CPD hours upon successful completion of the quiz.

PD Nexus: Work Life Balance Insights **Jul 2019 (7)**
Presenters: Michelle Cederberg, Tammy Robertson, Paul Krismer
Learn how to develop personal strategies to increase productivity and achieve better life balance. The series includes the following sessions:

- Exposing the Myth of Life Balance (1.5 hours)
- The Time of Your Life – Lessons for Getting it Right (1.15 hours)
- Stress Defence: Combat Tips (1.15 hours)
- The Time is NOW – Make this Moment Matter (1.15 hours)
- The Serious Business of Positive Emotions (1.5 hours)

Code: U9551MA_OD 1 PD Passport Day $475

***The Time of Your Life, Stress Defence,* and *The Time is NOW* are also available for purchase individually – check our website for details.**

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.

September

Create Stunning Dashboards with Power BI Desktop
Excel Budgeting Techniques
Excel PivotTables for Accountants - Part I
Excel PivotTables for Accountants - Part II
Introduction to Power Query
Mastering PivotTable Calculations and Data Summaries
Mastering the Excel Macro Recorder
Office 2019 or Office 365 - Make the Right Decision
Power Query Tips, Tricks, and Advanced Techniques
Six Emerging Technologies for Accounting, Auditing, and Bookkeeping
Tech Update
The Right Stuff: Best Practices for Purchasing Technology
Top Excel Tips and Tricks
Understanding Key Internal Controls over Technology
Word Advanced Tips, Tricks, and Techniques

October

Adobe Acrobat DC - Big Changes for PDF
Advanced Excel Report - Best Practices, Tools, and Techniques
Blockchain and Other Emerging Technologies
Critical Excel Tools Everyone Needs to Know
Do It Yourself Business Intelligence
Everything Google
Going Virtual- Technology to Support Remote Team Members
Improving Productivity with Office 365
Mastering Excel Charts
Mastering PowerPoint for Effective Presentations
Microsoft Outlook - Inbox Organization and Optimization
Personal Technologies
Securing Your Data - Practical Tools for Protecting Information
Tech Tools and Gadgets for a More Efficient You!
The Best of the Best - Office Productivity Boosters
Understanding Key Internal Controls over Technology

November

Excel 2013-2019 - Best New Features for Accountants
Excel Tables - Database Technology Comes to Spreadsheets
Integrating Excel with Word and PowerPoint
PDF Tools for Productivity
Six Emerging Technologies for Accounting, Auditing, and Bookkeeping
Tales of True Tech Crimes
The Best of the Best - Office Productivity Boosters

December

Accessing and Cleaning Data with Excel, Power Query and Power BI
Data Consolidation and Combination in Excel
Introduction to Power Query
Introduction to the Excel Data Model
Mastering Advanced Excel Functions and Formulas
Powerful Data Analysis with PowerPivot
Powerful Reporting with Cube Formulas

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

Excel Modeling Fundamentals (previously Financial Modeling Fundamentals) Level 1

Learn tips and tricks for Excel model builders, how to audit your financial models, how to use better formulas, and how to monitor and handle uncertainty using scenario planning.

$180 2/3 Passport Day 4 CPD Hours

Financial Analysis Fundamentals Level 1

Learn 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 4 CPD Hours

Math for Corporate Finance Level 1

Learn 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

Behavioural Finance Fundamentals Level 2

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

Budgeting and Forecasting Level 2

Learn 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

Learn the many hallmarks that make financial models robust; best practice techniques in planning model structure; and 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

Learn to perform detailed business valuation modeling using three main methods: Comps, Precedents and DCF Analysis.

$180 2/3 Passport Day 4 CPD Hours

Excel Dashboards & Data Visualization Level 2

Learn how to build a custom Excel dashboard using professional data visualization techniques, and obtain 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

PowerPoint & Pitchbooks Level 2

Learn the most advanced functions, tips and best practices for presentation design to be a distinguished PowerPoint user.

$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

Advanced Excel Formulas Level 3

Learn the most advanced formulas, functions and types of financial analysis to be an Excel power user.

$60 1/3 Passport Day 2 CPD Hours

Corporate & Business Strategy Level 3

Learn the most important terminologies, theories, concepts, and frameworks on strategy and be guided through a comprehensive strategic analysis process.

$60 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 2 CPD Hours

Leveraged Buyout Modeling Level 3

Learn how to set up and build an LBO model step-by-step.

$250 1 Passport Day 6 CPD Hours

Mergers & Acquisitions: Advanced Modeling Level 3

This advanced course 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 4 CPD Hours

Mining Financial Model & Valuation Level 3

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

Real Estate Financial Modeling Level 3

Learn step-by-step, how to build a dynamic financial model that incorporates sensitivity analysis of development costs, sales prices, and other aspects of development.

$250 1 Passport Day 4 CPD Hours

Sensitivity Analysis for Financial Modeling Level 3

This advanced 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

Startup/eCommerce Financial Model & Valuation Level 3

Learn to build a startup financial model from scratch complete with assumptions, financials, valuation, and output charts.

$250 1 Passport Day 4 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

A Risky Business: Risk Management Tools for Professionals

Presenter: Jordan Wilson LEVEL Intermediate-Advanced

If identifying, assessing, and managing risk plays a crucial role in your daily life, then this course is for you. It aims to strengthen your business and investment risk knowledge, so that you can successfully identify, assess, and manage those risks in your career and personal affairs. The content assumes you do have some knowledge on the topic of risk. Jordan Wilson and a few industry experts discuss business and investment risk a little deeper and from slightly different perspectives than what you might have dealt with previously.

$110 1/2 Passport Day 2 CPD Hours

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 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.

$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. Learn the red flags through real 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 and safeguarding your information.

$110 1/2 Passport Day 2 CPD Hours

Avoiding Investment Fraud

Presenter: Kelley Keehn LEVEL Introductory

Would you have been duped by Bernie Madoff of Earl Jones? Would your client's have been swindled? Award winning and best-selling author, Kelley Keehn, will guide listeners through the often-devastating world of investment scams. Learn the trends of investment frauds, hear from government officials and experts that are at the front lines. You will find out the red flags so you can teach your clients, family and friends how to protect themselves so they don't fall victim to this growing crime.

$60 1/4 Passport Day 1 CPD Hours

Client Acquisition: Ethical Strategies for Attracting and Retaining Great Clients

Presenter: Bruce Fern LEVEL Intermediate

This course is for accounting professionals who want to improve their skills in engaging with clients or customers, including how to proactively manage the client acquisition cycle to attract more of the right clients, more quickly. Learn effective client acquisition techniques and how to apply proven client acquisition practices in a way that is consistent with the International Code of Ethics for Professional Accountants. **This seminar contains 1 hour of ethics content.**

$110 1/2 Passport Day 2.5 CPD Hours

Conversations in the Boardroom, Conversations in the Hallway

Presenters: Brian Friedrich & Laura Friedrich LEVEL General

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. **This seminar contains 2.5 hours of ethics content.**

$110 1/2 Passport Day 2.5 CPD Hours

Leading Digital Transformation (formerly 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 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

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". 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

Lies, Alternative Facts and Professional Skepticism

Presenters: Brian Friedrich & Laura Friedrich LEVEL Intermediate

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

Employee engagement is an important issue for those in Human Resources Management and in leadership roles. 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. 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

CPABC FALL PACIFIC SUMMIT | SEPTEMBER 25-27, 2019

Be inspired, learn best practices, and make new contacts at the Fall Pacific Summit. It will feature:

- The opportunity to gain up to 15.5 CPD hours, including 4 hours of verifiable business ethics.
- Top-rated sessions from the Spring Pacific Summit.
- Exclusive networking events where you can meet CPAs from every industry and career level.

Keynote Speakers

Lee-Anne McAlear

Innovation Specialist and Program Director, York University

Lee-Anne McAlear is a highly regarded innovation specialist who helps Fortune 500 companies around the globe adopt a reliable, strategically focused approach to innovation and change management.

Dan Pontefract

Leadership Strategist and CEO, The Pontefract Group

Dan Pontefract is the founder and CEO of The Pontefract Group, a firm that improves the state of leadership and organizational culture. He is a renowned speaker, best-selling author, and is also an adjunct professor at the Gustavson School of Business.

Register as a group of 3 or more from the same company to save an additional 10%.

Registration closes September 9. Register today to reserve your spot!
Visit **bccpa.ca/pacificsummit**.

CHARTERED PROFESSIONAL ACCOUNTANTS CANADA
COMPTABLES PROFESSIONNELS AGRÉÉS CANADA

Professional Development from CPA Canada

The ONE National Conference 2019
September 23-24, 2019 | Montreal, QC
Pre- and post-conference workshops available
theone.cpacanada.ca | #CPATheONE

FINANCIAL REPORTING

CONFERENCES

Conference for the Oil and Gas Industry
November 26-27, 2019
cpacanada.ca/oilgas

Conference for Audit Committees
December 9-10, 2019
cpacanada.ca/cfac

IN-PERSON COURSE

In-Depth Brokers and Investment Dealers
Oct 28-29, 2019 | Toronto, ON
cpacanada.ca/brokers

ONLINE LEARNING

Look Out, the Auditors Are Coming
cpacanada.ca/auditorsarecoming

LEADERSHIP & MANAGEMENT

CERTIFICATE

Emerging Leaders Certificate Program
cpacanada.ca/emergingleaders

ONLINE LEARNING

Leading Organizations From a People Perspective
cpacanada.ca/leadingorgs

Success Podcast Series:
Leadership and Performance Measurement
cpacanada.ca/pmpodcast

TRANSFER PRICING

IN-PERSON COURSE

In-Depth Transfer Pricing
Fall 2019
cpacanada.ca/transferpricing2

ONLINE LEARNING

Introduction to Transfer Pricing
cpacanada.ca/transferpricing

SPECIALTY PRACTICE AREAS

Offered in conjunction with AICPA

CONFERENCES

AICPA Women's Global Leadership Summit
November 6-8, 2019
San Diego, CA or attend virtually

AICPA Forensic and Valuation Services Conference
November 4-6, 2019
Las Vegas, NV or attend virtually

CREDENTIALS

Certified in Financial Forensics (CFF®)
cpacanada.ca/cff

Certified Information Technology Professional (CITP®)
cpacanada.ca/citp

NOT-FOR-PROFIT

CONFERENCE

Not-for-Profit Forum
February 10-11, 2020
Vancouver, BC or attend virtually
cpacanada.ca/nfpforum

CERTIFICATE

Not-for-Profit Certificate Program
cpacanada.ca/nfpcertificate

ONLINE LEARNING

Auditing Not-for-Profit Organizations
cpacanada.ca/auditnfps

The Compliance Life Cycle:
NFPOs and Registered Charities
cpacanada.ca/compliancelifecycle

INDIRECT TAX

CONFERENCE

Commodity Tax Symposium
October 23-24, 2019
post-conference workshop on Oct. 25
Ottawa, ON or attend virtually
cpacanada.ca/cts

ONLINE LEARNING

GST/HST
cpacanada.ca/gsthst

INCOME TAX

CONFERENCE

Scientific Research and Experimental Development Symposium
November 19, 2019
Toronto, ON
cpacanada.ca/sred2019

IN-PERSON COURSES

In-Depth Tax Course
Fall 2019
cpacanada.ca/indepthtax

Income Tax for the General Practitioner
WEST: Nov 16-21, 2019 | Banff, AB
EAST: Nov 30-Dec 6, 2019 | Blue Mountain, ON
cpacanada.ca/itp

In-Depth Tax Issues for the Owner-Managed Business
November 9-13, 2019 | Banff, AB
cpacanada.ca/tiomb

In-Depth Corporate Reorganizations
November 9-13, 2019 | Blue Mountain, ON
cpacanada.ca/corporatereorg

ONLINE LEARNING

Accounting for Income Taxes
Capital Gains: A Comprehensive Review
Estates and Trusts
Ethics and Tax
Introduction to the Canadian Income Tax Act
Overview of Canadian Tax and Law
Partnership Tax Issues
Safe Income and Safe Income On Hand
U.S. Corporate Tax for the Canadian Tax Practitioner
U.S. Personal Tax for the Canadian Tax Practitioner

ETHICS

ONLINE LEARNING

Ethics and Tax
Ethical Principles and the Accounting Profession: Code Decoded
Ethics for the Auditor
Ethics for the Consultant
Ethics for the CFO
Success Podcast Series: Ethics and Governance
cpacanada.ca/ethics

MANAGEMENT ACCOUNTING

CERTIFICATE

Performance Management and Strategy Certificate
cpacanada.ca/performance

ONLINE LEARNING

The Business Model Canvas: Strategy and Innovation
cpacanada.ca/businessmodel

Building a Dynamic Scenario-Based Forecast
cpacanada.ca/scenario

Executing Performance Through Strategy Mapping
cpacanada.ca/strategymap

Effective Operational Planning and Budgeting
cpacanada.ca/budgeting

Pricing and Customer Profitability
cpacanada.ca/pricing

PUBLIC SECTOR

CONFERENCE

Public Sector Conference
October 28-29, 2019
Post-conference workshops on Oct 30
Ottawa, ON or attend virtually
cpacanada.ca/psc

CERTIFICATE

Public Sector Certificate Program
cpacanada.ca/pscertificate

ONLINE LEARNING

Effective Operational Planning and Budgeting in the Public Sector
cpacanada.ca/PSplanning

Public Sector Financial Reporting and Accounting
cpacanada.ca/PSreporting

Public Sector Financial Management
cpacanada.ca/PSfinancial

Evidence-Based Decision Making in the Public Sector
cpacanada.ca/PSevidence

TECHNOLOGY

CONFERENCE

National Technology Forum 2020
Spring/Summer 2020
Toronto, ON
cpacanada.ca/techforum

CERTIFICATE

Cybersecurity Frameworks Certificate
cpacanada.ca/cyber

Data Management Certificate
cpacanada.ca/datamanagement

Excel Certificate Program
cpacanada.ca/excelcertificate

ONLINE LEARNING

The ONE 2018 podcast series:
Technology and leadership
cpacanada.ca/theonepodcast2018

Success Podcast Series: IT and Innovation
cpacanada.ca/itpodcast

Cross-functional collaboration to deliver critical goals
http://cpacanada.ca/crossfunctional

Events, dates and locations subject to change.
FOR ALL PROFESSIONAL DEVELOPMENT OFFERINGS, VISIT: cpacanada.ca/pd2019

Seminar Leaders

We are proud to introduce our instructors for the Fall 2019/Winter 2020 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 partner at the Vancouver office of Thorsteinssons LLP, Tax Lawyers, 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.

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.

JIM BROSSEAU is passionate about rethinking traditional team practices for today's diverse world - to be practical, situationally relevant, and adaptable. He sees the leadership role as one that intentionally cultivates an environment that brings out the strengths of everyone in the team. Jim brings a technology background and wide experience with government, non-profits, manufacturing and service-based teams. His primary focus is collaborative project leadership, and the power of aligning diverse perspectives into strong, cohesive teams. Jim has written two books, focused on technical teams and developing personal resilience.

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.

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.

JOHN DEMETRI, CPA, CA, CPA (ILLINOIS) is a senior manager in the tax practice at Wolrige Mahon Collins Barrow LLP's Vancouver office. John has over 10 years' experience in cross-border tax issues with a focus on cross-border tax planning, Canadian and U.S. tax compliance and international assignment program management.

TAMMY DEWAR combines a Ph.D. in adult learning and a professional coaching certification with 20 years of practical leadership and team development experience. She is a "pracademic", spending part of her time teaching at Royal Roads University in their Master's and Executive Leadership programs and the other part of her time as a facilitator and coach helping organizations develop their leadership capacity. She provides engaging, creative and practical training programs, facilitates strategic planning and innovation processes, and coaches teams and executives.

PAUL DHESI, CPA, CA is a Partner in the International Tax Services practice of PricewaterhouseCoopers LLP working in the Vancouver office. His experience includes cross border structuring, implementing cross-border financing strategies, double tax treaty interpretation, the Canadian foreign affiliate taxation regime and minimizing the taxation on cross border cash flows. He prides himself on utilizing his deep knowledge in Canadian tax to develop effective cross border tax structures that integrate both Canadian and foreign tax laws.

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.

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.

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WYNN VO, CPA, CA is a Senior Manager with KPMG Canada's International Corporate Tax practice in Vancouver. She has 13 years of professional experience, with 11 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, PCC is an Associate with Learning Strategies Group. She holds the Professional Certified Coach designation and is a trainer facilitating workshops primarily in leadership development, 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.

ROSANNE WALTERS, CPA, CA, CBV, CFE is the President of Walters Financial Forensics Ltd. She has over 25 years experience in fraud investigations for various purposes including insurance recovery, civil claims and criminal prosecutions. She also has experience assisting clients with fraud prevention including fraud risk assessments and implementation of controls to deter and detect fraud. Rosanne has qualified as an expert witness and given testimony in the Supreme Court of British Columbia on fraud-related matters.

IAN WANKE, CPA, CA, CFA, CBV works within the Private Equity team at British Columbia Investment Management Corporation (BCI), where he and his colleagues invest in privately held, global companies. BCI is a Victoria based asset management firm with more than $140 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.

DAVE WHITTINGTON, PHD has a background in science, engineering and education and has a PhD in computer science. It became to clear to him that human factors such as open communication, team work, innovation and leadership were critical, in addition to having technical expertise. Dave's been an associate faculty member at Royal Roads University since 2001 and teaches in the MA Leadership, Graduate Certificates in Workplace Innovation and Project Management and various Executive Leadership programs. Dave has a particular interest in systems thinking and design thinking.

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.

FRANCIS WONG, CPA, CA, is a partner in KPMG's Vancouver Enterprise tax practice. He provides tax services to private businesses and advises them and their shareholders on a variety of tax matters, including estate planning, corporate reorganizations, and cross-border investment planning. Francis also assists with tax planning and tax compliance matters for companies investing into and out of Canada.

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 a Partner at KPMG Law LLP and KPMG Canada, 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, federal Excise Tax and Customs voluntary disclosures, audits, adjudications, objections and appeals. She has also represented clients in appeals and judicial review applications before various levels of court.

KEVIN ZHAO is Senior Associate, M&A Advisory, Financial Advisory at Deloitte LLP. Kevin is an experienced M&A specialist providing divestiture advisory services for private mid-market businesses and buy-side and sell-side transaction due diligence for financial sponsors and strategic companies both public and private. He has ongoing and past transactional experience in the food & beverage, computer software technology, consumer products and services, manufacturing, real estate, aerospace and mining industries.

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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

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.

19 - ________________

SUB-TOTAL

5% GST (GST No. 107508541)

TOTAL

PD PASSPORT

TO ORDER A PD PASSPORT (A savings program for people who take multiple PD Seminars - for more information see page 7 or pd.bccpa.ca)

Personal PD Passport: Qty ________ x $1,650 = ______________

Flexi PD Passport: Qty ________ x $2,050 = ______________

SUB-TOTAL

5% GST (GST No. 107508541)

TOTAL

PD PASSPORT ORDERS: All PD Passport Orders, (for both members and non-members), MUST be accompanied by payment to be processed. Please fill out the "METHOD OF PAYMENT" section below.

The undersigned has read, understood and agrees to be bound by the Terms and Conditions of the PD Passport as outlined on page 181.

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

CLASS LIST

CPABC distributes classlists with your name and organization name at the seminar.

VIDEO/PHOTOGRAPHY

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

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 2019-2020 PD Passports are valid on CPABC PD passport valid seminars taking place between September 1, 2019 to August 31, 2020. 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 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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