CHARTERED PROFESSIONAL ACCOUNTANTS
BRITISH COLUMBIA

Professional Development

NEW PERSPECTIVES

FALL | WINTER 2020

MESSAGE FROM CPABC'S PD DEPARTMENT

Welcome to the Fall/Winter 2020-21 CPABC PD Catalogue

At a time when there is so much uncertainty due to the COVID-19 pandemic, CPABC is pleased to continue to offer our members a robust PD program for Fall/Winter 2020-21. As always, our professional development (PD) program is filled with topics you have come to expect, from tax, assurance, financial reporting and financial management to technology, leadership, team building, strategy and governance, and much more.

The pandemic has shifted how businesses operate in the short- and long-term. From a learning perspective, we appreciate that some members prefer learning in-person; however, given physical distancing restrictions imposed by the province, the Fall/Winter program will continue primarily in a virtual format. Feedback from members who completed virtual seminars this summer rated their overall learning experiences equivalent to in-person offerings. If you have not already experienced virtual learning, we encourage you to try it out! Many members enjoyed the online learning experience so much that they've indicated that virtual learning is their new preferred approach to attending CPABC PD offerings.

Besides virtual live offerings, where you can interact with the instructor and other participants in real-time through chats and other interactive tools, CPABC's PD program continues to provide a wide array of online on-demand content that can be purchased and viewed anytime, anywhere. We are also expanding our online learning provider partners, learn more about our partner providers on page 69.

CPABC's PD Passports continue to be one of the most economical ways to acquire quality PD. This Fall/Winter, CPABC continues to offer the personal and flexi passports which provide holders with approximately six days of PD. New this year, we are introducing a new mini passport that offers approximately three days of PD. Learn more about our PD Passport program on page 57.

Keeping access to quality PD is important during the pandemic, CPABC is pleased to announce price reductions across all passports and most virtual and on-demand products for the coming Fall/Winter. You can learn more about these cost savings on page 72.

Thank you for being a valued member of our CPABC PD community.

CPABC Professional Development Team

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Maximize Your Learning: The remodeling of PD Passports & introduction of a Mini Passport!

The CPABC PD Personal and Flexi Passports will remain your most cost effective savings program but will be undergoing a change beginning this September. The passport measurement unit will **shift from "days" to "credits"** to help better align passport units to the learning value of in-person and online seminar options.

Passport credits are based on the type of learning value they can provide rather than duration. Passports are eligible for a **10% discount** this year.

PASSPORT DAYS → PASSPORT CREDITS = MORE FLEXIBILITY

We are also excited to introduce the addition of the **PD Mini Passport** for the 2020-21 PD Year! We understand that some of our members may need to consume PD seminars in slightly smaller portions each year, and this Mini Passport was designed with that in mind.

» **NEW** For more information on the remodeled PD Passports and the new Mini Passport, please see page 58.

Expand Your Knowledge with our Virtual PD Nexus Days

Register early, as our fall PD Nexus Days will sell-out. Don't miss our **Diversity, Equity, and Inclusion Insights** (November 26) featuring Agapi Gessesse, Executive Director, CEE Centre for Young Black Professionals, as she focuses on bringing racial diversity to corporate Canada. Public practitioners, learn the latest technologies and share best practices at our **Public Practice Insights** (November 18), stress proof your brain and become more resilient with Terry Small, the brain guy.

Back by popular demand, our full-day **Business and Innovation Insights** (December 9) will delve into the skills CPAs need in the 'new normal'; featured speakers include the BC Business Council's Ken Peacock with an economic update and Executive Finance's Blair Cook and Jennifer Nicholson and their perspectives on the future of finance after COVID-19.

» **READ MORE** Reduce your stress with tips from PD Nexus' Public Practice Insights plenary speaker, Terry Small.

New Seminars for Fall/Winter 2020

Looking for new titles? Don't miss these new seminars in our Fall/Winter professional development program.

Accounting & Assurance

- Compilation Engagements - Application of the New CSRS 4200
- IFRS - Essentials
- Practical Tips for Government Accountants
- Taking Financial Statement & Ratio Analysis to the Next Level

Information & Business Technology

- Remote Access for Small Businesses

People Management & Personal Development

- Creative Leadership: Bringing Innovation to the Workplace
- Enhancing Your Influencing Strategies
- Essential Skills for Managers
- High Performing Team Member
- Improving Collaboration on Remote Teams for Better Teamwork, Engagement and Performance
- Leading Self and Emotional Intelligence
- Managing Transitions: Leading the People Side of Change
- Negotiation Skills
- Project Management
- Setting Concrete Goals and Metrics
- Stress Management

Strategy, Governance, Risk & Human Resource

- Developing Meaningful KPIs
- Emerging Areas of Focus and Practice for Boards of Directors
- Improving Governance in Smaller Not-for-Profit Entities
- Improving your Bottom Line Using KPIs

Taxation

- CCPCs – The New Hurdles
- Tax in Troubled Times

Wealth Management

- Everything You Need to Know about Government, Bank and Personal Debt

New Certificate Program for Fall/Winter 2020

Resilient Leadership Certificate Program

(Five modules)

- Balance Life, Work and Overwhelm
- Energize Your Team Through Uncertainty
- Five Qualities of a Leader Who Thrives in a Crisis
- Manage Your Mindset and Emotional Well-being
- Who's Listening?

» LEARN MORE Go to page 38 to learn more about this program

Expanded Online Learning Options: New e-learning partners

CPABC is pleased to expand our online course options through new partnerships with LumiQ, Executive Finance, CPA Crossings, and Business Learning Institute (BLI). Together, these partnerships will enrich CPABC's inventory of on-demand, web-based learning with quality courses and topics tailored to accounting and finance professionals. Information on specific courses and topics is available on our PD website.

For more information on all our third party e-learning partners, please see page 69 & 70.

Searching on our website?

Use the Keywords search field and type "LumiQ", "Executive Finance", "CPA Crossings", or "BLI". Existing partners include "CFI", "K2E", and "ProDio".

Zooming Ahead with Professional Development: A New Perspective on Online Learning

In March, CPABC's Professional Development Team faced a sudden need to adapt to COVID-19 realities. As we addressed this challenge, we remained committed to our goal of providing professional development opportunities to our members – here's a snapshot of the program's successful transition from April to August, 2020.

Successful Transition to Virtual Learning

CPABC PD Live Webinars
April-August, 2020

210

Number of registrations
April-August, 2020

6,220

Average course rating

4.23/5.0

Highest course rating

4.83/5.0

Online Learning for Members

A recurring concern among members about virtual seminars is, "It's just not as effective." But while some had initial reservations, others experienced a change of heart after attending a virtual session.

Maria Perez (Daiya Foods Inc., Controller) was concerned about how much value she could obtain from an online course, but after completing *Controller's Management Skills* via Zoom, she was pleasantly surprised. "It was a unique experience and I find it more productive than in-person learning. I was able to focus and concentrate more," she noted.

Lisa Moore (Hy-Tech Drilling Ltd., Controller) was also apprehensive, but found the experience very positive, saying, "I almost liked it better than attending in-person. I found it really effective. The combination of teaching and breakout room case studies was a great mix."

Mike Lewis (Tolko Industries Ltd, Woodlands Controller) was hesitant to proceed with his course at first, but discovered the Zoom platform worked very well. "The course met and exceeded my expectations," he said.

Other member feedback we've received on virtual PD:
"I got more out of the online presentation than I would have in an in-person presentation because there were no distractions and I didn't have to travel."

"This approach is efficient and convenient. We can participate at home, at our workplace, anytime, anywhere."

"First time on Zoom and it worked well. Easy to use and speaker and PowerPoints were well hosted and easy to read and listen to."

Due to on-going public health and safety restrictions:

- The majority of our Fall/Winter 2020-21 seminars will be virtual classes.
- We will offer approximately 10% of our live program through limited-seating, in-person seminars until at least the end of March 2021.
- Should health authorities once again restrict in-person gatherings, conversion to virtual offering will be made wherever possible.

We've been asking:

"Would you attend more Zoom seminars in the future?" In our seminar feedback form, 82.4% of attendees indicated they would.

Seminar Schedule
PD Passports
Nexus Days
Executive Programs
Certificate Programs

Zooming Ahead (continued)

Online Facilitating for Instructors

Our instructors have been diligently redesigning their course content and presentation style for online delivery. Some have broken down their courses into shorter segments presented over multiple days, while others have embraced breakout rooms and chat, all in an effort to create a better and more engaging learning environment.

Enterprise Risk Management Fundamentals instructor Bill Wesioly says that technology was a top concern when pivoting his course to online delivery. He asked himself, "Would there be problems? Would we need to spend time with participants who might have their own technical issues?" Bill resolved to "practice, practice, practice," and was able to run the program smoothly. He believes that we need to embrace this new learning environment, "because we are not going back to traditional classrooms anytime soon."

Online Seminar Hosting for CPABC PD Staff

CPABC PD is working hard to ensure that our attendees receive the best possible experience at our webinars – here is some of what they do:

- discuss with each facilitator the viability of converting their courses to virtual offerings;
- hold Zoom walkthroughs with the majority of facilitators, clarifying and demonstrating features;
- review facilitators' presentation needs; and
- provide a mock audience for short practice sessions.

Staff are also on-hand at every Zoom live webinar, providing support to both instructors and attendees.

What about in-person classes?

We understand that some members prefer in-person learning, and we will schedule approximately 10% of our Fall/Winter program as in-class sessions. Ensuring that public health guidelines are met is a top priority.

Facilities: We will be engaging a very small number of venues in Vancouver, and will work with them to ensure larger meeting room sizes with limited seating capacities, safe practices with regards to room setup and food service, clear markings and signage in walkways, and easy access to hand sanitizing stations.

PD Staff: CPABC staff will be on-site before the seminars begins and will ensure registrants are properly checked in with as little contact as possible. They will answer any questions on logistics.

Course Materials: In order to limit the number of touchpoints and further reduce safety risks, all course materials will be available electronically (PDF) only.

Should health authorities once again restrict in-person gatherings, conversion to virtual offering will be made wherever possible. ■

» WANT TO LEARN MORE ABOUT PD SEMINARS VIA ZOOM?
Review basic tips on security and features, or read the Zoom Attendee Guide produced by the CPABC PD team.

7 Helpful Tips for Attending Live PD Webinars

1. Do a test meeting prior to the webinar. Test your audio and check audio output and input.
2. Type questions and comments in the Chat window. Some webinars encourage verbal discussions so will require a microphone. If your device does not have one, you can dial-in by phone.
3. Download your course material prior to the webinar.
4. Join the webinar 10-15 minutes early to allow for troubleshooting.
5. Lagging video/audio may be caused by an unstable internet connection or having too many programs running. Close unnecessary programs, check your internet connection, or re-join the meeting.
6. Use Zoom features to easily mute/unmute your mic, or to turn your camera on/off.
7. Using other Zoom features such as Chat and Reactions will increase interactivity.

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ACCOUNTING & ASSURANCE

AUDIT & ASSURANCE

Assurance - Compliance with Agreements, Statutes and Regulations This seminar covers the CPA Canada Handbook requirements for engagements to audit or review compliance of financial or non-financial information with agreements, statutes, laws or regulations.	Online Video On-demand	3.5 Hours	Archived
Audit - Update 2020 Auditors require continual knowledge of changing standards and practice issues. This seminar reviews recent revisions to the CPA Canada Handbook–Assurance and other practice matters that have occurred over the last year.	Nov 06 Dec 09 Feb 11	9am-12:30pm 9am-12:30pm 9am-12:30pm	Live Webinar Live Webinar Live Webinar
Audit Engagements - Application of the Standards Using PEG This course provides practical guidance on how to perform effective and efficient small-to-medium-sized audit engagements, including those for not-for-profit entities, using the audit methodology contained in Volume 2 of the Professional Engagement Guide (PEG).	Nov 02 Feb 17	9am-5pm 9am-5pm	Live Webinar Live Webinar
Audit Engagements - Audit of a Simple Entity It can be challenging at times to understand how to apply certain Canadian Auditing Standards to a simple entity in an efficient and effective manner. This seminar will help auditors to better understand and apply Canadian Auditing Standards (CAS) requirements in this context. Key concepts of CAS and their application will be reviewed, taking into consideration unique characteristics of a simple entity.	Dec 04 Feb 04	9am-5pm 9am-5pm	Live Webinar Live Webinar

» **NAVIGATE** Browse the Fall/Winter catalogue by clicking on the seminar subjects above, or go to specific CPABC programs, such as Nexus Days, Executive Programs, or Certificate Programs by clicking on the programs listed to the right running vertically.

Seminar Schedule
PD Passports
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Audit Engagements - CAS 240: Risk Related to Fraud The requirements of Canadian Auditing Standards (CAS) are designed to assist the auditor in identifying and assessing the risk of material misstatement due to fraud and in designing procedures to respond to and detect such misstatements. This seminar helps participants identify the auditor's responsibilities related to fraud and apply the standards when designing and performing procedures for audit engagements.	Nov 09	9am-12:30pm	Live Webinar
Audit Engagements - Review of the Standards This seminar provides a solid foundation in the practical application of the Canadian Auditing Standards (CAS) to audit engagements. Using a case study approach, the course reviews key CAS requirements, including the new requirements in CAS 540 – Accounting Estimates and Related Disclosures. This seminar will emphasize areas identified as common pitfalls by CPA national practice inspection findings.	Two-segment Dec 02 & Dec 07	9am-5pm	Live Webinar
NEW **Compilation Engagements - Application of the New CSRS 4200** This course will update practitioners on the new standard for compilation engagements (CSRS 4200) so that they will have a working knowledge of the standard for application in their practices. This seminar will include hands-on opportunities to review application of the standard to different scenarios, and comparison to the previous standard and to other non-assurance standards.	Oct 19 Oct 29 Nov 12 Nov 24 Dec 10 Feb 23 Mar 04	9am-5pm 9am-5pm 9am-5pm 9am-5pm 9am-5pm 9am-5pm 9am-5pm	Live Webinar Live Webinar Live Webinar **In-Person, Vancouver** Live Webinar Live Webinar **In-Person, Vancouver**

Compilation Engagements - Overview of the New Standard (CSRS 4200) The new compilation engagement standard, Canadian Standard for Related Services (CSRS) 4200, has some significant differences from the previous standard. This seminar will provide a detailed overview of this new standard and its impact on the planning, implementation, and documentation of a compilation engagement.	Oct 19 Oct 26 Nov 09 Nov 25 Dec 02 Dec 14 Feb 08 Feb 10 Mar 12	9am-12:30pm 9am-12:30pm 9am-12:30pm 9am-12:30pm 9am-12:30pm 9am-12:30pm 9am-12:30pm 9am-12:30pm 9am-12:30pm	Live Webinar **In-Person**, **Vancouver** Live Webinar Live Webinar Live Webinar Live Webinar Live Webinar **In-Person**, **Vancouver** Live Webinar
Compilation Engagements - Review of Section 9200 This online seminar provides an overview of the existing CPA Canada Handbook – Assurance Section 9200 relevant to compilation engagements, with practical examples of different approaches to completing and documenting compilation engagements under the existing standard. Note: Any compiled financial statements ending on or after December 14, 2021 should follow the new standards under CSRS 4200.	Online Video On-demand	3.5 Hours	Archived
Fraud Happens - What to Do When You Suspect Fraud A rational reaction plan is critical to responding appropriately to concerns about fraud and related inappropriate conduct. This seminar will provide best practices for conducting an organized financial investigation, and will guide participants through the many challenges that companies face, including using real-life examples of fraud.	Dec 07	9am-5pm	Live Webinar
Quality Control - Review of CSQC1 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 help sole practitioners and small firms understand the requirements of the standard and how the requirements may be applied in a small firm environment.	Online Video On-demand	3.5 hours	Archived

Review Engagements - Application of the Standard Using a case study approach, this course allows those already familiar with CSRE 2400: Review Engagements to deepen their knowledge of the standard and its application.	Nov 18	9am-5pm	Live Webinar
Review Engagements - Overview of the Standard CSRE 2400, Engagements to Review Historical Financial Statement is the current standard for review engagements in Canada. This webinar provides an overview of this standard and its application. Note, for a deeper dive in the application of the standard, one should also look at the "Review Engagement - Application of the Standard" course.	Online Video On-demand	3.5 hours	Archived
Review Engagements - Specific Topics There are some areas where the application of CSRE 2400 – Review Engagements can be challenging. This course builds upon fundamental knowledge of the CSRE 2400 – Review Engagements Standards and addresses areas that commonly prove more challenging for practitioners.	Nov 16	9am-5pm	Live Webinar

FINANCIAL REPORTING

ASNFPO - Update 2020 Accounting professionals working in the not for profit sector require an understanding of changes occurring to the accounting standards that govern that sector. This seminar will review recent and proposed revisions to Part III - Accounting Standards for Not-for-Profit Organizations (ASNFPO) and Part II - Accounting Standards for Private Enterprises where applicable for NFPOs.	Nov 05 Nov 25 Feb 19	9am-11am 1pm-3pm 9am-11am	Live Webinar Live Webinar Live Webinar
ASPE - Comparison to IFRS 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.	Nov 03	9am-5pm	Live Webinar

ASPE - Disclosure and Presentation This seminar reviews the realities and best practices for disclosure and presentation requirements of Part II - Accounting Standards for Private Enterprises (ASPE).	Nov 23	9am-5pm	Live Webinar
ASPE - Real Estate Industry Under Accounting Standards for Private Enterprises (ASPE), real estate entities encounter unique financial reporting issues. This practical seminar will use realistic exercises and examples to illustrate these issues for professionals working in the industry, including both developers and investors.	Oct 23 Jan 16	9am-5pm 9am-5pm	**In-Person**, **Vancouver** Live Webinar
ASPE - Related Party Transactions Accounting for related party transactions is one of the most complicated areas to apply Accounting Standards for Private Enterprises (ASPE) and it is an area of accounting regularly cited for deficiencies by practice inspection. This seminar will address challenges that can arise with respect to the recognition, measurement, presentation, and disclosure of related party transactions and balances under ASPE.	Nov 13	9am-5pm	Live Webinar
ASPE - Review of the Standards This two-day seminar reviews the standards in commonly used sections of Part II – Accounting Standards for Private Enterprises (ASPE), and discusses other aspects of the standard. In addition, this seminar identifies and outlines the accounting policy choices available to management for applying ASPE.	Two-segment Nov 06 & Nov 13	9am-5pm	Live Webinar
ASPE - Strategic Investments If you or your clients have subsidiaries, significantly influenced investees, or investments in joint arrangements, then this seminar is not to be missed. This seminar explores the various options within ASPE for accounting for strategic investments, and their impacts.	Online Video On-demand only	7 hours	Archived

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ASPE - Update 2020 Keeping up with changing accounting standards can be challenging. This seminar will review recent revisions to Part II - Accounting Standards for Private Enterprises (ASPE), starting with an overview of the changes, followed by specific examples detailing their implementation.	Oct 20 Nov 20 Dec 15 Jan 20 Mar 05	9am-12:30pm 9am-12:30pm 9am-12:30pm 9am-12:30pm 9am-12:30pm	**In-Person, Vancouver** Live Webinar Live Webinar Live Webinar Live Webinar
Compiling Financial Statements This course explores fundamental accounting concepts, as well as corporate tax concepts, that serve as a background for determining an appropriate basis of accounting for compiling financial statements. This course also serves as an introduction to the financial reporting concepts included in the CPA Handbook – Accounting.	Nov 09 Feb 05	1:30pm-5pm 9am-12:30pm	Live Webinar Live Webinar
IFRS - Disclosure and Presentation This seminar will provide participants with an overview of Part I – International Financial Reporting Standards (IFRS) related specifically to the presentation of all the statements and related note disclosures for all areas.	Four-segment Oct 26-Oct-29	9am-12:30pm	Live Webinar
NEW **IFRS - The Essentials** This seminar will cover the essentials of International Financial Reporting Standards (IFRS) but not all of the technical details required for implementation. The seminar is aimed at participants who want to know what IFRS is about but do not have to implement the standards and understand all of the technical details.	Dec 04	9am-12:30pm	Live Webinar
IFRS - Review of the Standards This seminar focuses on general CPA Canada Handbook Public Sector Accounting Standards (PSAS) concepts, the structure of the PSAS Handbook, and differences between PSAS and those of ASPE or IFRS.	Four-segment Nov 23-Nov 26	9am-12:30pm	Live Webinar

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IFRS - Update 2020 This seminar provides participants with a review of new and revised International Financial Reporting Standards (IFRS) standards approved from July 2019 to June 2020, as well as an up-to-date snapshot of other projects being considered by IFRS standard setters.	Nov 16 Nov 30 Feb 26	9am-12:30pm 9am-12:30pm 9am-12:30pm	Live Webinar Live Webinar Live Webinar
IFRS 9 - Financial Instruments This course is designed to teach participants the main provisions of the Part I - International Financial Reporting Standards (IFRS) 9, Financial Instruments and provide them with the necessary knowledge to apply it to their own financial instrument fact situation.	Oct 26	9am-5pm	Live Webinar
IFRS 15 - Revenue Recognition IFRS 15, Revenue from Contracts with Customers contains a five-step revenue recognition framework. This seminar provides participants with practical knowledge of this framework and how to apply it. The seminar addresses disclosure requirements, discusses key areas of application challenges, key judgments required, and provides examples of applying the standard.	Nov 27	9am-5pm	Live Webinar
IFRS 16 - Leases IFRS 16 - Leases is now in effect and has significant impact for all companies with leases, particularly operating leases. This seminar provides an in-depth review of the new standard, including the objective and scope of the standard, defined terms, exemptions and transitional requirements.	Two-segment Dec 02 & Dec 03	9am-12:30pm	Live Webinar

NFPO - Disclosure and Presentation This seminar will serve as a review and refresher of the disclosure and presentation requirements of Accounting Standards for Not-for-Profit Organizations (ASNFPO) as well as the most common Accounting Standards for Private Enterprises (ASPE) standard applicable to not-for-profit organizations. Participants will learn what choices are available when setting accounting policies and the impacts on disclosure.	Dec 14	9am-5pm	Live Webinar
NFPO - Review of the Standards This seminar will discuss the application of NFPO accounting standards, with an emphasis on areas where choice exists in Part III- Accounting Standards for Not-for-Profit Organizations (ASNFPO) and relevant sections of Part II - Accounting Standards for Private Enterprises (ASPE). Participants will learn what choices are available when selecting policies and their impacts on disclosure, and how to determine the appropriate accounting treatment given different facts and scenarios.	Nov 20 Feb 18	9am-5pm 9am-5pm	Live Webinar Live Webinar
PSAS - Review of the Standards This seminar focuses on general CPA Canada Handbook Public Sector Accounting Standards (PSAS) concepts, the structure of the PSAS Handbook, and differences between PSAS and those of Accounting Standards for Private Enterprises (ASPE) or International Financial Reporting Standards (IFRS).	Nov 24	9am-5pm	Live Webinar
PSAS - Specific Topics By examining the application of complex areas in the CPA Canada Handbook Public Sector Accounting Standards (PSAS), participants will learn strategies for applying general standards to real- world scenarios. The seminar also includes a brief refresher on some of the more recent standards, including Asset Retirement Obligations and the expected Private/Public Partnerships Standard.	Dec 09	9am-5pm	Live Webinar

PSAS - Update 2020 As the Public Sector Accounting (PSA) Handbook continues to evolve at a rapid pace, users of public sector accounting standards may find it difficult to keep up. This course provides a review of sections in the PSA Handbook that have recently undergone addition or will soon come into effect, including ongoing key projects and activities of the PSA Board.	Nov 19 Feb 09	9am-12:30pm 9am-12:30pm	Live Webinar Live Webinar

MANAGEMENT ACCOUNTING & FINANCIAL MANAGEMENT

Advanced Financial Statement Analysis Enhance your analyzing skills for financial statements with this full-day course. Discover essential techniques to compare International Financial Reporting Standards (IFRS) and Accounting Standards for Private Enterprises (ASPE) reporting documents and highlight measures that must be taken into account to arrive at a detailed assessment.	Nov 23	9am-5pm	Live Webinar
Controllership - Operational Management In order to add value to their organizations, Controllers must serve four distinct roles: steward, operator, catalyst, and strategist. This seminar focuses on the roles of steward and operator by providing an overall understanding of the skills and tools necessary for controllers to fulfill their responsibilities as an operational manager.	Oct 22 Feb 18	9am-5pm 9am-5pm	**In-Person**, **Vancouver** **In-Person**, **Vancouver**
Controllership - Strategic Leadership As a companion seminar to Controllership - Operational Management, this seminar focuses on the Controller's roles of catalyst and strategist. In addition, this seminar provides the opportunity to view the controller as a leader and a key strategic partner within the organization while providing participants with practical tips on how to enhance their the leadership skills.	Oct 28 Feb 25	9am-5pm 9am-5pm	**In-Person**, **Vancouver** **In-Person**, **Vancouver**

Essential Topics for Controllers Explore essential areas that you will be expected to be proficient at, or at least have knowledge of, as your career as a Controller progresses. Career-enhancing topics such strategic planning, human resources, negotiating, management vs. leadership, and communication will be de-mystified.	Nov 6	9am-5pm	Live Webinar
Financial Management in the Construction Industry Attain greater knowledge in business systems and financial awareness in the construction industry, from the necessary complexity of the project accounting system, to the broad and integrated spectrum of stakeholders. Explore and be able to confidently address a wide range of topics in these areas.	Oct 20	9am-5pm	Live Webinar
Fraud Risk Management Effective fraud risk management requires an integrated approach to ensure the full spectrum of their unique risks is addressed. This seminar presents a holistic approach that brings together key principles and practices using the COSO fraud risk management framework.	Nov 19	9am-5pm	Live Webinar
Internal Controls - Industry Sector An often overlooked concept in accounting, internal controls ensure the integrity and reliability of accounting processes while protecting against fraud and corruption. Accordingly, this seminar provides an overview of the main concepts of internal controls and the associated components, focusing on the COSO framework.	Nov 26	9am-5pm	Live Webinar
Interpreting Financial Statements Strengthen your financial statement analysis capabilities through a hands-on review and interpretation of case studies as well as discussions. Be able to quickly and confidently get to what is happening through the interpretation of financial results, a critical skill in your toolbox.	Dec 3	9am-5pm	Live Webinar

Management Accounting - Fundamentals Some professional accountants may not have actively used management accounting principles for some time, but management accounting skillsets can be used to address many challenges in today's business environment. This course provides a refresher on key management accounting concepts and tools and how to apply them in your organization.	Two-segment Dec 09 & Dec 10	9am-12:30pm	Live Webinar
Powerful Financial Analysis Acquire key skills that financial analysts need to perform their role effectively within an accounting department. Obtain tools that will assist analysts in furthering their careers, including the abilities to providing meaningful information and influence those around them.	Oct 23	9am-5pm	Live Webinar
Practical Financial Negotiation Tips Discover many useful financial negotiation tips, illustrated by real-life examples that will get you thinking. Work through mini-cases to apply principles and increase your financial and business creativity to help your organization be successful in financial negotiations.	Dec 15	1:30pm-5pm	Live Webinar
Practical Tips for Controllers & CFOs Discover a wide range of useful tips that you can employ at work – tips that are not normally found in seminars or textbooks, illustrated with interesting anecdotes and examples.	Nov 24 Mar 24	9am-5pm 9am-5pm	Live Webinar Live Webinar
***NEW* Practical Tips for Government Accountants** Discover hundreds of useful and often uncommon tips for accountants working at any level of government, as well as government agencies. Many of these tips can be applied directly, while others will inspire innovative thinking.	Dec 07	9am-5pm	Live Webinar

Practical Tips for Not-for-Profit Financial Leaders Discover useful tips for accountants who work for not-for-profit organizations. The tips are illustrated through concrete examples derived from real experience. An in-depth, financial reporting improvement case will be used.	Mar 25	9am-5pm	Live Webinar
NEW **Taking Financial Statement & Ratio Analysis to the Next Level** Explore analyzing financial statements using a few different methods, focusing on ratio analysis and comparisons to industry standards sourced from various software tools, such as Bloomberg. Identify what to look for on financial statements, and discuss other indicators of health for an organization.	Oct 19	9am-5pm	Live Webinar

FINANCE

Budgeting & Financial Management: Understanding Budgeting Variance Analysis & Forecasting Learn the principles of financial management and how to apply them when making decisions that may affect financial performance. Understand the context within which a budget must be managed in order to meet corporate reporting requirements, and the responsibilities of managing a budget.	Two-segment Oct 27 & Oct 29 Mar 15 & Mar 22	 9am-11am 1pm-3:30pm 9am-11am 1pm-3:30pm	 Live Webinar Live Webinar Live Webinar Live Webinar
Business Valuations - Fundamentals Accountants often need basic business valuation knowledge and skills to assist their clients or employers. This full-day seminar provides participants with practical insight into business valuation. Specifically, participants will learn about and apply various valuation tools and approaches to the valuation process.	Oct 23 Dec 01	9am-5pm 9am-5pm	Live Webinar Live Webinar
Business Valuations - Advanced Building on the concepts taught in Business Valuations - Fundamentals, this seminar gives participants more detailed insight into more complex issues associated with business valuations.	Dec 04 Feb 17	9am-5pm 9am-5pm	Live Webinar Live Webinar
Business Valuations - Purchase Price Allocations This seminar presents practical strategies for approaching a purchase price allocation (PPA) for financial reporting purposes following a business acquisition or combination.	Dec 11	9am-5pm	Live Webinar
Costing & Profitability Learn how to contribute directly to your organization’s bottom line by analyzing profitability by product, customer, segment, or geographical region. You will also learn how to identify the main drivers of profitability and the parts of the business that need to be changed.	Nov 20	9am-5pm	Live Webinar

Due Diligence for Acquisitions 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 deepen their understanding of factors to consider, plan for, and watch for in M&A transactions.	Nov 19 Feb 25	9am-5pm 9am-5pm	Live Webinar Live Webinar
Financing Strategies At some point in their lifecycle, most, if not all, businesses require some type of financing. This seminar provides an in-depth review of the various forms of financing to fund capital projects or acquisitions and to reorganize existing capital structures.	Dec 07	9am-5pm	Live Webinar

INFORMATION & BUSINESS TECHNOLOGY

2020 Technology Update 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? This fast-paced and highly informative seminar is sure to ramp up your return on technology investment.	Nov 09	1:30pm-5pm	Live Webinar
Advanced Excel For experienced Excel users seeking to elevate your skills, this seminar will provide critical advanced Excel skills in six key areas: collaborating, using tables, external source data, complex formulas, advanced data analysis tools, and visualization techniques.	Nov 19	9am-5pm	Live Webinar
Advanced Excel Data Magic - Managing, Analyzing and Reporting With tools such as Data Models, Power Query, and Power Pivot, today's versions of Excel offer unparalleled opportunities to move beyond traditional reporting techniques. If you are interested in advancing your reporting processes and minimizing your dependence on formulas, then this is the one class you cannot afford to miss.	Feb 23	9am-5pm	Live Webinar
An End to Manual Effort in Excel: The Power Query Effect 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.	Oct 20 Dec 15	9am-5pm 9am-5pm	Live Webinar Live Webinar
Best Word, Outlook and PowerPoint Features Most professionals routinely use Word, Outlook, and PowerPoint, but many are self-taught and often use inefficient techniques. If that describes you, then make sure to attend this seminar to learn how you can work much more efficiently when using these tools.	Nov 25	9am-12:30pm	Live Webinar

Blockchain Essentials for CPAs This session aims to help participants comprehend what blockchain could mean for the CPA profession. It addresses how blockchain impacts business processes, how to approach risk identification and mitigation in a blockchain environment, and longer-term questions that blockchain raises for the profession.	Nov 04	1:30pm-5pm	Live Webinar
Business Intelligence, Featuring Microsoft's Power BI Tools Learn how to implement "do it yourself business intelligence" using a variety of techniques and tools, such as Excel's advanced data query and summarization features. Join us for a fast-paced look at how you can take advantage of these fantastic tools to gain greater insights into your data for better decision making.	Nov 23	9am-5pm	Live Webinar
Cloud Computing Learn the fundamentals of cloud computing, the necessary skills to determine if cloud computing might be right for your organization or for your clients, and how to migrate to cloud-based solutions while avoiding major pitfalls along the way.	Nov 03 Feb 09	9am-5pm 9am-5pm	Live Webinar Live Webinar
Creating Vibrant Dashboards Tell a story using effective data visualization tools in Excel with this one-day course. Examine charts, conditional formatting, and other techniques and showcase the results in a dynamic and engaging dashboard.	Dec 10	9am-5pm	Live Webinar
DAX Formulas for PowerPivot Up your DAX game so that you can make your PivotTables show the exact aggregations you need. From creating simple measures to controlling percent of grand totals which don't lose their context upon filtering, to advanced patterns to control date period intelligence, we'll cover it here.	Dec 01	9am-5pm	Live Webinar

Excel Boot Camp If you are ready for intensive Excel training, then this course is for you. Using accounting-centric examples, developed for and by accountants, this course takes you through Excel from A to Z and shows you how to take your use of Excel to the next level.	Two-segment Nov 13 & Nov 16	9am-5pm	Live Webinar
Excel Charting and Visualizations Learn how to create advanced charts that are interactive, dynamic, and aesthetically pleasing – three qualities that will help to ensure that your audience will understand the data you are presenting. Create visualizations that will effectively communicate your data.	Feb 10	9am-12:30pm	Live Webinar
Excel Financial Models and Analysis 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 business intelligence (BI) features in Excel for reporting and presentation.	Nov 06 Nov 23 Feb 16	9am-5pm 9am-5pm 9am-5pm	**In-Person, Vancouver** Live Webinar Live Webinar
Excel: Specific Skills for Budgeting, Planning & Forecasting Need help to improve budgeting, planning and forecasting processes in your business? This hands-on workshop will help you apply specific skills in Excel to do just that. Work on data consolidation for budgets, securing workbooks, and forecasting and charting techniques for presenting budgets.	Dec 14 Mar 10	9am-5pm 9am-5pm	Live Webinar Live Webinar
Excel: The Next Level of Skills It is time to take your Excel skills to the next level! Discover the best advanced features and functions in Excel to make your accounting and finance tasks easier, faster and more accurate, and increase the complexity of your data analysis and reporting.	Oct 23 Oct 28 Dec 01	9am-5pm 9am-5pm 9am-5pm	**In-Person, Vancouver** Live Webinar Live Webinar

Introduction to Excel Macros Designed for those with little, if any, experience working with macros, this course will teach the fundamentals of creating and working with macros in Excel. Learn the basics of VBA, including many necessary elements to write macros that can make you and your team more effective and productive with Excel.	Nov 24	1:30pm-5pm	Live Webinar
Financial Modeling in Excel In this interactive seminar, accountants and other professionals who want to learn how to use Excel to build better financial models will discover how to confidently build a suite of forecast financial statements using best modeling practices.	Two-segment Oct 21 & Oct 22	1pm-3:30pm	Live Webinar
Five Success Strategies for Your Technology Projects Technology advances are disrupting businesses and the pace of digital change is accelerating. Discover how to navigate disruption and leverage best practices in technology delivery to grow your business.	Oct 27	9am-12:30pm	Live Webinar
Foundations of Blockchain Gain a holistic overview of blockchain from a business (non-technical) perspective, including what it is and what it can do, how it is being applied today, and its potential to transform business and industry.	Nov 04	9am-12:30pm	Live Webinar
Getting Started with Excel PowerPivot Linking data from multiple sources, while powerful, only scratches the surface of the impact that Power Pivot is making in the business intelligence landscape. Learn the right way to use Power Pivot in this hands-on course developed by a CPA and business intelligence (BI) expert with real-world experience.	Nov 27	9am-5pm	Live Webinar

Google is Not Enough: The Best Search Tools You Aren't Using (But Should!) Gain 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". Discover a whole new universe of tools and content that are largely off the Google radar, and techniques to take you to the next level of online intelligence gathering.	Dec 16 Mar 17	9am-5pm 9am-5pm	Live Webinar Live Webinar
Optimizing Data for Power Pivot Using Power Query Explore the things you can do to increase your Power Pivot model performance, key factors that affect performance, and how to deal with them. Look at sourcing your data with Power Query, and discover tricks to optimize it for Power Pivot consumption.	Feb 16	9am-5pm	Live Webinar
Paperless Office No one expects a completely paperless office, but reducing the amount of paper used can lead to tremendous rewards. Discover best practices and proven processes for effective document management, and how you can implement simple, inexpensive document management systems at an individual, work group, or small business level.	Nov 09 Feb 08	9am-5pm 9am-5pm	Live Webinar Live Webinar
Rapid Dashboard Development with Power BI Desktop Power BI Desktop provides access to compelling dashboards that are attractive, interactive, and best of all, incredibly easy to both build and refresh. This hands-on session will explore sourcing data, data visualization and transformation, data model relationships, DAX measures, interactive visuals, and sharing dashboard solutions.	Nov 19 Mar 16	9am-5pm 9am-5pm	Live Webinar Live Webinar
***NEW* Remote Access for Small Businesses** Small businesses have unique and specific technology needs. Learn about practical solutions for facilitating remote access in small businesses, including remote access to a desktop, working securely, considerations for cloud-based solutions, and how to facilitate collaboration in remote environments.	Nov 26	1:30pm-5pm	Live Webinar

Top PDF Features You Should Know Learn how to use tools and features to their fullest to optimize your work with PDF documents, including PDF forms, redaction, converting PDFs to Word and Excel files, electronic signatures, creating and applying tick marks, building indices and catalogues, portfolios, and securing PDF documents.	Nov 12	1:30pm-5pm	Live Webinar
VBA Fundamentals: From Zero to Hero This is a two-day, hands-on VBA course that takes someone from no coding experience to understanding VBA fundamentals. Learn the concepts the way an accountant understands them, with examples that are accounting focused.	Two-segment Dec 04 & Dec 07	9am-5pm	Live Webinar

PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT

COMMUNICATION & NEGOTIATION

Becoming a Skilled Negotiator This interactive course will 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.	Two-segment Nov 16 & Nov 17	 8:30am-11am	 Live Webinar
Clear Thinking/Clear Speaking Enhance your way of speaking both clearly and succinctly. Learn how to respond to questions, speak up at meetings, and feel more comfortable in social interactions.	Two-segment Nov 04 & Nov06 Feb 22 & Feb 24	 9am-12:30pm 9am-12:30pm	 Live Webinar Live Webinar
Communicating Effectively Under Pressure Explore situations where you may feel pressure, and learn practical strategies to manage these situations effectively.	Two-segment Nov 10 & Nov 13 Feb 18 & Feb 19	 9am-12:30pm 9am-12:30pm	 Live Webinar Live Webinar
Communicating with Influence Ever been caught in the communication circle of, “That’s not what I said – that’s not what I meant”? Attend this seminar to learn new skills to clearly and effectively get your message across, and communicate with influence to support your success as a leader and manager.	Two-segment Nov 05 & Nov 06 Feb 23 & Feb 24	 9am-12:30pm 9am-12:30pm	 Live Webinar Live Webinar
Conflict: Changing Viewpoints & Influencing Behaviors In this highly practical course, learn how to turn conflict into opportunities for problem solving and how to deal effectively with confrontation and criticism. Discover your “hot buttons” and develop self-control.	Three-segment Dec 08-Dec 10	 10am-12:30pm	 Live Webinar

We encourage you to check our website for the most up-to-date schedule as offerings can be added, changed or cancelled

NEW **Negotiation Skills** This workshop is based on the four-part model described in the world-renowned book *Getting to Yes: Negotiating Agreement Without Giving In* by Fisher and Ury. The majority of the workshop is spent working on actual negotiations faced by participants, with a heavy emphasis on practice and coaching by peers and the facilitator.	Two-segment Feb 03 & Feb 04 Feb 25	 9am-12:30pm 9am-5pm	 Live Webinar **In-Person, Vancouver**
Tools for Communicating with Difficult People Learn how to deal with your reactions to others and self-manage your own. Discover techniques to respectfully but assertively conduct difficult conversations.	Two-segment Dec 07 & Dec 11 Mar 11 & Mar 12	 9am-12:30pm 9am-12:30pm	 Live Webinar Live Webinar
Write to be Read Learn how to improve the readability of your writing, and how to write in ways that fit with how reading patterns have changed due to technology's impact. Discover other tips and techniques for writing efficiently and effectively.	Nov 17 Feb 24	9am-12:30pm 9am-12:30pm	Live Webinar Live Webinar

PROBLEM-SOLVING & DECISION-MAKING

NEW **Project Management** Learn how to apply foundational project management tools and practices in a way that increases the probability of successful project execution.	Nov 12	9am-12:30pm	Live Webinar
NEW **Setting Concrete Goals and Metrics** Learn how to set crisp, clear, meaningful goals and metrics for everything that is really important, including both "hard" and "soft" goals, making it easier for you to discuss and manage performance, skill development, and even core values.	Nov 17	9am-12:30pm	Live Webinar

PROFESSIONAL & ETHICAL BEHAVIOUR

A Threats and Safeguards Approach to Ethical Decision Making Explore situations in your professional roles that involve ethical challenges and examine how these can pose threats to compliance with the Fundamental Principles. Determine how these threats can be mitigated, through examining the CPA Code and relevant safeguards.	Sep 29	8:30am-12:30pm	Live Webinar
	Oct 15	8:30am-12:30pm	Live Webinar
	Oct 24	8:30am-12:30pm	Live Webinar
	Oct 26	8:30am-12:30pm	Live Webinar
	Nov 13	1pm-5pm	Live Webinar
	Nov 19	8:30am-12:30pm	Live Webinar
	Nov 21	8:30am-12:30pm	Live Webinar
	Nov 27	8:30am-12:30pm	**In-Person**, **Vancouver**
	Nov 30	1pm-5pm	Live Webinar
	Dec 04	8:30am-12:30pm	Live Webinar
	Dec 11	8:30am-12:30pm	Live Webinar
	Dec 15	8:30am-12:30pm	Live Webinar
	Jan 28	8:30am-12:30pm	Live Webinar
Becoming an Ethical Leader Explore the critical role that ethical leadership contributes to organizations with interactive group discussions that are based on real life challenges leaders may face.	Oct 29	8:30am-12:30pm	Live Webinar
	Dec 09	8:30am-12:30pm	Live Webinar
	Feb 23	8:30am-12:30pm	Live Webinar
Business Ethics: It Starts with You Understand and manage ethical issues in your everyday business setting. Explore how both personal and business values influence business decisions through dynamic group discussions.	Oct 22	8:30am-12:30pm	**In-Person**, **Vancouver**
	Nov 10	8:30am-12:30pm	Live Webinar
	Nov 10	1pm-5pm	Live Webinar
	Dec 10	8:30am-12:30pm	Live Webinar
	Dec 10	1pm-5pm	Live Webinar
	Feb 23	8:30am-12:30pm	**In-Person**, **Vancouver**
	Mar 23	8:30am-12:30pm	Live Webinar

Ethical Leadership in an Age of AI Advancements in artificial intelligence (AI) raise unique ethical challenges for business leaders. Participants will collaborate to evaluate a variety of ethical situations and explore the implications of AI technologies on the role of an ethical leader in the context of the CPA Code.	Sep 23 Oct 20 Nov 04 Nov 23 Dec 16 Feb 10	8:30am-12:30pm 8:30am-12:30pm 8:30am-12:30pm 1pm-5pm 8:30am-12:30pm 8:30am-12:30pm	Live Webinar Live Webinar **In-Person**, **Vancouver** Live Webinar Live Webinar Live Webinar
Ethics and Technology Uncover ethical considerations and outcomes related to technology. Explore “technoethics”, and the implications this has on individuals and organizations, in issues such as copyrights, cybercrimes, and geo-tracking technologies.	Nov 02 Dec 09 Mar 03	8:30am-12:30pm 8:30am-12:30pm 8:30am-12:30pm	Live Webinar Live Webinar Live Webinar
Ethics at Our Core Refresh your knowledge on the CPA Code of Professional Conduct and apply the code to resolve several interactive case studies and realistic situations.	Oct 07 Oct 28 Nov 16 Nov 25 Dec 05 Dec 14 Jan 21 Feb 18	8:30am-12:30pm 8:30am-12:30pm 8:30am-12:30pm 8:30am-12:30pm 8:30am-12:30pm 8:30am-12:30pm 8:30am-12:30pm 8:30am-12:30pm	Live Webinar Live Webinar Live Webinar Live Webinar Live Webinar Live Webinar Live Webinar **In-Person**, **Vancouver**
Setting the Tone: It Only Starts at the Top Get to the root causes of ethical lapses. Learn what the attributes of an ethical culture are, how to evaluate the organization’s ethical climate, and the role leaders play in promoting that climate.	Oct 21	9am-10:30am	Live Webinar

Shades of Grey: Ethics in the Workplace Enhance your understanding of professional ethics through group case studies on everyday dilemmas and explore moral philosophy in the workplace.	Nov 24 Dec 09 Feb 23	8:30am-12:30pm 1pm-5pm 1pm-5pm	Live Webinar Live Webinar Live Webinar
Understanding and Embracing Ethics in the Workplace Learn effective techniques for ethical thinking and how to apply these tools to relevant business-based scenarios.	Oct 26 Nov 09 Nov 16 Dec 02 Dec 07 Mar 08	8:30am-12:30pm 8:30am-12:30pm 1pm-5pm 8:30am-12:30pm 1pm-5pm 8:30am-12:30pm	**In-Person, Vancouver** Live Webinar Live Webinar Live Webinar Live Webinar Live Webinar

SELF MANAGEMENT

Balancing Your Wheels Come and develop a personal "whole life" vision in this course. Learn key optimizers that will help you manage your resiliency and energy for both your personal and professional life.	Three-segment Dec 02, Dec 09, & Dec 16	9am-11:30am	Live Webinar
Brain Focus: The Power of Full Engagement A full day course packed with strategies to help your productivity and improve your focus to work smarter all day long.	Oct 29	9am-12:30pm	Live Webinar
Coach Yourself First Gain a deeper understanding of your personal coaching style and its impact on others. Discover the power of personal passion, engagement and purpose to manage yourself, and coach others to be effective coaches.	Feb 22	9am-5pm	Live Webinar

Critical Thinking and Self Reflection Designed for leaders who want to develop their critical thinking skills to enhance personal effectiveness, this seminar will diagnose your learning style, introduce critical thinking tools, and help you develop an action plan.	Nov 17 Feb 26	9am-5pm 9am-5pm	Live Webinar Live Webinar
Influence and Assertiveness Designed for individuals wishing to develop their influence and assertiveness to increase their impact within their organization, this highly interactive seminar will provide tools and techniques, and will help develop an action plan for the future.	Dec 09	9am-5pm	Live Webinar
NEW **Leading Self and Emotional Intelligence** Learn how to apply factual thinking to better deal with our emotional triggers and self-limiting beliefs. Discover practical tools that will enable you to build new habits and to relate to others in a more impactful and influential way.	Nov 05	9am-12:30pm	Live Webinar
NEW **Stress Management** Gain awareness of the mental chatter that informs our stress levels, evaluate your thinking during times of stress, and then build new ways to respond to stressful situations.	Nov 03	9am-12:30pm	Live Webinar
The Focused CPA – Finding and Maintaining Focus in the Age of Distraction One of the greatest challenges for CPAs today is maintaining a focused mind amidst a sea of distractions and competing interests. Obtain the knowledge, tools and practices to find your focus and maintain it. You can expect to gain anywhere from 30 to 90 minutes per day (or more) of productive time, or time spent on what matters most in your lives.	Two-segment Nov 20 & Nov 27	9am-12:30pm	Live Webinar
The Four Intelligences Using Stephen Covey's Four Intelligences as a base - intellectual, emotional, physical and spiritual, this session will explore tools and strategies to effectively navigate change, and examine the challenges and opportunities in leading through change.	Dec 03	9am-12:30pm	Live Webinar

Time Management: The Essentials of Productivity Skills Discover a new mind-set and skill-set that will optimize your personal productivity. Learn how to gain and keep control of competing priorities, concurrent projects and critical deadlines in this seminar that focuses on practicality.	Dec 07 Mar 11	9am-5pm 9am-5pm	Live Webinar Live Webinar
Transforming the Way You Sell Yourself Learn the skills to sell your expertise with confidence in order to influence decision-makers, board members, and prospective clients or employers.	Nov 12 Mar 04	9am-5pm 9am-5pm	Live Webinar Live Webinar
Triple Your Reading Speed Learn how to quickly, easily, and dramatically improve reading speed and comprehension. In addition, discover how you can enhance your memory and improve your vocabulary, and receive motivational tips on goal-setting and advice on time management.	Nov 30	9am-5pm	**In-Person, Vancouver**

TEAMWORK & LEADERSHIP

Assessing and Responding to Workgroup Conflict Discover a framework for identifying and assessing workgroup conflict, a toolbox of response processes, and an approach to making reasoned, defensible decisions about which tool to use when.	Mar 9	9am-12:30pm	Live Webinar
Building High Performance Teams Every business leader knows their workers are their best opportunity for achieving a sustainable competitive advantage. Learn how to genuinely motivate, engage, excite, and keep employees.	Three-segment Nov 03, Nov 04, & Nov 05	10am-12:30pm	Live Webinar

Coaching for Executive Excellence Learn effective coaching techniques and best practices, create great coaching relationships, and apply coaching in everyday management situations to empower your team to go beyond their own capacity.	Two-segment Nov 05 & Nov 12	9am-12:30pm	Live Webinar
NEW **Creative Leadership: Bringing Innovation to the Workplace** Explore the steps you can take to become a creative leader, how to bring greater diversity of thinking into the workplace, create a culture where people aren't afraid of failure, and become a champion for change.	Oct 22	9am-10:30am	Live Webinar
Dispelling the Myth of "Effective Meetings": Engaging Virtual Meetings Your Employees Will Want to Attend Plan an effective framework designed to build meetings that are productive and engaging for the team. Explore the benefit of contribution, and recent research on new innovative ideas.	Oct 19	9am-12:30pm	Live Webinar
Doing Business as Unusual This cutting-edge, counter-intuitive course will enable you to start important conversations about how to fix failing or broken business practices by embracing ideas that run contrary to everything you've ever been taught to do to survive in a volatile, unpredictable world.	Three-segment Oct 19, Oct 20, & Oct 21	10am-12:30pm	Live Webinar
Effective & Essential Management Skills This fast-paced and practical learning experience will enhance your tactical managerial and coaching skills. Learn how to drive high degrees of engagement, delegate, empower, and provide meaningful feedback to your team.	Nov 17 Mar 22	9am-5pm 9am-5pm	Live Webinar Live Webinar

NEW **Enhancing Your Influencing Strategies** A good leader can be anyone in the organization, and typically, it is someone who has the ability to influence others. Drill down into how to develop effective influencing skills and apply concrete strategies that will enhance those skills.	Oct 29	9am-10:30am	Live Webinar
Enhancing Your Management Skills This workshop is designed to build leadership and people skills for those who are looking to move into management roles, or managers looking to lead more effectively. Build the skills necessary to understand motivation, prevent micromanagement, and develop engagement.	Oct 26 Dec 11	9am-12:30pm 9am-12:30pm	Live Webinar Live Webinar
NEW **Essential Skills for Managers** This course will provide managers who are relatively new in their careers, with the foundational knowledge and skills that enable them to perform their people management responsibilities.	Two-segment Mar 18 & Mar 25	9am-12:30pm	Live Webinar
Giving and Receiving Feedback in the Workgroup Learn specific tools and techniques to positively influence the behavior of others when giving feedback. Acquire useful skills through real-life examples and role-play that will enhance the productivity of your interactions with anyone in a work-related context.	Nov 2	9am-12:30pm	Live Webinar
NEW **High Performing Team Member** The aim of this workshop is to provide team members with the skills and tools to contribute optimally to the performance of the team. Special emphasis is placed on the interpersonal skills that team members need.	Dec 15 Mar 10	9am-12:30pm 9am-12:30pm	Live Webinar Live Webinar

NEW **Improving Collaboration on Remote Teams for Better Teamwork, Engagement and Performance** Gain a series of foundational collaboration practices and tools that will help you enhance employee engagement, teamwork, and productivity. We will work on the use of these practices and tools for leading intact teams, team projects, and remote teams.	Nov 26	9am-12:30pm	Live Webinar
Influencing Without Authority 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. Learn the skills and processes required to influence others in getting things done.	Feb 24	9am-5pm	**In-Person, Vancouver**
Leadership and Coaching Equip yourself with the skills to become an effective and respected leader, able to turn compliance into commitment. Gain knowledge on strategic and inspirational leadership, shared core values, coaching for growth, and mentoring to enable others to fulfil their potential.	Nov 12	9am-5pm	Live Webinar
Make Change Stick: Getting Results by Changing the Inner Game Science reveals that old habits, a fixed mindset, and our unconscious mind co-conspire to make us immune to change. Learn how to apply the science-based approach, developed at Harvard University, credited as having ‘cracked the code’ on this immunity to change phenomena.	Three-segments Oct 20, Oct 27 & Nov 3	 9am-11:30am 9am-12pm 9am-11:30am	 Live Webinar Live Webinar Live Webinar
Managing Change and Transformation Understand and respond to the continual process of business change and transformation. Learn how you can champion change efforts, and manage the process through leadership, perseverance, risk-taking, and the enrolment of others.	Nov 04	9am-5pm	Live Webinar

Managing My People Managers find it challenging to maximize their people's contribution to the success of their business. This interactive course will discuss effective ways of working with teams, in order get the best out of each team member.	Two-segment Oct 26 & Oct 27 Feb 09 & Feb 10	 8:30am-11am 8:30am-11am	 Live Webinar Live Webinar
NEW **Managing Transitions: Leading the People Side of Change** Understanding how change affects people is one of the most important factors in successfully implementing changes. This hands-on workshop will furnish you with dozens of practical techniques and tools to help people prepare for, deal, with, and make the most of change.	Nov 24	9am-12:30pm	Live Webinar
Seven Steps to Successful Virtual Teamwork Working from home and dispersed offices create challenges to the ways we work and communicate. Learn best practices to foster successful teamwork in dispersed work locations by identifying barriers and fostering high-performing behaviours.	Oct 28 Mar 18	9am-5pm 9am-5pm	Live Webinar Live Webinar
Wiring Your Brain for High Impact Leadership Leverage the latest theories on the brain and how thinking habits influence our actions, especially with problem solving and conflict resolution. Discover brain engagement, and learning to lead with the brain in mind.	Dec 02 Mar 24	9am-5pm 9am-5pm	Live Webinar Live Webinar

RESILIENT LEADERSHIP CERTIFICATE PROGRAM

NEW **Resilient Leadership - Five Qualities of a Leader Who Thrives in a Crisis** How leaders show up in this moment and what you stand for will be remembered for years to come. Discover the five qualities of a leader including insights and tools to assess and strengthen your ability to not only survive, but thrive, during a crisis.	Oct 29 Nov 12 Feb 17	9am-12:30pm 9am-12:30pm 9am-12:30pm	Live Webinar Live Webinar Live Webinar
NEW **Resilient Leadership - Energize Your Team Through Uncertainty** Leading in times of uncertainty is like driving in the fog. Discover how to bring more clarity and focus to your leadership and learn a simple three-part framework to help you lead through uncertainty and strengthen your team for the long haul.	Nov 10 Nov 24 Mar 4	9am-12:30pm 9am-12:30pm 9am-12:30pm	Live Webinar Live Webinar Live Webinar
NEW **Resilient Leadership - Who's Listening?** We're not listening. And no one is listening to us. Yet listening is essential to our times. Change the way you think about communicating with your team, family, and friends, and discover a roadmap on how to listen, and why being a good listener matters so much now.	Nov 17 Dec 1 Mar 11	9am-12:30pm 9am-12:30pm 9am-12:30pm	Live Webinar Live Webinar Live Webinar
NEW **Resilient Leadership - Manage Your Mindset and Emotional Well-being** Have you considered how you will remain optimistic and hopeful in front of your team and family, no matter what the situation? Dig into the need for leaders to make room for all kinds of emotions. Then learn to lead with strength and compassion while supporting emotional well-being and resilient mindsets.	Nov 25 Dec 3 Mar 17	9am-12:30pm 9am-12:30pm 9am-12:30pm	Live Webinar Live Webinar Live Webinar
NEW **Resilient Leadership - Balance Life, Work and Overwhelm** How do you deal with work that never ends? Learn how to set up a routine that is productive, healthy and sustainable. Get beyond "panic working" and look at tools to help you focus, energize, and allocate your time to the things that matter most.	Nov 26 Dec 11 Mar 24	1pm-4:30pm 9am-12:30pm 9am-12:30pm	Live Webinar Live Webinar Live Webinar

» **LEARN** How you can become a resilient leader, view our leadership videos on CPABC's YouTube channel.

PUBLIC PRACTICE MANAGEMENT

Starting a Successful CPA Practice Obtain information and assessment of the skill sets needed to start and develop a successful CPA practice. Gain practical knowledge needed to build a strong practice management framework, and explore the skills needed to develop and build a successful practice.	Dec 11	9am-5pm	Live Webinar

» **PUBLIC PRACTITIONERS** Learn the latest technologies and share best practices at our Public Practice Insights (November 18), stress proof your brain and become more resilient with Terry Small, the brain guy.

STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE

An Introduction to Strategy Driven Budgeting Review traditional budgeting approaches, such as adjusted cost, to understand the strengths and weaknesses of these approaches. Then explore Strategy-Based Budgeting (SBB), a well-established methodology that takes into account demand driven budgeting to allow for better forecasting of costs of operations.	Two-segment Oct 20 & Oct 21	9am-12:30pm	Live Webinar
Crisis and Process: Business Adaptations in the COVID-19 Reality Even when the positive benefits of change are clear, it is perplexingly difficult for business and professionals to change on their own accord. It is a critical time for business leaders to examine, understand and proceed with considered direction as rapid change in operations, workflow and uncertain economic times unfold.	Oct 14 Nov 06	8am-10am 10am-12pm	Live Webinar Live Webinar
NEW **Developing Meaningful KPIs** Organizations understand the importance of using performance measures, however they are often selected based on convenience and accessibility. Walk through the process of setting meaningful key performance indicators using a balanced scorecard approach to ensure that there is strategic alignment.	Oct 30	9am-10:30am	Live Webinar
NEW **Emerging Areas of Focus and Practice for Boards of Directors** This half day seminar will review emerging areas of focus for Boards in the not-for-profit sector. The seminar will draw on case studies to illustrate how Boards are improving their governance in areas such as oversight of organizational culture and board diversity. You will explore timely topics and obtain practical tips to take back to your board.	Dec 15	9am-12:30pm	Live Webinar
Employment Law & HR Practices Gain a practical perspective on the relationship between the legal landscape for (mostly non-union) employment in Canada, and day-to-day human resources activities that impact your organization.	Oct 28 Nov 12	9am-5pm 9am-5pm	Live Webinar **In-Person, Vancouver**

Faster and Better Financial Processes Learn how to implement a financial process review (FPR) to decrease cost and improve efficiency. Gain the skills and knowledge to understand FPR best practices and barriers for implementation, and how to troubleshoot problems when using FPR tools.	Two-segment Dec 01 & Dec 03	9am-12:30pm	Live Webinar
Handling Termination of Employment Obtain an overview of issues and recent updates surrounding the termination of employment. Receive a comprehensive summary of employer termination liabilities, become aware of all the issues relating to termination of employment and learn a practical framework for planning.	Dec 04	8am-10am	Live Webinar
NEW **Improving Governance in Smaller Canadian Not-for-Profit Entities** Gain the tools board members, management, and auditors in smaller not-for-profit entities need to become the “go to” person on improving governance. Discover practical approaches, ideas and guidance to bring about highly functioning boards and management teams.	Two-segment Dec 10 & Dec 11	9am-12:30pm	Live Webinar
NEW **Improving your Bottom Line Using KPIs** Discover how CPAs can use key performance indicators (KPIs) to improve any organization’s bottom line. Using real case studies and group work, this session will show the significant returns which can be gained from using KPIs properly.	Two-segment Nov 09 & Nov 10	9am-12:30pm	Live Webinar
Leading Strategy into Action Gain tools and techniques to help communicate the key strategic imperatives of a business, align daily decisions with business strategy, examine the repercussions of failing to follow the strategy, and explore the link between strategy implementation and the success of a business.	Nov 24	9am-5pm	Live Webinar

Top Employment Issues Affecting Your Bottom Line 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.	Dec 14	9am-12:30pm	Live Webinar

STRATEGIC MANAGEMENT CERTIFICATE & ADVANCED STRATEGIC MANAGEMENT CERTIFICATE PROGRAMS

Strategic Management Certificate: Change Management Learn how organizational and human dynamics impact change initiatives, how to plan for change and examine the main ingredients necessary for successful implementation.	Nov 25 Feb 25	9am-5pm 9am-5pm	Live Webinar Live Webinar
Strategic Management Certificate: Risk Management & Governance Examine different types of risks which can undermine the achievement of an organization's objectives, and the management approaches and tools used to manage these risks.	Oct 29 Dec 15 Mar 16	9am-5pm 9am-5pm 9am-5pm	Live Webinar Live Webinar Live Webinar
Strategic Management Certificate: Strategic Planning Examine the link between stated organizational goals, the business environment, and visible strategies, with focus on the functional strategy level. Gain an appreciation of the tools used to develop and execute successful strategies.	Oct 21 Dec 09 Mar 09	9am-5pm 9am-5pm 9am-5pm	Live Webinar Live Webinar Live Webinar
Strategic Management Certificate: Team Development Gain an in-depth understanding of factors impacting team effectiveness, including team design, stages of team development, and ingredients necessary for achieving results.	Nov 24 Feb 17	9am-5pm 9am-5pm	Live Webinar Live Webinar

Advanced Strategic Management Certificate: 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.	Mar 17	9am-5pm	**In-Person**, **Vancouver**
Advanced Strategic Management Certificate: Maps In this session, participants will gain experience in strategy mapping and integration. Understand how to assess and consider limited resources in strategic planning and how to best make hard choices between strategic alternatives, priorities, and resources.	Mar 09	9am-5pm	**In-Person**, **Vancouver**

Seminar Schedule
PD Passports
Nexus Days
Executive Programs
Certificate Programs

TAXATION

Advanced Tax Planning for Business Succession This seminar provides a comprehensive review of income tax compliance and planning issues relevant to the preparation of Canadian corporate income tax returns. The focus is on tax planning that is, or can be, implemented during the preparation of tax returns, rather than broader tax planning undertaken on a proactive basis outside of year-end financial statement and tax return preparation.	Oct 28 Mar 03	9am-5pm 9am-5pm	**In-Person, Vancouver** Live Webinar
NEW **CCPCs - The New Hurdles** Over the past five years, a number of tax changes have been introduced that impact Canadian private corporations. Gain a high-level overview of these changes and the impact of these changes to help with tax planning and compliance for CCPCs.	Oct 21	8am-10am	Live Webinar
Corporate Restructuring - Application for Private Corporations This seminar provides a practical approach and guidance on identifying, planning, documenting, and implementing reorganizations of private corporate groups.	Nov 06	9am-12:30pm	Live Webinar
Corporate Restructuring - Fundamentals This full-day seminar highlights fundamental income tax considerations that arise in corporate reorganizations, including a discussion of related provisions and key pitfalls.	Nov 04	9am-5pm	Live Webinar
Corporate Restructuring - Section 85: Transfer of Property In order to help practitioners and other tax professionals assist clients and others with property transfer engagements, this seminar covers selected tax aspects explaining the transfer of property to a corporation using the Section 85 rollover rules.	Oct 28	9am-5pm	Live Webinar

Corporate Tax - Compliance and Planning in T2 Preparation This seminar provides a comprehensive review of income tax compliance and planning issues relevant to the preparation of Canadian corporate income tax returns. The focus is on tax planning that is, or can be, implemented during the preparation of tax returns, rather than broader tax planning undertaken on a proactive basis outside of year-end financial statement and tax return preparation.	Nov 25 Feb 08	9am-5pm 9am-5pm	Live Webinar Live Webinar
Corporate Tax - Investment Holding Corporations The taxation of investment holding corporations has 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?	Oct 22 Nov 17 Dec 03 Feb 10	9am-12:30pm 9am-12:30pm 9am-12:30pm 9am-12:30pm	Live Webinar Live Webinar Live Webinar Live Webinar
Corporate Tax - Purchase and Sale of a Business This seminar will provide an understanding and update of Canadian income tax issues for purchasers and vendors of businesses in Canada and their professional tax advisors. The focus of this course will be on transactions between Canadian private business owners and/or their privately-held corporations.	Oct 19 Nov 13 Feb 16	9am-5pm 9am-5pm 9am-5pm	Live Webinar **In-Person, Vancouver** Live Webinar
Corporate Tax - RDTOH, CDA and Other Tax Accounts This seminar provides a detailed review of the key tax accounts for private corporations and examines tax planning processes in the case of multiple tax accounts, including GRIP, LRIP, CDA, and the three RDTOH pools.	Nov 10	1:30pm-5pm	Live Webinar
Corporate Tax - Review of Tax Planning This two-day seminar provides practitioners with a refresher on technical and tax planning issues for corporations. Although the seminar reviews taxation for public and private corporations, the session primary focuses on the taxation of private companies.	Two-segment Oct 23 & Oct 30 Mar 05 & Mar 09	 9am-5pm 9am-5pm	 Live Webinar Live Webinar
Corporate Tax - Section 55: How Safe Are Your Dividends? The anti-avoidance rules in Section 55 of the Income Tax Act (ITA) now apply to a greater number of private corporations. Practitioners and other tax professionals must now consider Section 55 for all intercorporate dividends to avoid unexpected tax. This seminar provides an improved basis for understanding these rules and their application.	Nov 10	9am-12:30pm	Live Webinar

Seminar	Date	Time	Location
Corporate Tax - Shutting Down the Corporation This seminar will focus on the many tax issues that arise, from a compliance and planning perspective, when shutting down a private corporation. Common traps and planning opportunities that arise when shutting down private corporations will also be discussed.	Oct 16	9am-12:30pm	Live Webinar
Corporate Tax - Small Business Deduction and Private Corporate Groups While the small business deduction reduces the amount of income tax for many corporations, the myriad of rules and regulations and recent changes has significantly expanded the complexity. This seminar covers the unique taxation issues that apply to groups of privately held companies and their access to the small business deduction.	Oct 27	9am-5pm	Live Webinar
Current Strategies in Tax Dispute Resolution 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.	Dec 03	9am-12:30pm	**In-Person**, **Vancouver**
GST/HST - CRA Audit Building upon fundamental GST/HST knowledge, this full-day session provides an in-depth examination of the audit process, and will discuss how audits are selected, common assessment areas, and how to minimize audit assessments.	Nov 26	9am-5pm	Live Webinar
GST/HST - Fundamentals 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 provide an overview a variety of important concepts related to the application and the recovery of the GST/HST.	Oct 30 Dec 01	9am-5pm 9am-5pm	**In-Person**, **Vancouver** Live Webinar

GST/HST - NFPOs The non-profit sector covers a wide spectrum of activities. 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.	Dec 11	9am-5pm	Live Webinar
GST/HST - Real Property The application of GST/HST to real property transactions can be complex, particularly when part of the property may include a residential component. This seminar will increase awareness of some of the important GST/HST issues associated with real property transactions.	Oct 20 Nov 03	9am-5pm 9am-5pm	**In-Person**, **Vancouver** Live Webinar
Income Tax - 5 Years of Developments This seminar provides an opportunity for financial professionals to remain updated on continual changes by reviewing the most important federal income tax developments that have occurred over the last five years.	Nov 12 Jan 27	9am-5pm 9am-5pm	Live Webinar Live Webinar
Income Tax - Administration and Risk Management This seminar is designed to help professional advisors reduce their exposure to liability in their tax practices. It will include a discussion of technical issues associated with the areas where CPA Professional Liability Plan Inc. claims experience show the greatest number and dollar value of claims. This seminar will also review the scheme of penalties and interest in the Income Tax Act, the CRA's current administrative policies, and the use of the Taxpayer Relief provisions to reduce the cost of penalties.	Nov 30	9am-5pm	Live Webinar
Income Tax - Advanced Planning Strategies This course identifies tax-planning opportunities that are particularly relevant to practitioners working with Canadian private corporations and high net worth individuals. The course utilizes practical examples to present planning opportunities, and will also provide a high-level review of anti-avoidance provisions frequently encountered in the context of these plans.	Nov 03 Dec 02 Feb 12	9am-5pm 9am-5pm 9am-5pm	**In-Person**, **Vancouver** Live Webinar Live Webinar

Income Tax - Consequences to Avoid In the world of tax, even straightforward and seemingly benign situations can trigger adverse income tax repercussions. This seminar will equip participants with the knowledge needed to identify, prevent, and manage such unintended or negative outcomes.	Nov 02	9am-5pm	Live Webinar
Income Tax - Employee Benefits This half-day seminar provides a review of the income tax implications for employee benefits, for both owner-managers and arm's length employees.	Dec 08	9am-12:30pm	Live Webinar
Income Tax - Everyday Issues for General Practitioners CPAs who assist clients with income tax compliance and planning find that routine matters can entail complexities, alternatives, and uncertainties. This seminar addresses income tax matters that practitioners frequently encounter and demonstrates how sometimes unexpected income tax rules apply to everyday situations.	Oct 30 Nov 10 Nov 27 Jan 25	9am-5pm 9am-5pm 9am-5pm 9am-5pm	Live Webinar **In-Person**, **Vancouver** Live Webinar Live Webinar
Income Tax - Income Splitting, A New Era The Income Tax Act contains several measures related to income splitting; and while some are permissive, most are restrictive. This full-day seminar covers the tax benefits of income splitting, provides a detailed review of relevant income tax legislation, including the expanded TOSI rules, and reviews remaining opportunities to accomplish income splitting.	Nov 18 Nov 25 Dec 14 Jan 29	9am-5pm 9am-5pm 9am-5pm 9am-5pm	**In-Person**, **Vancouver** Live Webinar Live Webinar Live Webinar
Income Tax - Partnerships The taxation of partnerships and their partners is quite different from that of corporations and their shareholders. This course reviews the manner in which partnerships and their partners are taxed, and provides participants with improved understanding of the "what" and "why" issues in preparing returns, to better advise and serve their clients or employers with partnerships.	Oct 23 Nov 27 Jan 22	9am-5pm 9am-5pm 9am-5pm	**In-Person**, **Vancouver** Live Webinar Live Webinar

Income Tax - Principal Residences Many Canadians own a principal residence, but they often assume that the gain on the sale of their home is tax free and may lack an understanding about the tax implications of other transactions involving these properties. This seminar examines all aspects of principal residences from a federal tax perspective, including ambiguous situations and the unexpected issues or outcomes that can arise in such cases.	Nov 04 Dec 03 Feb 24	9am-12:30pm 9am-12:30pm 9am-12:30pm	**In-Person**, **Vancouver** Live Webinar Live Webinar
Income Tax - Real Estate Real estate transactions usually involve large amounts of capital, and can be impacted significantly by tax rules and restrictions. This seminar identifies and reviews significant income taxation issues arising from various aspects of real estate activities and includes practical, business-focused suggestions for dealing with such issues.	Oct 21 Nov 23 Feb 11	9am-5pm 9am-5pm 9am-5pm	**In-Person**, **Vancouver** Live Webinar Live Webinar

Income Tax - Update 2020 Providing a high level summary of tax law changes in the past year, this seminar examines current changes and relevant issues in taxation that affect individuals and most businesses in the private sector.	Oct 14	9am-5pm	Live Webinar
	Oct 19	9am-5pm	Live Webinar
	Oct 22	9am-5pm	**In-Person**, **Vancouver**
	Oct 30	9am-5pm	Live Webinar
	Nov 05	9am-5pm	**In-Person**, **Vancouver**
	Nov 05	9am-5pm	Live Webinar
	Nov 09	9am-5pm	Live Webinar
	Nov 14	9am-5pm	Live Webinar
	Nov 16	9am-5pm	Live Webinar
	Nov 20	9am-5pm	Live Webinar
	Nov 30	9am-5pm	Live Webinar
	Dec 02	9am-5pm	Live Webinar
	Dec 04	9am-5pm	Live Webinar
	Dec 10	9am-5pm	Live Webinar
	Dec 12	9am-5pm	Live Webinar
	Dec 15	9am-5pm	Live Webinar
	Jan 14	9am-5pm	Live Webinar
	Jan 22	9am-5pm	Live Webinar
	Jan 27	9am-5pm	Live Webinar
	Feb 04	9am-5pm	**In-Person**, **Vancouver**
Personal Tax - Compliance and Planning in T1 Preparation This seminar presents a comprehensive review of income tax compliance and planning issues relevant to the preparation of Canadian personal income tax returns. The seminar's exploration of tax planning matters focuses on those that are, or can be, implemented in the course of preparing the tax returns rather than broader tax planning undertaken on a proactive basis outside of annual tax return preparation.	Dec 11	9am-5pm	Live Webinar
	Feb 04	9am-5pm	Live Webinar

Personal Tax - Review of Tax Planning This two-day seminar in personal tax is designed for those who desire to update and refresh their knowledge in both technical and tax planning issues for individuals, trusts and partnerships, with a primary focus on the taxation of individuals.	Two-segment Nov 13 & Nov 16	9am-5pm	Live Webinar
Probate Fee Avoidance Planning Review the fundamentals of when and why probate is required, and what property is subject to the process. Examine the various strategies that can be employed to avoid probate fees, and learn how individual strategies complement or hinder the achievement of other estate planning goals.	Nov 27	8am-10am	Live Webinar
PST - Review of Jurisdictional Sales Tax This seminar addresses the key topics around the policy intents and application of the provincial sales tax regimes in BC, Saskatchewan, Manitoba and Quebec. Participants will learn the major issues that can impact any business or organization operating in, or with customers in, these provinces and develop better knowledge of the differences between the various provincial sales taxes.	Nov 16	9am-5pm	Live Webinar
RIP - Estate and Testamentary Trust Returns This seminar provides a review of the issues faced when preparing trust filings for testamentary trusts and estates of deceased taxpayers. The focus is on the preparation of returns and related planning, including a review of relevant tax issues, engagement management, up-to-date sources of tax research, and CRA assessing practices.	Nov 12	9am-5pm	Live Webinar
RIP - Estate Planning This seminar provides a detailed review of important estate planning matters for practitioners or other financial professionals who deal with owner-managers or clients with a high net worth. Participants will develop a working understanding of how to initiate and undertake effective estate planning for clients.	Nov 19 Nov 23	9am-5pm 9am-5pm	**In-Person, Vancouver** Live Webinar

RIP - Terminal Filing This full-day seminar provides a detailed technical review of the numerous issues faced when preparing terminal or year-of-death filings. Specifically, the session emphasizes the preparation of returns and related planning for terminal filings.	Nov 05 Feb 11	9am-5pm 9am-5pm	**In-Person, Vancouver** Live Webinar
Tax for Controllers Controllers in small to mid-sized private companies have a wide range of responsibilities which can either have an impact on taxation or require tax related reporting. This two-day course is compliance oriented with high level review of a wide range of issues and focus on issue identification.	Four-segment Nov 17-Nov 20	9am-12:30pm	Live Webinar
NEW **Tax in Troubled Times** An economic downturn creates both tax opportunities and pitfalls. This two-hour seminar will provide an overview of select provisions relevant to losses, debt forgiveness and bankruptcies.	Nov 13	8am-10am	**In-Person, Vancouver**
Taxation - Registered Charities and NFPOs Registered charity and NFPO tax rules differ substantially from those that apply to corporations. This full-day seminar will provide a detailed technical review of the numerous income tax issues faced by registered charities and NFPOs, including real-world examples and case studies to provide participants with practical and useful takeaways.	Nov 10 Jan 26	9am-5pm 9am-5pm	Live Webinar Live Webinar
Taxation of Domestic Trusts - Fundamentals This seminar will provide an overview of trust relationships, how to complete basic returns for trusts (both inter vivos and testamentary) and their beneficiaries, and how to identify and communicate basic tax planning benefits and opportunities that involve family trusts.	Nov 13 Dec 04	9am-5pm 9am-5pm	**In-Person, Vancouver** Live Webinar

Taxation of Domestic Trusts - Advanced This seminar deals primarily with tax planning for trusts and potential traps and technical challenges that may be encountered in the course of tax planning, in both the inter vivos and testamentary trust context.	Nov 20	9am-5pm	**In-Person**, **Vancouver**
To Be or Not to Be: The Executor - Powers, Obligations and Liabilities Gain sufficient knowledge so that you or your clients can make informed decisions as to whether you or they should take on the executor's role. Learn and examine the stages of estate administration from date of death through to distribution, final accounting and release	Feb 25	8am-10am	**In-Person**, **Vancouver**
US Corporate Tax - Fundamentals 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.	Dec 10	9am-5pm	Live Webinar
US Personal Tax - Fundamentals This seminar will provide a general overview of the U.S. corporate taxation system, which includes the U.S. Internal Revenue Code and the way in which this code imposes tax and filing requirements on Canadian and U.S. corporations. Also covered are the treaty protections and relief offered to Canadian enterprises under the Canada-United States Income Tax Convention.	Jan 21	9am-5pm	Live Webinar

WEALTH MANAGEMENT

A Six Point Plan for Financial Freedom Designed for those interested in helping their friends, family, and clients to retire well without having to take risks, this course will detail the non-traditional view of money management that many investment advisors don't want to talk about.	Nov 03	9am-5pm	Live Webinar
Designing Retirement Income In this fast-paced webinar, learn about retirement cash flow considerations on retirement age, CPP, RRIF, income splitting, tax planning, estate factors, insurance and real estate.	Nov 30 Mar 16	9am-5pm 9am-5pm	Live Webinar Live Webinar
NEW **Everything You Need to Know about Government, Bank and Personal Debt** This course is on the subject many people don't want to think about: debt. It will delve into all you need to know about the subject from the federal to the provincial level, and will help you understand how debt fuels the world and how you can optimize your personal situation as a result.	Nov 18	9am-12:30pm	Live Webinar
How to Build an Investment Portfolio & Select Investment Products Join this fast-paced session with informative and direct commentary on today's investment landscape in Canada, and discover a six step approach to investment portfolio management. This seminar is not to be missed if you have an eye on investments, or want to better understand what your investment advisor is doing.	Dec 16	9am-5pm	Live Webinar
How to Prepare a Personal Financial Plan Delve into the world of personal financial planning, and learn how to prepare your own financial plan. Explore different planning areas, how to combine them into one overall plan, manage cash flow, determine priorities, decide among trade-offs, and how to update the plan over time.	Nov 20 Feb 22	9am-5pm 9am-5pm	Live Webinar Live Webinar

Smoke and Mirrors: Financial Myths that will Ruin Your Retirement Dreams There is a lot of confusion when it comes to retirement planning. This course will simplify the process of planning your retirement by pointing out the myths perpetuated by the financial services industry that make them money at your expense.	Oct 30	9am-5pm	Live Webinar
The Procrastinator's Guide to Retirement This course is designed to show you that it is possible to plan for retirement later in life. In fact, if you play your cards right, you can build a significant nest-egg in as little as ten years or less. And don't worry if you are younger, as all the concepts will still be useful to you.	Nov 10	9am-5pm	Live Webinar
The Simplest Personal Finance Strategy Ever This course is designed to show you the dangers that exist with a net worth focus. Delve into a much better strategy – The Cash Cow Strategy – that focuses on the cash flow implications of everything you acquire from now on rather than where they go on a net worth statement.	Nov 06	9am-5pm	Live Webinar

PD NEXUS

PD Nexus: Business and Innovation Insights This popular semi-annual Nexus Day offers a unique learning experience where you can keep up with new developments in our ever-changing business environment. Two learning streams will be available. In a combination of plenary and breakout sessions, you'll hear from subject matter experts and industry leaders who will help you learn, grow and develop as a business leader.	Dec 08	8:30am-4:30pm	Live Webinar
PD Nexus: Diversity, Equity, and Inclusion Insights This timely and unique Nexus Day comes to you in a new half-day format. This year with the spotlight on the Black Lives Matter movement, there is a growing call to individuals and corporate Canada to address equality, diversity and inclusivity and to move the dial on inclusion. In a combination of plenary and breakout sessions, you'll gain the tools needed to address how you and your organization can do better and be part of the solution.	Nov 26	8:30am-1pm	Live Webinar
PD Nexus: Public Practice Insights This annual Nexus Day, designed especially for our public practitioners, comes to you in a new half-day format. Don't miss this unique and practical learning opportunity. Select from a choice of breakout sessions to update your technical knowledge and address some key changes and challenges in professional practice in BC today.	Nov 18	8:30am-1pm	Live Webinar

PD PASSPORTS

Your most economical, cost effective and convenient savings program

Bulk Savings
The more you learn, the more you save

Early Bird Discount
Purchase by **Sep 25, 2020**

Special Discount
Additional 10% discount for this year

PASSPORT DAYS → PASSPORT CREDITS = MORE FLEXIBILITY

EXCLUSIVE DISCOUNTING FOR
POTENTIAL SAVINGS:
20-40%
OFF SEMINAR PRICES
2020-2021 PASSPORT SEASON

Actual savings will depend on your PD Passport usage – the more you learn, the more you save – but passport credits can be used in any combination of two-hour, half-day, or one- to two-day CPABC PD seminars, as well as PD Nexus Days, CPABC certificate programs, and web-based seminars that are passport-valid.

CPABC
PD Passports

PD PASSPORTS

Beginning September 2020, the passport measurement unit will shift from "days" to "credits" to help better align passport units to the learning value of in-person and online seminar options. For example, previously most seminars that had a "1 Passport Day" unit are now valued at "10 Passport Credits"; recorded online products that were previously valued at "1 Passport Day" may now require only "6 Passport Credits". Credits for each seminar and product will be indicated with their descriptions.

EARLY BIRD DISCOUNT
Sep 25
2020
PURCHASE BY

Personal PD Passport

For designated CPABC **members only, (non-transferable)**.

Each PD Passport is now equivalent to **60 credits** of passport-valid CPABC PD seminars.

Early bird price $1,450 | Regular price $1,650

With the additional 10% Special Discount for this year:
Early bird price $1,305 | **Regular price** $1,485

60
CREDITS

AN EXAMPLE OF POTENTIAL SAVINGS

4 one-day seminars (40 credits)
3 half-day seminars (15 credits)
2 online PD (4 credits)
1 online PD (1 credit)

Without Personal PD Passport = $2,175
1 Personal PD Passport = $1,305

You could save $870 *or 40% discount*

Flexi PD Passport

Can be purchased by both **members and non-members**, fully transferable.

Each Flexi PD Passport is equivalent to **60 credits** of passport-valid CPABC Professional Development seminars.

Early bird price $1,850 | Regular price $2,050

With the additional 10% Special Discount for this year:
Early bird price $1,665 | Regular price $1,845

60
CREDITS

AN EXAMPLE OF POTENTIAL SAVINGS

3 one-day seminars (30 credits)
1 PD Nexus Days (12 credits)
3 half-day seminars (15 credits)
1 online PD (3 credits)

Without Flexi PD Passport = $2,110
1 Flexi PD Passport = $1,665

You could save $445 *or 21% discount*

Mini PD Passport NEW

For designated CPABC **members only, non-transferable**.

Each PD Passport is now equivalent to **30 credits** of passport-valid CPABC PD seminars.

Early bird price $899 | Regular price $999

With the additional 10% Special Discount for this year:
Early bird price $809 | Regular price $899

30
CREDITS

AN EXAMPLE OF POTENTIAL SAVINGS

2 one-day seminars (20 credits)
2 half-day seminars (10 credits)

Without Mini PD Passport = $1,080
1 Mini PD Passport = $809

You could save $271 or *25% discount*

PD NEXUS DAYS GO VIRTUAL FOR FALL 2020

PD Nexus Days are unique PD 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.

Public Practice Insights

November 18, 2020
(Half Day AM)
PD Passport Valid:
7 Credits | $220

This annual Nexus Day, designed especially for our public practitioners, comes to you in a new half-day format. Don't miss this unique and practical learning opportunity offering a mix of plenary and breakout sessions where you'll update your technical knowledge and address key changes and challenges facing public practice and practitioners.

Diversity, Equity, and Inclusion Insights

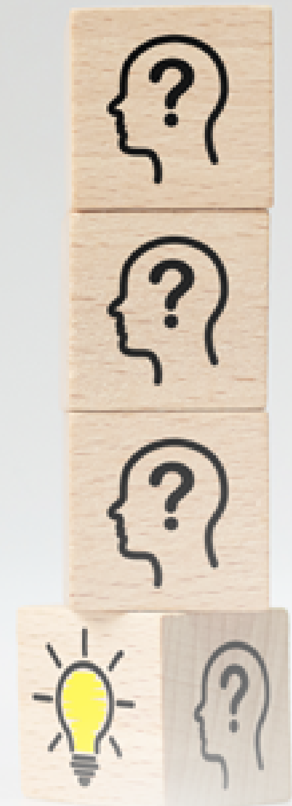
November 26, 2020
(Half Day AM)
PD Passport Valid:
7 Credits | $220

This timely and unique Nexus Day comes to you in a new half-day format. With the increased awareness of movements like Black Lives Matter, there is a growing call to individuals and corporate Canada to address equality, diversity, and inclusivity as organizations strive for greater inclusion. In a combination of plenary and breakout sessions, you'll gain the tools needed to address how you and your organization can improve your diversity, equity, and inclusion initiatives.

Business and Innovation Insights

December 9, 2020
(Full Day)
PD Passport Valid:
12 Credits | $380

This popular semi-annual Nexus Day enables you to keep up with new developments in an ever-changing business environment. Choose from two learning streams with a combination of plenary and breakout sessions. Hear from subject matter experts and industry leaders who will help you learn, grow, and develop as a business leader.



CPABC
Nexus Days

» **PRICING** Already reflects discount


EXECUTIVE PROGRAMS
Moving You **Forward**
Discover how you can move yourself and your organization forward with CPABC's Executive Programs.
CPABC
Executive Programs

CONTROLLER'S PROGRAM

Created with the aspiring and new Controller in mind.

The Controller's Operational Skills Program focuses on the core technical processes and procedures of the financial role.

Summary As part of the CPABC Controllership Program, The Controller's Operational Skills Program will focus on core technical and operational skills. The Controller's Management Program will focus on management soft skills. You can choose to complete only one of these programs, but if you complete both components you will receive the CPABC Controllership Program Certificate. They can be completed in any order as they focus on separate and distinct skills.

September 16-19 &
November 18-21, 2020
(Online)

2021 dates TBA

The Controller's Management Program focuses on honing your personal and interpersonal effectiveness.

Summary As part of the CPABC Controllership Program, The Controller's Management Program will focus on management soft skills. The Controller's Operational Skills Program will focus on core technical and operational skills. You can choose to complete only one of these programs, but if you complete both components you will receive the CPABC Controllership Program Certificate. They can be completed in any order as they focus on separate and distinct skills.

September 21-22 &
September 28-29, 2020
(Online, Split Days)

2021 dates TBA

CFO'S PROGRAM

Geared towards aspiring and new CFOs.

The CFO's Leadership Program focuses on developing the skills needed to be an influential leader in your organization.

Summary As part of the CPABC CFO Program, The CFO's Leadership Program will focus on management soft skills. The CFO's Operational Skills Program will focus on core technical and operational skills. You can choose to complete only one of these programs, but if you complete both components you will receive the CPABC CFO Program Certificate. They can be completed in any order as they focus on separate and distinct skills.

October 22-23 &
October 29-30, 2020
(Online, Split Days)

2021 dates TBA

2021 SESSIONS

Dates To Be Announced

ENTERPRISE RISK MANAGEMENT FUNDAMENTALS

Geared towards financial professionals seeking knowledge in risk managment.

The Enterprise Risk Management Program is a stand-alone program for financial professionals of any level who are seeking to learn fundamentals and best practices in enterprise risk management.

THE OPTIMAL NEGOTIATOR

Geared towards professionals seeking negotiation mastery.

The Optimal Negotiator Program is a stand-alone program for professionals of any level who are seeking to obtain greater comfort and confidence in their resolve to get others to agree with them, or who aspire to master the art of negotiation.

2021 SESSIONS continued

Dates To Be Announced

GOVERNING WITH INTENTION™

Geared towards directors and professionals who play a role in their organization's governance.

Governing with Intention™ is a stand-alone program for current or incoming directors and professionals seeking leading governance best practices, to elevate their personal and their board's contribution at the board table, and the skills to navigate the modern boardroom.

CFO'S OPERATIONAL SKILLS PROGRAM

Geared towards aspiring and new CFOs.

The CFO's Operational Skills Program focuses on the strategic technical competencies of the role.

CFO AS NAVIGATOR PROGRAM

Geared towards seasoned financial executives.

The CFO as Navigator Program is a stand-alone advanced program for more seasoned financial executives; it builds upon the foundational skills and concepts that add value and enhance the role within the organization.

THE CEO PROGRAM

Geared towards current and aspiring leaders.

The CEO Program is a practical and provocative stand-alone advanced program for current and aspiring leaders seeking to excel in the executive suite.

Faculty

TERESA BUDD, BA, LLB, collaborates with WATSON as a governance consultant with 20 years' experience in governance and law in both Vancouver and Toronto. She has worked with private and public companies, Crown agencies, municipal corporations, member-based organizations, regulatory bodies, and not-for-profit organizations. Teresa conducts governance reviews, board evaluations, corporate secretarial practice assessments, and supports multiple boards as an outsourced corporate secretary. She is a facilitator in WATSON's Governance Academy delivering governance education programs to both individual directors and boards.

TERESA FACILITATES
Governing with Intention™

DR. VIJAY JOG is the Founder-President of Corporate Renaissance Group, a firm dedicated to driving better business management and performance. He has led CRGroup's growth in areas of strategic finance, corporate performance and dashboards, FP&A and analytics, strategy design and execution, helping clients bridge 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.

VIJAY FACILITATES
The CFO as Navigator Program

LINDA LUCAS, CPA, CMA provides CEO, COO and CFO services to small- and medium-sized companies throughout the Lower Mainland in BC. Drawing on over 20 years' experience in strategic, operational and financial management, Linda specializes in helping business owners identify and execute their strategic objectives, build strong teams, and achieve operational excellence.

LINDA CO-FACILITATES
The Controller's Management Program

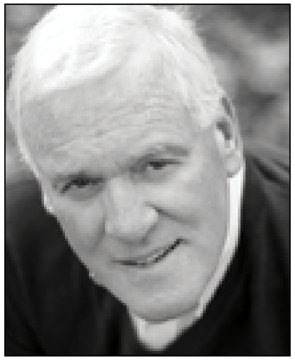
MIA MAKI, BA, MBA, FCPA, FCMA, is a Principal of a consulting firm and a Professor with the University of Victoria Gustavson School of Business, with over 20 years of teaching experience. She has worked in finance and accounting since 1986 and has experience in a wide variety of industries, including audio technology, airlines and aviation, not-for-profit, public accounting, marine transportation, fisheries monitoring, gaming, and other technology arenas.

MIA FACILITATES
The Controller's Operational Skills Program

LESLEY-ANN MARRIOTT, CEC, PCC, is a Certified Executive Coach who holds the advanced credential of Professional Certified Coach. A former executive in the food industry, Lesley-Ann has over 25 years of leadership and management experience. She has facilitated hundreds of corporate partnerships at the most senior levels of the world's largest food companies - Coca-Cola, Procter & Gamble, and she negotiated contracts in excess of $50 million and managed sales of over $2.5 billion based on dynamic, collaborative partnerships.

LESLEY-ANN CO-FACILITATES
The Controller's Management Program
The CFO's Leadership Program

Faculty



DR. JIM MURRAY is CEO of *optimal solutions international*, a firm dedicated to helping people achieve their full potential.

Jim has taught courses for CPABC since 1982. He is the architect of several advanced residential programs for five provincial CPA bodies, has published four best-selling books, and provided his strategic counsel to well over 600 organizations. He has been nationally honoured by the university community and formally recognized for "excellence in the design and delivery of life-long learning". His full bio is on SmartLeaders.ca.

JIM FACILITATES
The Optimal Negotiator
The CEO Program

JEFFREY D. SHERMAN, MBA, CIM, FCPA, FCA (Ontario), has over 25 years experience as an executive and corporate director in high tech, biotechnology/medical, financial services, and business services. He is a popular presenter, a frequent course director and course author for many organizations, and has created and presents executive development programs and one-day seminars for most provincial Chartered Professional Accountants organizations across Canada. He has written over twenty books including *Strategy and Planning Toolkit for Small and Medium Businesses* (published by CPA Canada).

JEFFREY FACILITATES
The CFO's Operational Skills Program

TAMMY TOWILL, MBA, FCPA, FCMA is a partner in the Cordura Group and faculty with Capilano University, providing business advisory services and related education and training programs to organizations and communities seeking growth or change. For over 25 years, Tammy has worked with private and public sector companies throughout North America and Europe, providing education, training and facilitating in the areas of leadership, strategy, business planning, and curriculum development and implementation. She has served on and worked with several boards in Canada and the US.

TAMMY CO-FACILITATES
The CFO's Leadership Program

WILLIAM (BILL) WESIOLY, CPA, CMA (Ontario), is a Risk Management consultant. His background is in the financial services industry, first with BMO and then with RBC. The last 15 years of his banking career was in successfully building and leading risk management programs.

He currently teaches with CPA Ontario and CPAs in other provinces including CPABC.
His recent consulting assignments included Buduchnist Credit Union, Hillfield Strathallan College, Canadian Stewardship Services Alliance, Ministry of Environment Canada - Great Lakes Region, and the Ktunaxa First Nations.

BILL FACILITATES
Enterprise Risk Management Fundamentals

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.

» **EXCLUSIVE PRICING** Discounted pricing for these programs won't last....

Strategic Management

This four-module program focuses specifically on the critical components of leadership and strategy: **Strategic Planning; Risk Management and Governance**; **Team Development**; and **Change Management**. Upon completion of all four modules, which do not need to be taken in any order, members will qualify for the Strategic Management Certificate.

Why take this program?

At completion, participants will have learned about the core competencies to successfully develop teams, enable change management within their organizations, risk assessment and governance best practices, and how to guide strategic planning into implementation through all phases of an organization's product/service life cycle.

Who is this program designed 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.

Advanced Strategic Management

This two-module program focuses on integrating frameworks and strategic plan implementation, through the application of critical components of leadership and strategy. 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. Upon completion of the two modules – **Strategy: Maps**; and **Strategy: Links**, members will qualify for the Advanced Strategic Management Certificate. Completion of the Strategic Management Certificate Program is not a pre-requisite.

Why take this program?

At completion, participants will be able to demonstrate the ability to apply frameworks, best practices and models to different organizational scenarios, through case work and application to their organizations.e.

Who is this program designed 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.

NEW Resilient Leadership

The five-part Resilient Leadership Certificate modules are:

- The Five Qualities of a Leader Who Thrives in a Crisis
- Energize Your Team Through Uncertainty
- Who's Listening?
- Manage Your Mindset and Emotional Well-being
- Balance Life, Work, and Overwhelm.

Each module can be taken as a stand-alone course, and modules will build on each other. However, in order to qualify for the Resilient Leadership Certificate, participants are required to complete all five modules.

Why take this program?

Right now, in this once-in-a-century crisis, leaders have extraordinary challenges. Resilient leadership is the first one. Without resilient leadership it will be impossible to have healthy employees who care about your business and who feel committed and invested enough to work hard on new solutions with hope, optimism, and sustained energy. This program will enable you to learn strategies and acquire tools to both be an example of resilience and build a resilient team.

Who is this program designed for?

This program is designed for leaders and emerging leaders at all levels who want to create a workplace culture that can recover, re-build, support people to do their best work, and create new opportunities for success and impact.

» **SAVE MORE** Register for all five modules of the Resilient Leadership Certificate for a reduced price

Faculty

STRATEGIC MANAGEMENT & ADVANCED STRATEGIC MANAGEMENT

MIA MAKI, BA, MBA, FCPA, FCMA is a Principal of a consulting firm and a Professor with the University of Victoria Gustavson School of Business, with over 20 years of teaching experience.

BARBARA VANDERLINDEN, FCPA, FCMA is the principal at View Consulting. She has been an instructor at Camosun College, Royal Roads University and UVIC focusing on managerial accounting.

RESILIENT LEADERSHIP

TAMMY ROBERTSON, MA is a life and leadership coach to leaders in industry and public practice, and has over 25 years of experience providing leadership and personal development seminars and keynotes.

» **LISTEN** How can you be a resilient leader? Listen to our podcast with Tammy Robertson

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 and analysis (FP&A), corporate development, treasury, investor relations, and capital markets. Archived webinars are available to CPABC members at a special price and are also PD Passport valid.

CFI **OFFERINGS**

NEW CPA Crossings

CPA Crossings is a global leader in online professional education for CPAs and other financial professionals. Established in 2001, CPA Crossings offers scheduled webinars on a range of topics including ethics, fraud, business, personal development, technology, and other fields of study. All of these courses are developed and presented by a team of 60 instructors, recognized as experts in their respective fields of study.

COURSE TITLES COMING SOON
Visit pd.bccpa.ca
for updates

NEW Business Learning Institute (BLI)

Business Learning Institute (BLI) is a center facilitating the development and sharing of competencies and strategic knowledge required for leadership in today's rapidly-changing business environment. While BLI is equipped to serve all business sectors, it was originally founded to meet the needs of accounting and finance professionals. BLI provides the training and skills needed to help you advance professionally and innovate thoughtfully. BLI offers both synchronous (live) and asynchronous (on-demand) seminars on a wide range of topics, with a focus on leadership, technology, communication, and personal and career development.

COURSE TITLES COMING SOON
Visit pd.bccpa.ca
for updates

NEW Executive Finance

Executive Finance is a hands-on, experiential-based thought leadership lab for financial professionals. Executive Finance curates the best ideas they can find, then tests these ideas with companies to develop tools, methodologies, and executive development courses. Their partners work in finance as executives, corporate directors, educators, speakers, and authors – many times simultaneously, which makes for rich content and stories. In general, Executive Finance's online courses focus on developing financial professionals to become financial executives; they also offer courses for newer financial professionals in areas such as ethics, financial analysis, and corporate finance.

COURSE TITLES COMING SOON
Visit pd.bccpa.ca
for updates

K2E Canada Inc

Technology-Focused Webinars

CPABC in partnership with K2E Canada Inc are pleased to present technology-focused webinars to our members. Participants who take these webinars will have the opportunity to learn from an award-winning team of instructors with literally hundreds of years of experience in helping professionals identify, address, and solve issues through the practical application of technology. Webinars address a variety of topics, including Excel, QuickBooks, PDFs, accounting solutions, and Microsoft Office and are available both as live presentations and in an on demand format.

K2E **OFFERINGS**

NEW LumiQ

LumiQ is a podcast company where engaging conversations with business leaders also count as verifiable CPD. We go out and find business, accounting and finance leaders to interview about their expertise and experiences, and you get verifiable CPD for learning from the world's top minds. Some days, you'll find yourself immersed in the world of start-ups, or captivated with the story of how Bernie Madoff pulled off the largest fraud in human history. Maybe you'll want to learn about how the music industry's business model has changed over time? Whatever you're interested in and will feed your natural curiosity of how businesses work, you'll find on the LumiQ podcast. LumiQ is an enjoyable way to earn CPD.

LumiQ **OFFERINGS**

ProDio Audio Learning Inc

CPABC is pleased to continue to partner with ProDio Audio Learning Inc. (ProDio), which 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, audio-only courses that are engaging and concise, testing your learning along the way. Course content includes expert interviews, stories, 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.

ProDio **OFFERINGS**

CPABC PD Video On-Demand

PD Video On-Demand

CPABC has video recorded live, in-person offerings and made these seminars 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. Dates published with the on-demand titles reflect when the videos were recorded – information presented was up-do-date at the time of recording. Each title qualifies for verifiable CPD hours upon successful completion of a quiz at the end of the seminar.

PD Video **OFFERINGS**

PD AudioWeb

PD AudioWeb seminars are direct audio recordings from live PD seminars; corresponding PowerPoint visuals and instructor materials are available as MP4 and PDF files respectively. PD AudioWeb seminars 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.

PD AudioWeb **OFFERINGS**

How to search for these offerings

Use the Keywords search field and type "LumiQ", "Executive Finance", "CPA Crossings", or "BLI". Existing partners include "CFI", "K2E", and "ProDio".

For CPABC Video On-Demand or PD AudioWeb titles, use the Keywords search field and type "Video On-Demand" or "AudioWeb".

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 in 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.

CONVENIENT 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 gaining 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

Paperless Seminar Materials & Online Services

Frequently Asked Questions

What are the benefits of paperless seminar materials?

With the growing popularity of digital materials, and in conjunction with an enhanced Online Service Portal for CPABC PD, we launched our paperless initiative in February 2019 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; and
- fall in line with CPA PD programs across the country that have adopted paperless materials for their membership.

Are all seminar materials going to be paperless?

With the exception of Executive Programs, all seminar materials are now paperless. Previously, print copies were available for purchase for select courses, but due to COVID-19 all seminars will go paperless to minimize the number of touch points.

Do all seminar materials have a print option?

No, we no longer offer a print option.

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 select Your Seminars and Materials (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 two business days prior to the seminar start date and for up to one month after the seminar date.

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

Your paperless course materials will be in a zipped file. A zipped file is a file format that compresses multiple files into one folder. Course materials will most often be in PDF format; some may contain Word and/or Excel files. After you have downloaded the zipped 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 course 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 (various free apps are available) 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 will use during the class.

What should I bring to the course for in-person offerings?

Prior to attending the seminar, ensure you have a fully charged electronic device (laptop/tablet/iPad) preloaded with the course materials, 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. 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 course material content, you will be able to annotate and make comments. Visit the CPABC website for tips on how to annotate PDF files.

Discounted Pricing for the Fall/Winter Program

Although the COVID-19 pandemic has affected our working and learning environments in many unplanned ways, there is still an ongoing need for professional development. To help keep PD courses accessible, CPABC has introduced adjusted pricing for the fall/winter program. Visit pd.bccpa.ca for more information and updates on discounted pricing.

20% off individual PD seminars

A 20% discount will be applied to in-person courses, live webinars, and select on-demand virtual products dated through to March 31, 2020. Some CPABC PD products may be excluded from this offer.

10% off PD passports

A 10% discount will be applied to all 2020-2021 PD passports purchased. The PD Passport program is a savings program for individuals who plan to take multiple CPABC PD seminars throughout the year. Depending on the type of passport chosen, PD passport holders are entitled to 30-60 PD credits that can be applied toward passport-eligible seminars.

Registration & Payment

Confirmation of Registration

A confirmation of registration will be emailed to the registrant no later than 1 business day upon receipt of registration. If you do not receive your confirmation prior to the course date, please contact the PD Department at pdreg@bccpa.ca. The confirmation notice is provided as a courtesy - all assessments apply whether or not a registrant receives a confirmation notice.

Seminar Venues & Dates

Seminar venues for in-person offerings and seminar dates for all offerings are subject to change. Every effort is made to ensure that current information is available. Please check the PD website for the latest information on the status of seminars.

Registration Cancellations, Transfers & Refunds

In light in COVID-19 and the many uncertainties it presents, CPABC will be waiving our $25 and $50 cancellation fee on registrations to CPABC PD seminars held through to March 31, 2021.

This only applies to emailed cancellation requests received before 7:00AM two business days prior to the seminar start date. Cancellations will not be accepted after this time, and full course fees, or full passport credits, will apply.

CPABC incurs overhead costs that cannot be avoided unless cancellations are received in advance of the deadlines. If cancellations are received after the deadline, fees to cover these costs will apply.

All cancellations and/or transfers must be received in writing. Telephone notifications will not be accepted.

Registrants who do not show up for a seminar, and/or who do not notify CPABC PD in writing at least two 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.

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.

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 unforeseen scheduling issues, we reserve the right to substitute a fully qualified speaker who is not listed in the course description.

Meals for In-Person Seminars

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 for free PD sessions. If you have allergies or special meal considerations, please let us know at the time of registration.

Web-Based Seminars

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.

Flexi PD Passport Registrations

Note that individuals using the Flexi PD Passport are providing consent to share that registration information with the “principal holder” (or official passport contact person) of that Flexi PD Passport.

Audio/Video Recording & 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.

Payment of seminar fees are due at the time of registration, as we do not invoice for seminar registrations. We accept Visa and Mastercard but please do not include your credit card information in any email correspondence. Cheques should be made payable to CPABC.
All registrations are subject to GST regardless of employer or employment status.


Did You Know?
The BC 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.
Learn more at pd.bccpa.ca

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