CPA CHARTERED PROFESSIONAL ACCOUNTANTS BRITISH COLUMBIA

FALL | WINTER 2022-23

Professional Development
LIFELONG LEARNING

Fall/Winter 2022-2023

Creating a path on your lifelong learning journey

As the world continues to evolve, your lifelong learning journey should be one that opens up new roads which allow for growth and advancement.

CPABC PD's upcoming fall/winter PD program wants to help you accomplish just that. It provides the quality content you've come to expect – seminars and programs that will not only enhance your technical skills in accounting, finance, tax, and wealth management, but also create opportunities for you to become a more well-rounded professional skilled in self-management, leadership, and negotiation. Titles in business transformation, software and tools will also help to keep you current and efficient.

For a limited time, members will also continue to receive a 20% discount towards in-person seminars, live webinars, PD Nexus Days, and selected on-demand products.

With the easing of public health restrictions, we are delivering a larger number of courses in person once again, and will bring several offerings to venues outside of Vancouver beginning this fall. We hope to see you in Coquitlam, Kamloops, Kelowna, Prince George, Richmond, Surrey, and Victoria later this year! We do recognize that many of our members, for various reasons, still have a preference for live webinars and on-demand learning, so we will continue to make the majority of our titles available through online learning platforms.

We are very excited to bring you three new certificate programs: Virtual Presentation Design and Delivery, CPA Firm Manager Leadership Skills, and Advanced Resilient Leadership, as well as two new PD Series: Women's Leadership, and Hot Topics in Tax. In addition, we've added over 20 new seminar titles to our program this fall and winter, along with a variety of new titles delivered through partnerships with third-party online education providers.

We'd like to acknowledge our talented pool of instructors, facilitators, and speakers who put time and effort into presenting relevant and engaging content through both online and in-person platforms. Meet some of these instructors – see page 9.

And thank you for continuing to participate in and support your CPABC PD program.

Your CPABC Professional Development Team

Your Fall-Winter 2022-23 PD Program

YOU CAN SELECT FROM

450+
LIVE SEMINARS

- 350+
  Online Virtual
- 90+
  In-Person

410+
On-Demand Seminars

450+
Seminar Titles

QUALITY LEARNING OPPORTUNITIES

4.24/5
Average Course Rating
May 2021-Jul 2022

5/5
Highest Course Rating
May 2021-Jul 2022

FEEDBACK BASED ON

- 650
  seminar offerings
- 23,300
  registrations

TABLE OF CONTENTS

92 | PD Passports

105 | Certificate Programs

113 | In-House Presentations

New Initiatives & Highlights

Seminar Schedule

PD Passports

PD Nexus Days

Executive Programs

Certificate Programs

Online Learning Partners

NEW Women's Leadership Series

Any journey is best shared. Women and men both need to develop skills to be successful in their careers. However, the manner in which many women experience their career journey is different from their male counterparts.

CPABC PD is excited to launch a new series focused on developing skills, knowledge, and connections to support women in the accounting profession to move forward in their career and leadership journeys.

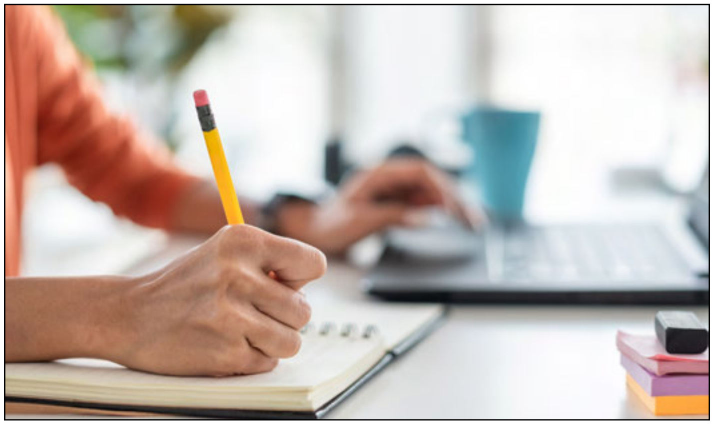
What it includes:

- Career Navigation for Women Workshop
- Monthly 1.5 hour seminars from October to March on topics applicable to a female CPA's leadership and career development journey
- Monthly engagement sessions to build relationships and apply learning

Seminars will be offered in a virtual live format, with an on-demand version available afterwards for those who registered but were unable to attend.

Seminar details will be available on our website soon.

» **READ MORE** Learn more, save more. See page 92-93 for how you can save money by purchasing a PD Passport.



NEW Hot Topics in Tax Series

The world of tax is constantly changing. This series of PD seminars will provide updates on current announcements and other hot topics in tax once per month. Sign up to stay up to date and receive highlights of what you need to know as proposed tax rule changes are enacted.

CPABC PD brings you this new series designed to highlight emerging tax changes as they are announced, and to provide a monthly update on a current area of tax of importance to CPAs in both industry and public practice.

What it includes:

- Monthly 1.5 hour seminars from October to February
- Topics will be determined based on new and noteworthy developments in the world of tax at the time of the seminar
- Seminars will complement other PD tax courses by providing short highlights, augmenting what is covered by our in-depth courses

Seminars will be offered in a virtual live format, with the on-demand version available afterwards for those who registered but were unable to attend.

Seminar details will be available on our website soon.

Seminar Schedule
PD Passports
Nexus Days
Executive Programs
Certificate Programs

NEW Seminars for Fall/Winter 2022-23

Accounting & Assurance

- ASPE - Agriculture (3041) New Standard
- Audit Engagements - Application of CAS 315 Revised Standard
- Audit Engagements - Application of the Standards Using PEG
- ASPE - Revenue Recognition (3400)
- How to Establish and Optimize Fraud Risk Management Programs
- Quality Management - Application of CSQM 1 and 2 for Providers of Assurance Services New Standards
- Quality Management - Overview of CSQM 1 and 2 for Providers of Compilation and Other Non-Assurance Services (New Standards)
- New Insights on Profit and Risk

Ethics

- Ethics - More than just a Code of Conduct

People Management & Personal Development

- Entrepreneurial Accountant: Stop Managing, Start Leading
- Productivity Hacks for Busy Accountants
- The Power of Habit

Strategy, Governance & HR

- Managing the New Hybrid Workplace
- The Critical Role of Management in Board and Committee Meetings
- Why Successful Companies Fail: Forewarned is Forearmed

Taxation

- Income Tax - Investment Income

Technology & Innovation

- Digital Transformation Toolbox - Preparing for the future of Accounting
- Everything Google! Their Most Effective Tools, Apps and Services

» **READ MORE** Learn more, save more. See page 92-93 for how you can save money by purchasing a PD Passport.

NEW Virtual Presentation Design and Delivery Certificate Program

For the foreseeable future, delivering virtual presentations to internal and external audiences will be a critical professional skill.

NEW CPA Firm Manager Leadership Skills Certificate Program

Demonstrate to CPA firms that you have learned the communication and productivity skills that are key to being a manager.

NEW Advanced Resilient Leadership Certificate Program

This program is an integrated set of reflections, and practical, applicable exercises for anyone interested in creating a culture where people can thrive and do their best work.

» **READ MORE** See page 105 for more information on our certificate programs

Coming this Fall: Two value-packed PD Nexus Days!

VIRTUAL
Public Practice INSIGHTS

The must-attend Nexus Day for public practitioners, Public Practice Insights will take place on November 22. The theme this year is "Strength Beyond Numbers" – plan to attend to hear our subject matter experts discuss what gets accountants into trouble in the plenary session. You will be able to select from two streams of content throughout the day. Learn and share best practices on surviving and thriving in public practice.

IN-PERSON
Business & Innovation INSIGHTS

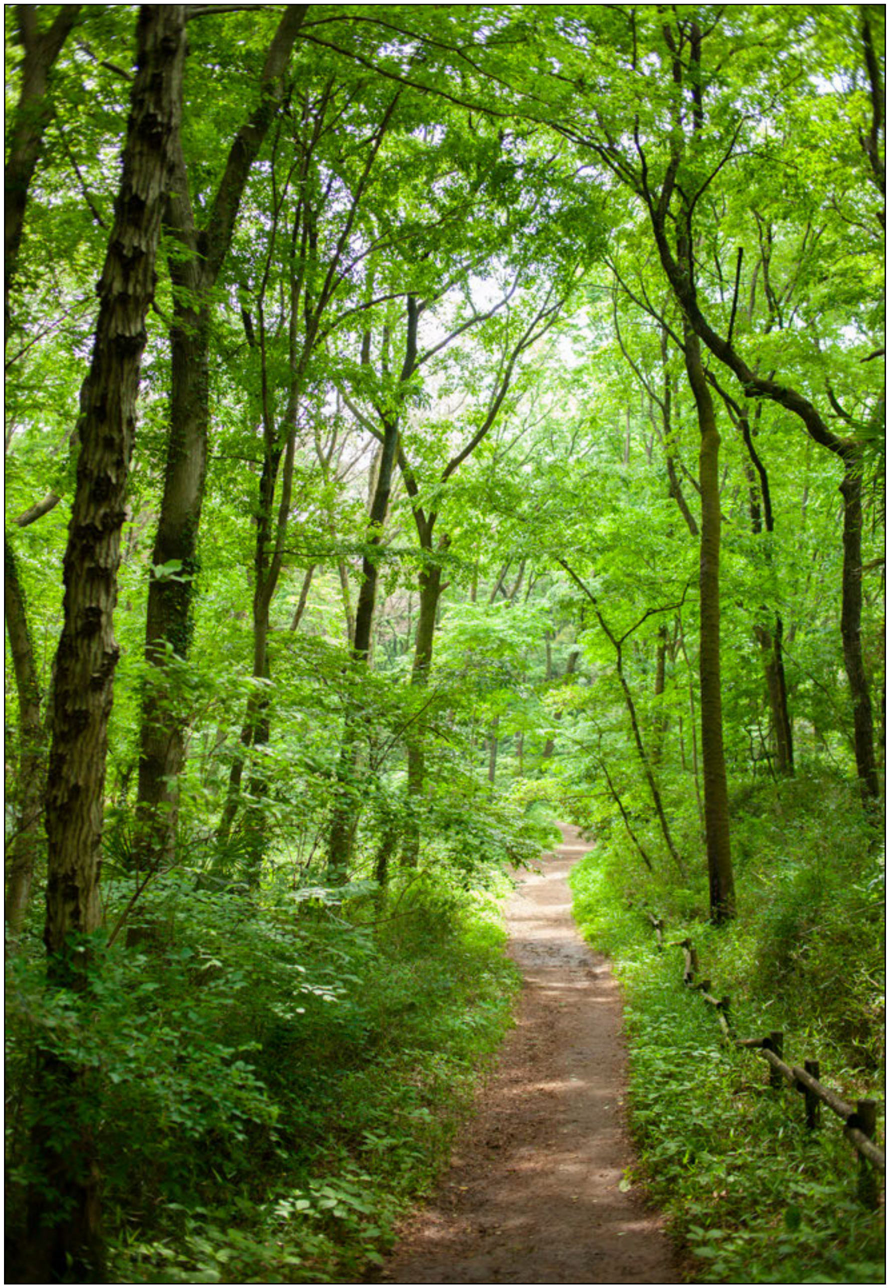
Our 2022 Nexus season will conclude with the popular Business & Innovation Insights on December 7. Featuring keynotes from Laura Friedrich on ethics and technology, and Michael King on the strategic imperative of sustainability, this value packed day will also offer two breakout streams to choose from.

» **READ MORE** About our Fall/Winter Nexus Days offerings on page 94.

NEW On-Demand Partners

Fans of on-demand learning will be happy to know that CPABC PD is working on adding new vendor partners to increase our line-up of on-demand titles.

Browse our e-learning page on the website over the upcoming weeks to learn more about these new additions.



Lifelong learning – where are you in your journey?

Lifelong learning is the foundation upon which your professional development goals should be built, and a concept that no professional accountant should take for granted. New knowledge should always be embraced, and existing knowledge can always be reevaluated.

CPABC PD's goal is to provide you with the skills and knowledge to create a smoother path on your lifelong learning journey.

At the starting line

You're a fairly new CPA – what types of challenges do you face? This is a good time to take stock of any gaps in both enabling skills and technical knowledge that will help you succeed in your role.

Is communication the challenge? Do you find it difficult to get your point across or feel unsure about presenting? This may be the perfect time to explore how to create better outcomes when conversing with difficult people, or polish up your presentation skills. Or are you concerned about being an effective team member?

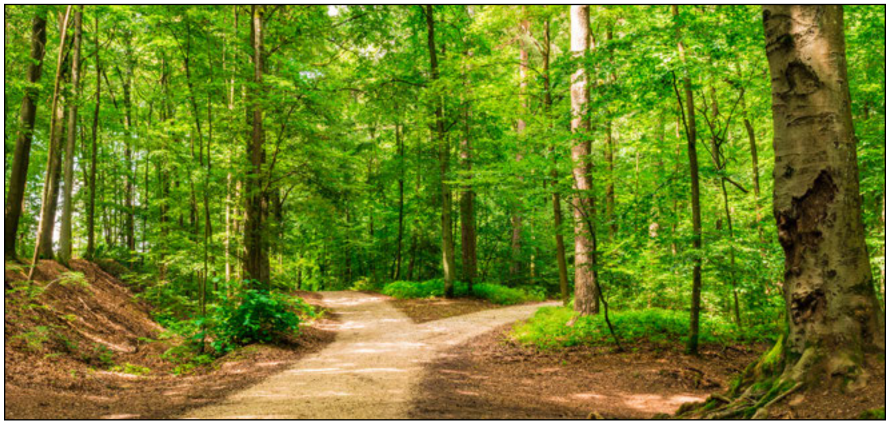
Maybe you need tools to improve work efficiency – especially if you're working with budgets, forecasts, and projects that require intermediate use of spreadsheets.

If technical information is what you need, CPABC PD offers a large inventory of accounting, management accounting, and taxation courses.

Make sure to note the course level – you may want to focus on those listed as introductory. In the end though, you are the best judge of your knowledge level, so don't let yourself be restrained by a label. See more information on course levels, and course description terminology.

Making headway – what's next?

Is it time for an upgrade? You've been given more supervisory and decision-making responsibilities – maybe it's time to enhance your leadership and critical thinking skills. According to this Harvard Business School article, effective leaders consciously invest



time and energy to develop skills that empower them to lead others. Explore how you can train your brain for leadership, influence without authority, and make a successful transition from subject matter expert to team leader.

Are you up-to-date on technology trends, threats, and tools? Keeping current in business technology and innovation produces a competitive advantage for organizations, and this is also true at the individual level. Leverage digital transformation and discover how it's reinventing accounting, be up-to-date on blockchain issues, and dive into data analytics. Or perhaps you need to re-learn certain tools to help you become more efficient and proficient at what you do.

Facing a roadblock – do you take a different path?

Are you thinking of making a detour? Or have you come to a junction and need to decide – stay on your path or make a turn? Regardless, most of the suggestions in the section above still apply. If you are thinking of a career change, it's best to first evaluate the skills and knowledge required in the new role or industry you seek, then select the best learning options for you.

Here are a few more enabling skills that may help you on your new journey. Understand yourself better through emotional intelligence or ask yourself what you really want to be, learn how to communicate when you're under pressure, enhance your ability to speak publicly and write with impact, and be the best negotiator you can.

» *Are you looking for a path to controllership?*
Explore CPABC's Controller's Operational Skills and Controller's Management programs.

Is it time to stop and take a breath?

Remember that personal development and wellness are also part of professional development – you cannot succeed at work if you feel overwhelmed. If you feel engulfed by commitments, it could be time to evaluate what you need to do for yourself. Learn a new mind-set that will optimize your productivity, evaluate new ways to respond to stressful situations, or boost your emotional intelligence to manage stress. For a lighter take, learn how to save time by tripling your reading speed.

On cruise control

Are you in a period of stability? You're comfortable where you are, but remember that as a professional accountant, you should still keep current on relevant issues that affect your work or profession.

If you work in accounting and auditing or taxation fields, consider taking update-style courses that will provide you with all the latest changes to standards, acts, and legislative updates. Or take a technology update to explore trends that may impact you. Our PD Nexus Days provide great opportunities to get bite-sized updates or refreshers on topical subjects.

Continue to identify gaps in your skills repertoire – and start planning for that next big step. If you have not already included leadership on this journey, consider that now. Stability should not equal stagnation – so now might be a good time to look into advanced level courses.

Moving ahead and beyond

» *Are you looking for a path to a CFO role?*
Explore CPABC's CFO's Operational Skills and CFO's Leadership programs.

Are you confident that you possess higher-level leadership and strategic management skills that will propel you all the way to the front?

Our Strategic Management and Advanced Strategic Management programs focus on the critical components of leadership and strategy, while some of our Executive Programs such as The CFO as Navigator, The CEO Program, Leading with Emotional Intelligence, and Smart Leaders will provide you with the leading-edge knowledge and skills you need.

Wherever you are on this lifelong learning journey, we hope you find valuable and engaging opportunities to improve your expertise.

Meet some of *your* great instructors!

REBECCA LOO, JD is an associate at Thorsteinssons LLP in Toronto. Rebecca's practice focuses on Canadian commodity tax matters.

She has written on GST/HST matters in publications including Canadian Tax Highlights, Canadian Tax Focus, and the CBA's Commodity Tax, Customs and Trade Section Newsletter.

NOAH SARNA, B.C.L., LL.B is a partner at Thorsteinssons LLP in Toronto. His practice focuses on all aspects of commodity tax. Noah assists his clients with tax planning, audit management, and tax litigation.

He is a frequent lecturer and author for various tax and legal conferences and publications.

Rebecca and Noah are co-authors of CPABC's GST/HST - NFPOs, and GST/HST - Real Property.

See more courses on Commodity Tax.

DAVID TRAHAIR, CPA, CA is a personal finance writer, trainer, and e-learning content developer. He is also a national best-selling author.

He currently operates his own personal finance training and e-learning development firm and offers on-demand and live webinars on personal finance to organizations including CPA provincial bodies across Canada.

Hear from David directly at his upcoming seminars: A Six Point Plan for Financial Freedom; Smoke & Mirrors: Financial Myths that will Ruin Retirement Dreams; and The Simplest Personal Finance Strategy Ever. Watch David discuss crushing debt in this CTV Global interview.

LAURA VILLACRUISIS, has over 25 years of experience working with organizations to support individual and organizational performance. She has partnered with leaders at all levels to design and facilitate processes in the areas of organization development, leadership development, change and transition, executive coaching, succession planning, and much more.

Listen to our podcast episode with Laura on high performance teams.

MARK OSTRY, CPA, CGA has worked in public practice for over 37 years and in 2002 he established his current practice in West Kelowna. He has experience at all levels of public practice, largely serving SMEs, and has expanded his operations to include a tax consulting service. Mark has created and presented many PD courses on practice management, ethics, and taxation.

Mark will be instructing a number of Tax courses this fall.

Meet some of *your* great instructors! (continued)

SANDY STEDMAN, FCPA, FCA is a partner with Schibli Stedman King LLP CPAs in Victoria. He has been a course author and instructor for the CPABC and other provincial professional accounting bodies since 2002. His practice includes tax and accounting advice for owner-managed business, professionals, high net worth individuals, and groups of privately held companies.

Sandy will be instructing a number of Corporate Tax courses this fall.

VICKIE WHITEHEAD, CPA, CGA, CAFM is the director of Indigenous Services at Crowe MacKay LLP. With 22 years of industry and Government of Canada experience, Vickie works with her Indigenous clients to help them achieve success in their sovereignty goals in the areas of Indigenous trust creation and management, board governance, and financial management.

Get insight from Vickie on developing Indigenous business relationships. This archived webinar panel was recorded at PD Nexus: Business & Leadership Insights on July 7, 2022.

GARTH SHERIFF, CPA, CA, CIA is the founder of Sheriff Consulting, specializing in delivering professional and leadership skills webinars and online courses. Sheriff Consulting's mission is to create a learning environment that is both engaging and impactful to your professional development. Garth has also worked as a professional actor and is a member of the Alliance of Canadian Cinema, Television and Radio Artists.

Garth will be facilitating the new certificate programs: Virtual Presentation Design and Delivery, and CPA Firm Manager Leadership Skills.

ROBIN ROSEBRUGH, B.Sc., CSBA, LEED GA, is a workplace consultant at Steelcase. She has a strong passion for continually developing her education, specifically focusing on the influence that our designed environment has on our behaviors and wellbeing.

Hear directly from Robin at the upcoming PD Nexus Day: Business & Innovation Insights.

Seminar **Formats**

In-person: Seminars of varying lengths delivered through the traditional in-classroom format offered by CPABC.

Live Online Virtual: Seminars that are offered live online via a virtual delivery platform such as Zoom.

On-demand: Sessions that are pre-recorded that allow individuals to attend a session at a time that works for them. In general, on-demand products do not have the ability to allow for Q&A with the subject matter expert.

CPABC Nexus Days

Nexus Days: One- to two-day conference-styled seminars. Examples of conference themes include: Work-Life Balance; Information Technology; Estate Planning; Business & Leadership, Business & Innovation; and Public Practice. These conferences usually include two plenary sessions and two to three concurrent break-out sessions.

CPABC Executive Programs

Executive Programs: In-depth (and often in-residence) or virtual executive programs geared towards providing deeper, concentrated learning in areas that fall under the responsibility of individuals holding senior accounting, finance and senior management roles.

Seminar **Levels**

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

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

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

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

ACCOUNTING & ASSURANCE

AUDIT & ASSURANCE

Assurance – Compliance with Agreements, Statutes and Regulations

Available Online On-demand Only | 3.5 hours | On-demand

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. Common reports include reports on compliance. Participants will gain a comprehensive overview of compliance standards CSAE 3530 and 3531 including performance and reporting requirements with illustrative examples.

NEW **Audit Engagements – Application of CAS 315 Revised Standard**

Two segments Dec-01 & Dec-02	9am-12:30pm	Live Webinar
Dec-07 & Dec-08	9am-12:30pm, 1pm-4:30pm	Live Webinar
Jan-11	9am-5pm	
Available Online On-demand		

This course reviews the revisions to CAS 315, Identifying and Assessing the Risks of Material Misstatement. The revisions require a more robust risk identification and assessment process to promote improved responses to identified risks. This course provides participants with guidance on the practical application of some of the key revisions in the standard.

Audit Engagements – Application of the Standards Using PEG

Dec-02	9am-5pm	Live Webinar
Jan-23	9am-5pm	Live Webinar
Available Online On-demand		

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), the course addresses the key areas of planning and performing audit engagements to meet the requirements of the Canadian Audit Standards.

Audit Engagements – Audit of a Simple Entity It can be challenging to understand how to apply certain Canadian Auditing Standards (CAS) to a simple entity in an efficient and effective manner. This seminar will help auditors to better understand and apply CAS requirements in this context. Key concepts of CAS and their application will be reviewed, taking into consideration unique characteristics of a simple entity.	Nov-25 Feb-10 *Available Online On-demand*	9am-5pm 9am-5pm	Live Webinar Live Webinar
Audit Engagements – Auditing Accounting Estimates (CAS 540) Revised Standard This course will provide an overview of Revised CAS 540 Auditing Accounting Estimates and Related Disclosures. Required risk assessment procedures, guidance on the three possible testing approaches in performing further audit procedures on accounting estimates, assessing inherent and control risk, performing stand-back procedures, incorporating professional skepticism, and meeting documentation will all be addressed. Participants will be able to identify the auditor's responsibilities and apply the standards when designing and performing procedures for audit engagements.	Dec-06 *Available Online On-demand*	1pm-4:30pm	Live Webinar
Audit Engagements – Overview of CAS 315 Revised Standard This seminar will review key changes and introduce the extensive application material in the revised CAS 315, Identifying and Assessing the Risks of Material Misstatement standard which is effective for audits of financial statements for periods beginning on or after December 15, 2021. Participants will build on their experience of planning an audit and be able to identify and develop an approach for the implementation of CAS 15 in their practice.	Nov-02 *Available Online On-demand*	9am-12:30pm	Live Webinar

Audit Engagements – Review of the Standards This seminar provides a foundation in the practical application of the Canadian Auditing Standards (CAS) to audit engagements. Using a case study approach, the course reviews key CAS 540 – Accounting Estimates and Related Disclosures and examines areas identified as common pitfalls by CPA national practice inspection findings.	Two segments Nov-28 & Nov-29 *Available Online On-demand*	8:30am-4:30pm	Live Webinar
Audit Engagements – Risk Related to Fraud (CAS 240) The requirements of CAS 240 are designed to assist the auditor in identifying and assessing the risk of material misstatement due to fraud and in designing procedures to detect and respond to such misstatements. Through the use of discussion, case studies, and examples, participants will be able to identify the auditor's responsibilities relate to fraud and apply the standards when designing and performing procedures for audit engagements.	Nov-03 *Available Online On-demand*	9am-12:30pm	Live Webinar
Audit Engagements – Update 2022 This seminar reviews recent revisions to the CPA Canada Handbook – Assurance and other practice matters that have occurred over the last year. In addition to comparing new and revised assurance and other related service standards, this seminar provides an overview of projects in progress and other developments of interest to practitioners, including national issues that have been identified by practice advisory and/or practice inspection.	Nov-01	8:30am-12:30pm	Live Webinar
	Nov-04	9am-12:30pm	**In-person, Vancouver**
	Nov-14	1pm-4:30pm	Live Webinar
	Dec-19	9am-12:30pm	Live Webinar
	Feb-13	8:30am-12:30pm	Live Webinar
	Available Online On-demand		

Compilation Engagements – Application of CSRS 4200 New Standard 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 in different scenarios and comparison of the previous standard to other non-assurance standards.	Oct-26 Nov-02 Nov-15 Nov-25 Dec-06 Jan-26 *Available Online On-demand*	9am-12:30pm 9am-12:30pm 9am-12:30pm 9am-12:30pm 9am-12:30pm 9am-12:30pm	**In-person, Surrey** Live Webinar **In-person, Vancouver** **In-person, Richmond** Live Webinar Live Webinar
Compilation Engagements – Overview of CSRS 4200 New Standard 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.	*Available Online On-demand Only*	4 hours	On-demand
Other Engagements – Agreed-Upon Procedures (CSRS 4400) New Standard This course provides participants with an overview of the requirements of the new Canadian Standard for Related Services (CSRS) 4400 and its impact on the planning, implementation, and documentation of an Agreed-Upon Procedures engagement. Participants will be able to identify what is covered in the standard such as the use of professional judgment in an agreed-upon procedures engagement, using the work of a practitioner's expert and undertaking an agreed-upon procedures engagement together with another engagement.	*Available Online On-demand Only*	2 hours	On-demand

NEW **Other Engagements – Non-Assurance** An overview of the CPA Canada Other Canadian Standards for Related Services Engagements (non-assurance standards). This course will provide an understanding of what types of engagements are covered by each standard, an outline of the work to be done under each from client acceptance to reporting, and compare between the standards to clearly show when each would or would not be applicable.	*Available Online On-demand Only*	2 hours	On-demand
Quality Control – Review of CSQC1 (Current Standard) This seminar is designed to assist sole practitioners and small firms in understanding the requirements of the quality control standards as set out in Canadian Standards of Quality Control (CSQC1) and how the requirements may be applied in a small firm environment. The seminar is structured based on the CPA Canada Quality Assurance Manual subscription, however the topics and ideas may be integrated into any customized firm template.	*Available Online On-demand Only*	3.5 hours	On-demand
NEW **Quality Management - Application of CSQM 1 and 2 for Providers of Assurance Services New Standards** The Canadian Standards for Quality Control (CSQC1) have been replaced by the Canadian Standard for Quality Management (CSQM1 and CSQM2) and related amendments to relevant assurance standards. This session will provide participants with a brief overview of the new requirements along with examples of common quality control objectives, risks and responses for small to mid-size firms, and opportunities to tailor these to their firm's specific circumstances.	Dec-15 Jan-25 *Available Online On-demand*	9am-12:30pm 9am-12:30pm	Live Webinar Live Webinar

Quality Management - Impacts of CSQM 1 and 2 for Providers of Assurance Services New Standards This seminar will help assurance practitioners understand the International Standards on Quality Management (ISQM) 1 and 2, which are proposed to replace CSQC 1. ISQM 1 provides a new approach to quality management at the firm level, including guidance on a risk assessment process and ISQM 2 provides guidance on engagement quality reviews. Participants understanding of the new approach will allow them to identify and address risks to their practice and get a head start on compliance.	*Available Online On-demand Only*	1 hour	On-demand
Quality Management - Impacts of CSQM 1 and 2 for Providers of Compilation and Other Non-Assurance Services New Standards This seminar will provide non-assurance practitioners who perform compilations with an understanding of the International Standards on Quality Management (ISQM) 1 and 2 which are proposed to replace CSQC 1. The standard sets out what is needed in a firm's quality control systems to achieve quality objectives and manage risk and provides guidance on engagement quality reviews.	*Available Online On-demand Only*	1 hour	On-demand
Quality Management – Overview of CSQM1 and 2 for Providers of Assurance Services, New Standards This course reviews the requirements of the new Canadian Standard for Quality Management (CSQM1 and CSQM2) and related amendments to Canadian Auditing Standards (CAS 220) and its impact on quality control processes for assurance practitioners. The course provides a map of the decisions that will need to be made and the changes, if any, required to ensure current quality control processes and procedures are compliant with the new standards.	Nov-23 *Available Online On-demand*	9am-12:30pm	Live Webinar

ACCOUNTING & ASSURANCE
Audit & Assurance
Financial Reporting
Management Accounting
ETHICS
FINANCE & ECONOMICS
Business Valuations
Corporate Finance
Financial Modelling
PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT
Communication & Negotiation
Creative Thinking & Decision-Making
Self-Management & Wellness
Teamwork & Leadership
Resilient & Advanced Resilient Leadership Certificate Program
PUBLIC PRACTICE MANAGEMENT
STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE
Risk Management & Fraud
Strategy, Governance & Human Resource
Strategic & Advanced Strategic Management Certificate Programs
TAXATION
Commodity Tax
Corporate & Personal Tax
Not-For-Profit Organizations
Trusts & Estates
TECHNOLOGY & INNOVATION
Business Transformation & Emerging Issues
Software & Tools
WEALTH MANAGEMENT
PD NEXUS DAYS

NEW **Quality Management – Overview of CSQM1 and 2 for Providers of Compilation and Other Non-Assurance Services, New Standards** This course provides participants with an overview of the requirements of the newly issued Canadian Standard for Quality Management (CSQM1 and CSQM2) and its impact on quality control processes for non-assurance practitioners. The course provides a map of the decisions that will need to be made and the changes, if any, required to ensure current quality control processes and procedures are compliant with the new standards.	Dec-13 Mar-10 *Available Online On-demand*	9am-12:30pm 9am-12:30pm	Live Webinar Live Webinar
Review Engagements – Application of the Standard (CSRE 2400) 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. Participants will learn to optimize the planning of the engagement, develop strategies for key steps, and identify issues related to the implementation of the requirements.	Nov-09 Feb-07 *Available Online On-demand*	9am-5pm 9am-5pm	Live Webinar Live Webinar
Review Engagements - Overview of the Standard (CSRE 2400) This seminar provides an in-depth review of the application of the Canadian Standard on Review Engagements (CSRE) 2400, Engagements to Review Historical Financial Statements, which is effective for periods ending on or after December 14, 2017. Each stage of the review engagement will be considered, from planning to issuance of the practitioner's report, including a detailed examination of changes relative to the former standards. Practical tools will be used to illustrate examples of documentation.	*Available Online On-demand Only*	1.5 hours	On-demand

Seminar Schedule
PD Passports
Nexus Days
Executive Programs
Certificate Programs

Review Engagements - Specific Topics This course builds upon fundamental knowledge of CSRE 2400: Review Engagements and addresses areas that commonly prove more challenging for practitioners. Participants will gain a deeper understanding of how to quickly identify incomplete review engagement documentation and apply the necessary changes to resolve outstanding issues.	Nov-07 *Available Online On-demand*	9am-5pm	Live Webinar

» **DIDN'T FIND A SEMINAR?** Other Audit & Assurance titles may be available on-demand.

FINANCIAL REPORTING

ASNFPO – 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 the options available when setting accounting policies and the impacts on disclosure.	Oct-24 *Available Online On-demand*	8:30am-4:30pm	Live Webinar
ASNFPO – 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 options are available when selecting policies and their impacts on disclosure, and how to determine the appropriate accounting treatment given different facts and scenarios.	Dec-05 *Available Online On-demand*	8:30am-4:30pm	Live Webinar
ASNFPO – Update 2022 This seminar will provide an information update on recent revisions to the CPA Canada Handbook – Part III, Accounting Standards for Not-for-Profit Organizations (ASNFPO). In addition, revisions will be discussed to Part II, Accounting Standards for Private Enterprises (ASPE) where they are applicable to NFPOs. Participants will be able to utilize this information on proposed changes to the standards to provide guidance to NFPOs and board members.	Nov-14 *Available Online On-demand*	8:30am-10:30am	Live Webinar

NEW **ASPE – Agriculture (3041) New Standard** This seminar offers a detailed review and analysis of the new Canadian ASPE accounting standard for agriculture (3410) as it applies to the unique characteristics of agricultural inventories and productive biological assets. The seminar will provide practical examples and guidance regarding the recognition and measurement of these agricultural assets.	Nov-10 *Available Online On-demand*	9am-12:30pm	Live Webinar
ASPE – Construction Industry This seminar is designed to enable the practical application of the Part II – Accounting Standards for Private Enterprises (ASPE) that are applicable to the construction industry. Emphasis will be placed on the application of revenue recognition and other accounting policies using specific scenarios and practical illustrative examples. The seminar covers the disclosure requirements and other issues specific to construction contracts.	Oct-28 Mar-03 *Available Online On-demand*	9am-12:30pm 9am-12:30pm	Live Webinar 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). Each disclosure and presentation requirement of ASPE will be reviewed and examples will be provided.	Nov-28 Mar-06 *Available Online On-demand*	9am-5pm 9am-5pm	Live Webinar 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.	Two segments Oct-25 & Oct-26 Nov-23 Two segments Feb-21 & Feb-22 *Available Online On-demand*	8:30am-12:30pm 8:30am-5pm 8:30am-12:30pm	Live Webinar Live Webinar Live Webinar

ACCOUNTING & ASSURANCE
Audit & Assurance
Financial Reporting
Management Accounting
ETHICS
FINANCE & ECONOMICS
Business Valuations
Corporate Finance
Financial Modelling
PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT
Communication & Negotiation
Creative Thinking & Decision-Making
Self-Management & Wellness
Teamwork & Leadership
Resilient & Advanced Resilient Leadership Certificate Program
PUBLIC PRACTICE MANAGEMENT
STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE
Risk Management & Fraud
Strategy, Governance & Human Resource
Strategic & Advanced Strategic Management Certificate Programs
TAXATION
Commodity Tax
Corporate & Personal Tax
Not-For-Profit Organizations
Trusts & Estates
TECHNOLOGY & INNOVATION
Business Transformation & Emerging Issues
Software & Tools
WEALTH MANAGEMENT
PD NEXUS DAYS

ASPE – Revenue Recognition (3400)

This course addresses challenges faced by preparers of ASPE financial statements and practitioners with respect to the recognition, measurement, presentation, and disclosure of revenue transactions as a result of recent revisions to ASPE 3400. This course offers a comprehensive review of the principles of revenue recognition under ASPE with illustrations and examples on common revenue arrangements including sale of goods vs. services in a variety of industries.

Two segments Nov-28 & Nov-29	9am-12:30pm	Live Webinar

Available Online On-demand

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 segments Dec-05 & Dec-06	8:30am-5pm	Live Webinar
Mar-07 & Mar-08	8:30am-5pm	Live Webinar

Available Online On-demand

ASPE – Strategic Investment

This course examines choices regarding accounting for strategic investments, including subsidiaries, significantly influenced investees or investments in joint arrangements relating to ASPE 1591, 3051 and 3856. The examination will include the impact on recognition, measurement, presentation and disclosure of the choices. Participants learn to evaluate the nature of strategic investments and apply the correct accounting method, including when to choose to account for controlled subsidiaries or significantly influenced investees at cost.

Available Online On-demand Only	7 hours	On-demand

Seminar Schedule
PD Passports
Nexus Days
Executive Programs
Certificate Programs

ACCOUNTING & ASSURANCE
Audit & Assurance
Financial Reporting
Management Accounting
ETHICS
FINANCE & ECONOMICS
Business Valuations
Corporate Finance
Financial Modelling
PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT
Communication & Negotiation
Creative Thinking & Decision-Making
Self-Management & Wellness
Teamwork & Leadership
Resilient & Advanced Resilient Leadership Certificate Program
PUBLIC PRACTICE MANAGEMENT
STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE
Risk Management & Fraud
Strategy, Governance & Human Resource
Strategic & Advanced Strategic Management Certificate Programs
TAXATION
Commodity Tax
Corporate & Personal Tax
Not-For-Profit Organizations
Trusts & Estates
TECHNOLOGY & INNOVATION
Business Transformation & Emerging Issues
Software & Tools
WEALTH MANAGEMENT
PD NEXUS DAYS

ASPE – Statement of Cash Flows This seminar provides participants with an overview of the preparation of the statement of cash flow, including discussion of the standard and exercises involving the preparation of a statement of cash flow under the direct and indirect method. The seminar covers basic cash flow statements and additional complexities, including non-cash transactions, foreign exchange, definition of cash and cash equivalents, and determination of adjustments to operating activities.	*Available Online On-demand Only*	2 hours	On-demand
ASPE – Stock-Based Compensation (3870) This seminar focuses on the areas of financial reporting of stock-based compensation that are widely experienced in private enterprises. The seminar starts with a discussion on how to determine and account for stock-based compensation based on illustrative examples and a comprehensive exercise. Participants will better understand the requirements of the ASPE standards through discussion, exercises that introduce complexities, and a comprehensive exercise to illustrate the concepts discussed.	*Available Online On-demand Only*	2 hours	On-demand
ASPE – Update 2022 This seminar reviews recent revisions to Part II – Accounting Standards for Private Enterprises (ASPE) for participants who want to keep up with accounting standard changes and projects. In addition to an overview of the changes, specific examples detailing implementation will be provided and awareness of potential future changes in the standards will be included.	Oct-28	8:30am-12:30pm	Live Webinar
	Nov-08	9am-12:30pm	**In-person, Vancouver**
	Nov-15	8:30am-12:30pm	Live Webinar
	Dec-16	8:30am-12:30pm	Live Webinar
	Feb-06	9am-12:30pm	Live Webinar
	Available Online On-demand		

IFRS – Disclosure and Presentation This seminar provides a review of Part I – International Financial Reporting Standards (IFRS) pertaining to the disclosure and financial statement presentation standards. It will highlight the work of standards setters to streamline presentation and disclosure and the use of non-GAAP disclosures. The seminar covers areas of disclosure that users and security commissions have found deficient and provides insight to assist participants in writing clear, concise disclosure notes and preparing financial statements that are consistent with IFRS requirements.	TwoSegments Oct-26 & Oct-27 *Available Online On-demand*	9am-12:30pm	Live Webinar
IFRS – Essentials This seminar provides participants who want to know about IFRS, but who do not have to implement the standards and understand all of the technical details, with an understanding of the essentials of Part I - International Financial Reporting Standards. It delivers an examination on the types of entities using IFRS, impacts on development of ASPE, key concepts, conceptual frameworks, descriptions of IFRS terminology, and basics of IFRS financial statements.	*Available Online On-demand Only*	3.5 hours	On-demand
IFRS – 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.	Two segments Dec-12 & Dec-13 *Available Online On-demand*	8:30am-12:30pm	Live Webinar
IFRS – Mining Industry This course will provide an overview of the common accounting issues that arise in the mining industry under IFRS standards. Following the life cycle of a mineral project from exploration to mine closure, the course will look at the accounting issues and judgments that apply in each phase of activity. The course provides examples allowing participants to identify issues that are relevant in each stage.	*Available Online On-demand Only*	7 hours	On-demand

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 segments Nov-21, Nov-22, Nov-23 & Nov-24 *Available Online On-demand*	9am-12:30pm	Live Webinar
IFRS – Update 2022 This seminar provides participants with a review of new and revised International Financial Reporting Standards (IFRS) between July 2021 and June 2022 and an up-to-date snapshot of other projects being considered by the IASB. This course updates the participants' knowledge of changes to IFRS and non-authoritative guidance that has been issued by the IFRS Interpretations Committee and the IFRS Discussion Group during the year.	Oct-19 Nov-03 Feb-06 *Available Online On-demand*	8:30am-12:30pm 8:30am-12:30pm 8:30am-12:30pm	Live Webinar **In-person, Vancouver** Live Webinar
IFRS 15 – Revenue Recognition Accurate revenue recognition reporting is necessary for internal and external reporting for all revenue-producing companies to maintain investor and creditor confidence. The objective of this seminar is to provide participants with a practical understanding of the five-step revenue recognition framework under Part I – International Financial Reporting Standards (IFRS) 15, Revenue from Contracts with Customers, and how to apply it.	*Available Online On-demand Only*	7 hours	On-demand
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 segments Nov-30 & Dec-01 *Available Online On-demand*	9am-12:30pm	Live Webinar

ACCOUNTING & ASSURANCE
- Audit & Assurance
- **Financial Reporting**
- Management Accounting

ETHICS

FINANCE & ECONOMICS
- Business Valuations
- Corporate Finance
- Financial Modelling

PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT
- Communication & Negotiation
- Creative Thinking & Decision-Making
- Self-Management & Wellness
- Teamwork & Leadership
- Resilient & Advanced Resilient Leadership Certificate Program

PUBLIC PRACTICE MANAGEMENT

STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE
- Risk Management & Fraud
- Strategy, Governance & Human Resource
- Strategic & Advanced Strategic Management Certificate Programs

TAXATION
- Commodity Tax
- Corporate & Personal Tax
- Not-For-Profit Organizations
- Trusts & Estates

TECHNOLOGY & INNOVATION
- Business Transformation & Emerging Issues
- Software & Tools

WEALTH MANAGEMENT

PD NEXUS DAYS

PSAS – Review of the Standards This workshop provides participants with an introduction to PSAS focusing on general concepts, the structure of the PSAS Handbook, and differences between PSAS and those of ASPE or IFRS. The workshop uses collaborative learning, industry examples, small case studies, and comparison of PSAS concepts with those in ASPE or IFRS to link relevant concepts to enhance participants' knowledge.	Nov-04 *Available Online On-demand*	9am-5pm	Live Webinar
PSAS – Specific Topics This workshop examines the application of complex areas in the PSAS, starting with an overview of the more recent standards and changes to come, including Asset Retirement Obligations. Using mini case studies, shorter collaborative discussion exercises, and real-world examples, the workshop explores common areas of complexity that appear frequently in practice and raise discussions between finance professionals and auditors.	Dec-09 *Available Online On-demand*	9am-5pm	Live Webinar
PSAS – Update 2022 This seminar provides a review of sections in the PSA Handbook that have recently undergone addition, including pending sections, along with ongoing key projects and activities of the PSA Board. Background information and examples will be provided to allow participants to better position themselves to plan for the changes and to advise others.	Nov-10 *Available Online On-demand*	9am-12:30pm	Live Webinar

» **DIDN'T FIND A SEMINAR?** Other Financial Reporting titles may be available on-demand.

Seminar Schedule
PD Passports
Nexus Days
Executive Programs
Certificate Programs

MANAGEMENT ACCOUNTING

Accelerate & Optimize Financial Close & Spreadsheet Controls Gain a practical understanding of best practices in financial close processes and learn how to accelerate the financial close process and controls. You will focus on spreadsheet controls, which make the whole process of using spreadsheets more effective and efficient. You will also learn how to redesign and enhance spreadsheets to reduce the likelihood of error and facilitate the use of spreadsheets as analytical tools.	Two segments Nov-14 & Nov-15	9am-12:30pm	Live Webinar
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.	Oct-28	9am-5pm	Live Webinar
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.	Oct-19 Dec-19 Feb-10	8:30am-4:30pm 8:30am-4:30pm 8:30am-4:30pm	**In-person, Vancouver** Live Webinar Live Webinar
Building Enterprise Performance Dashboards The multi-dimensional view of enterprises with both leading and lagging key performance indices (KPIs) has led many leading organizations to design holistic performance measurement and management frameworks to run their business. These frameworks are often referred to as "balanced scorecards." Through real examples and hands-on work, you will understand how these scorecards can improve performance and help your company exceed expectations.	Oct-27	9am-5pm	Live Webinar

Controlling – Operational Management

Dates for live sessions to be announced

In order to add value to their organizations, controllers serve distinct roles and this seminar focuses on two: steward and operator. In the operator role, the controller plays a part in human resource management as well as performing their steward role through financial performance and performance measurement, information/risk management, and relationship management skills. Participants will gain insights, skills, practical tips, and a broader view of the controller's role to add value to their organization.

Available Online
On-demand

Controllership – Strategic Leadership

Dates for live sessions to be announced

This seminar clarifies the controller's responsibilities and provides an in-depth examination of the catalyst and strategist roles. It also provides strategies for working with people of all ages and addresses the importance of emotional intelligence. Participants will be able to identify ways they can add value as strategic leaders in their organization, and will receive practical tips on how to enhance their leadership skills in their role.

Available Online
On-demand

Costing and Profitability

Nov-25 | 9am-5pm | Live Webinar

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.

Seminar Schedule
PD Passports
Nexus Days
Executive Programs
Certificate Programs

ACCOUNTING & ASSURANCE
Audit & Assurance
Financial Reporting
Management Accounting
ETHICS
FINANCE & ECONOMICS
Business Valuations
Corporate Finance
Financial Modelling
PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT
Communication & Negotiation
Creative Thinking & Decision-Making
Self-Management & Wellness
Teamwork & Leadership
Resilient & Advanced Resilient Leadership Certificate Program
PUBLIC PRACTICE MANAGEMENT
STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE
Risk Management & Fraud
Strategy, Governance & Human Resource
Strategic & Advanced Strategic Management Certificate Programs
TAXATION
Commodity Tax
Corporate & Personal Tax
Not-For-Profit Organizations
Trusts & Estates
TECHNOLOGY & INNOVATION
Business Transformation & Emerging Issues
Software & Tools
WEALTH MANAGEMENT
PD NEXUS DAYS

Effective Financial Analysis for Business Decisions – Small Businesses Business owners and their advisors need to understand the financial impact of their decisions in order to make effective business decisions and perform effective financial analysis. Learn how to assess a company's business, operational, and financial performance including implications of working capital management, impact of growth on financial needs, key aspects of cash flow and budgeting, financial performance indicators, and techniques for analyzing financial data and statements.	Oct-28	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.	Nov-16	9am-5pm	Live Webinar
NEW **How to Establish and Optimize Fraud Risk Management Programs** Management needs to establish systems to prevent fraud and/or detect it in a timely manner, and create a strong fraud deterrence environment. Gain practical understanding of the Fraud Risk Management (FRM) Guide introduced by COSO, focusing on the transition of traditional FRM methodologies to a principle-based fraud risk management framework. Participants will also learn the fundamental difference between internal control weaknesses resulting in errors and weaknesses resulting in fraud.	Two segments Dec-05 & Dec-06	9am-12:30pm	Live Webinar

Seminar Schedule
PD Passports
Nexus Days
Executive Programs
Certificate Programs

Implementation of Internal Controls in the Small to Mid-size Enterprise (SME) Context Leadership and expectations of the finance function are evolving rapidly, resulting in diverse definitions of good governance, management responsibility, and appropriate internal controls. This hands-on seminar gives new and experienced financial leaders an opportunity to explore and discuss implementation of internal controls in the SME context, using the COSO Enterprise Risk Management Methodology.	Oct-25 *Available Online On-demand*	8:30am-4:30pm	Live Webinar
Internal Controls Refresher for Financial Managers When was the last time you looked at your organization's internal controls? This fast-paced seminar provides financial managers with an interesting refresher on controls through videos, case studies, and discussion. Content includes what business life would be like without controls, the COSO Internal Control Framework, and case studies of controls gone wrong. Leave with a deeper understanding of internal controls and innovative approaches to internal controls.	Nov-17	9am-5pm	**In-person, Vancouver**
Internal Controls – Creating Value through Business Process Improvements and Effective Controls This is a hands-on seminar intended to give new and experienced financial leaders an opportunity to update their knowledge of internal controls using the COSO Framework. The seminar also includes exploration of LEAN management concepts that can be applied to the development of internal controls, the COBIT framework for IT controls, and a brief look at how to detect and prevent fraud.	Nov-03 *Available Online On-demand*	8:30am-4:30pm	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.	Nov-29	9am-5pm	Live Webinar

Seminar Schedule
PD Passports
Nexus Days
Executive Programs
Certificate Programs

ACCOUNTING & ASSURANCE
- Audit & Assurance
- Financial Reporting
- **Management Accounting**

ETHICS

FINANCE & ECONOMICS
- Business Valuations
- Corporate Finance
- Financial Modelling

PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT
- Communication & Negotiation
- Creative Thinking & Decision-Making
- Self-Management & Wellness
- Teamwork & Leadership
- Resilient & Advanced Resilient Leadership Certificate Program

PUBLIC PRACTICE MANAGEMENT

STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE
- Risk Management & Fraud
- Strategy, Governance & Human Resource
- Strategic & Advanced Strategic Management Certificate Programs

TAXATION
- Commodity Tax
- Corporate & Personal Tax
- Not-For-Profit Organizations
- Trusts & Estates

TECHNOLOGY & INNOVATION
- Business Transformation & Emerging Issues
- Software & Tools

WEALTH MANAGEMENT

PD NEXUS DAYS

Management Accounting – Fundamentals You might not have used management accounting principles in some time, yet 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.	*Available Online On-demand*	7 hours	On-demand
New Insights on Profits and Risk The world is changing quickly. You need to keep ahead of the curve. This seminar looks at contemporary issues of vital interest to financial managers. What should you do to prepare? Explore the disruptive ideas that will affect the business world over the next decade. You will leave with concrete ideas about what you can do and what your organization should do differently.	Nov-18	9am-5pm	**In-person, Vancouver**
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.	Feb-10	9am-5pm	Live Webinar
Practical Tips for Controllers and 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-25 Feb-28	9am-5pm 9am-5pm	Live Webinar Live Webinar
Practical Tips for Government Accountants Discover many veteran tips, including numerous unconventional ones, which either apply directly, or will inspire innovative thinking through private sector experience and ideas. Tips will be illustrated through concrete examples derived from practical experience.	Dec-15	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.	Dec-14	9am-5pm	Live Webinar
Taking Financial Statement and 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.	Mar-10	9am-5pm	Live Webinar

» **DIDN'T FIND A SEMINAR?** Other Management Accounting titles may be available on-demand.

Seminar Schedule
PD Passports
Nexus Days
Executive Programs
Certificate Programs

ETHICS

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-13	8:30am-12:30pm	Live Webinar
	Sep-20	8:30am-12:30pm	Live Webinar
	Oct-06	8:30am-12:30pm	Live Webinar
	Oct-14	8:30am-12:30pm	**In-person, Vancouver**
	Oct-18	8:30am-12:30pm	**In-person, Kelowna**
	Oct-22	8:30am-12:30pm	Live Webinar
	Nov-14	8:30am-12:30pm	Live Webinar
	Dec-05	8:30am-12:30pm	**In-person, Vancouver**
	Dec-08	8:30am-12:30pm	Live Webinar
	Dec-09	8:30am-12:30pm	Live Webinar
	Dec-12	8:30am-12:30pm	Live Webinar
	Dec-13	8:30am-12:30pm	Live Webinar
	Dec-16	8:30am-12:30pm	Live Webinar
	Dec-17	8:30am-12:30pm	Live Webinar
	Dec-20	8:30am-12:30pm	Live Webinar
	Feb-13	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.	Nov-04	8:30am-12:30pm	**In-person, Vancouver**
	Nov-22	8:30am-12:30pm	Live Webinar
	Nov-29	8:30am-12:30pm	Live Webinar
	Dec-09	8:30am-12:30pm	**In-person, Victoria**
	Feb-07	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.	Sep-27	8:30am-12:30pm	**In-person, Vancouver**
	Oct-25	8am-12pm	Live Webinar
	Oct-25	1pm-5pm	Live Webinar
	Nov-03	8:30am-12:30pm	**In-person, Surrey**
	Nov-04	8am-12pm	Live Webinar
	Nov-04	1pm-5pm	Live Webinar
	Feb-22	8:30am-12:30pm	**In-person, Vancouver**
	Mar-21	8:30am-12:30pm	Live Webinar
Ethical Decision Making: Exploring the Hidden Influence of Unconscious Bias in the Conscious Mind How can we better understand the hidden biases that underlie our decisions, shape our perspectives, and influence our personal interactions? In this session we will consider the drivers of unconscious bias and the impact on organizational decision making. We will explore how best to identify and mitigate the risks of unconscious bias in the workplace, to build more innovative, inclusive, and ultimately successful organizations.	Oct-17	8:30am-12:30pm	Live Webinar
	Nov-09	8:30am-12:30pm	**In-person, Vancouver**
	Nov-29	8:30am-12:30pm	Live Webinar
	Dec-12	8:30am-12:30pm	Live Webinar
	Feb-08	8:30am-12:30pm	Live Webinar
	Mar-10	8:30am-12:30pm	**In-person, Vancouver**
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.	Oct-07	8:30am-12:30pm	Live Webinar
	Oct-24	8:30am-12:30pm	Live Webinar
	Two segments Nov-21 & Nov-22	4pm-6pm	Live Webinar
	Dec-10	8:30am-12:30pm	Live Webinar
	Dec-19	8:30am-12:30pm	Live Webinar
	Feb-14	8:30am-12:30pm	Live Webinar

» **READ** instructor Laura Friedrich's article on CPAs and AI.

NEW **Ethics – More than just the Code of Conduct** This course is a thought-provoking discussion of ethical issues, from the CPA Code of Professional Conduct and elsewhere, in accounting, tax, and business. It will remind you to pause and think beyond your initial reaction –there may be more to the situation. The presenter will share personal experiences with ethically challenging situations and their resolution.	Oct-25	9am-11:30am	Live Webinar
Ethics and Technology Uncover ethical considerations and outcomes related to technology. Explore “technoethics” and the implications it has for individuals and organizations, pertaining to issues such as copyrights, cybercrimes, and geo-tracking technologies.	Dec-16 Jan-26	8:30am-12:30pm 8:30am-12:30pm	Live Webinar Live Webinar
Ethics at Our Core Refresh your knowledge of the CPA Code of Professional Conduct and apply the Code to resolve several interactive case studies and realistic situations. This seminar helps participants to develop skills for dealing with ethical dilemmas and using appropriate decision making in their workplaces.	Oct-19 Oct-27 Dec-20 Mar-24	8:30am-12:30pm 8:30am-12:30pm 8:30am-12:30pm 8:30am-12:30pm	Live Webinar Live Webinar Live Webinar Live Webinar
Professional Ethics for Career and Life Success Receive guidance through several classic ethical frameworks, and practical tools to maintain high standards of ethics in your work and on your team. Learn how you can ensure you are working ethically even when you are charting new territory, especially amidst constant change.	Nov-09 Nov-19	8:30am-12:30pm 8:30am-12:30pm	Live Webinar 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-04 Nov-22 Nov-29 Feb-07	1pm-5pm 1pm-5pm 1pm-5pm 1pm-5pm	Live Webinar Live Webinar Live Webinar Live Webinar

ACCOUNTING & ASSURANCE
Audit & Assurance
Financial Reporting
Management Accounting
ETHICS
FINANCE & ECONOMICS
Business Valuations
Corporate Finance
Financial Modelling
PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT
Communication & Negotiation
Creative Thinking & Decision-Making
Self-Management & Wellness
Teamwork & Leadership
Resilient & Advanced Resilient Leadership Certificate Program
PUBLIC PRACTICE MANAGEMENT
STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE
Risk Management & Fraud
Strategy, Governance & Human Resource
Strategic & Advanced Strategic Management Certificate Programs
TAXATION
Commodity Tax
Corporate & Personal Tax
Not-For-Profit Organizations
Trusts & Estates
TECHNOLOGY & INNOVATION
Business Transformation & Emerging Issues
Software & Tools
WEALTH MANAGEMENT
PD NEXUS DAYS

Understanding and Embracing Ethics in the Workplace Learn effective techniques for ethical thinking and how to apply these tools to relevant business-based scenarios.	Nov-23	8:30am-12:30pm	**In-person, Vancouver**
	Nov-25	8:30am-12:30pm	Live Webinar
	Nov-30	8:30am-12:30pm	Live Webinar
	Dec-14	8:30am-12:30pm	Live Webinar
	Mar-22	8:30am-12:30pm	Live Webinar

» **DIDN'T FIND A SEMINAR?** Other Ethics titles may be available on-demand.

Seminar Schedule
PD Passports
Nexus Days
Executive Programs
Certificate Programs

FINANCE & ECONOMICS

BUSINESS VALUATIONS

Business Valuations – Advanced

Building on the concepts taught in Business Valuations – Fundamentals, this seminar gives participants detailed insight into some of the more complex issues associated with business valuations using a detailed case study. This seminar dissects the basic approaches, so that practitioners can recognize the limitations of various valuation approaches, and provides information that will allow professionals to conduct supplementary analysis for a more robust conclusion of value.

Dec-16	9am-5pm	Live Webinar
Feb-24	9am-5pm	Live Webinar
Available Online On-demand		

Business Valuations – Fundamentals

Accountants often need basic business valuation knowledge and skills to assist their clients or employers. This seminar provides participants with practical insight into business valuation. Participants will gain insight on how to apply various valuation tools and the valuation process under an asset approach, income approach, and market approach.

Oct-20	9am-5pm	Live Webinar
Nov-17	9am-5pm	**In-person, Vancouver**
Feb-22	9am-5pm	Live Webinar
Available Online On-demand		

Business Valuations – Purchase Price Allocation

This seminar presents practical strategies for approaching a purchase price allocation (PPA) for financial reporting purposes following a business acquisition or combination. The seminar provides a summary of valuation techniques used for specific, identifiable intangible assets and provides a step-by-step review of sample calculations for valuing different types of intangible assets resulting from a business purchase.

Dec-14	9am-5pm	Live Webinar
Available Online On-demand		

» **DIDN'T FIND A SEMINAR?** Other Business Valuation titles may be available on-demand.

CORPORATE FINANCE

Cash and Treasury Management This seminar reviews contemporary issues in cash and treasury management including improving cash forecasts, optimizing cash flows, financial risk management, and measuring value-at-risk. Explore state-of-the-art changes in the world of cash and treasury management, exchange ideas with peers, and leave with fresh insights to improve cash management.	Nov-16	9am-5pm	**In-person, Vancouver**
Corporate Treasury Management Treasury is a key finance function that ensures businesses have the money they need to manage their day-to-day business obligations, while also helping develop their long-term financial strategies and policies. Work through detailed calculations, case studies, and examples to gain an understanding of the treasury function and how to apply its fundamental principles within the finance department of your organizations.	*Available Online On-demand Only*	7 hours	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-17 *Available Online On-demand*	9am-5pm	Live Webinar

Financing Strategies Many businesses require some type of financing and 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. You will gain a deeper understanding of what capital providers are seeking and issues that can arise. You will also learn how companies should prepare themselves to execute a financing transaction in order to obtain financing and negotiate with capital providers.	Dec-15 *Available Online On-demand*	9am-5pm	Live Webinar
Treasury & Finance for Accountants Although accountants are not specifically trained in the inner workings of hedging and financial instruments, they are often called upon for advice in these areas, particularly to hedge various risks. This course reviews the business side of finance, hedging, and treasury transactions and provides accountants with a solid understanding of some of the key financial principles to obtain a better understanding of the business aspects.	Dec-16	9am-5pm	Live Webinar

» **DIDN'T FIND A SEMINAR?** Other Corporate Finance titles may be available on-demand.

FINANCIAL MODELLING

Building a Model (of a Company) This hands-on course focuses on the skills required to design and create an interactive financial model of a company that adheres to the highest industry standards. The course material includes model design, logic, construction, financial concepts, and accounting treatment. During the seminar, participants will build a model that includes a forecast of a company's income statement, cash flow statement, and balance sheet.	Oct-27 Feb-28	9am-5pm 9am-5pm	Live Webinar Live Webinar

» **DIDN'T FIND A SEMINAR?** Other Financial Modelling titles may be available on-demand.

PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT

COMMUNICATION & NEGOTIATION

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. The focus throughout is on fostering the behaviours that drive enterprise success, and on minimizing the incidence and impact of behaviours that create a risk of harm.	Dec-05	9am-12:30pm	**In-person, Vancouver**
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 segments Oct-18 & Oct-19	8:30am-12pm	Live Webinar
Communicating Effectively Under Pressure Explore situations where you may feel pressure, and learn practical strategies to manage these situations effectively.	Two segments Nov-08 & Nov-09	9am-12:30pm	Live Webinar
	Nov-24	9am-5pm	**In-person, Vancouver**
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 segments Nov-14 & Nov-15	9am-5pm	Live Webinar
	Feb-21 & Feb-22	9am-5pm	Live Webinar

Conflict: Changing Viewpoints and 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 segments Dec-06, Dec-07 & Dec-08	10am-12:30pm	Live Webinar
Giving and Receiving Feedback in the Workgroup This interactive workshop addresses one of the key reasons why people avoid giving or receiving feedback in the workgroup: they don’t know how. Learn a practical, effective framework for giving and receiving feedback in a workgroup context. Discover specific tools and techniques to positively influence the other person’s behaviour in the feedback conversation and to ultimately hold the other person accountable for any bad behaviour, if necessary.	Dec-14	9am-12:30pm	**In-person, Vancouver**
Level Up: Better Online Meetings Like it or not, virtual meetings are here to stay. Learn how to make the most of online meetings so you can better connect with participants in an engaging, efficient way.	Nov-24	9am-12:30pm	Live Webinar
Level Up: Public Speaking and Presentation Skills Whether you dread speaking in front of others or simply know you can do better, this course will provide you with tangible tips and tools you can use to take your public speaking to the next level. From preparation to execution, we will explore ways you can enhance all aspects of your public speaking and presentation skills.	Nov-23	9am-12:30pm	Live Webinar
Level Up: Writing for Clarity and Impact From Slack messages to client emails and reports, written communication is everywhere. Is your message landing? In this workshop, you’ll learn how to improve your writing by focusing on clarity and impact.	Nov-09	9am-12:30pm	Live Webinar

Negotiation Skills The ability to negotiate effectively both internally and externally differentiates how an individual contributes to the team. This workshop is based on the four-part model 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 (past, current, and future) that the participants face, with a heavy emphasis on practice and coaching by peers and the facilitator.	Nov-10	9am-5pm	**In-person, Vancouver**

» **READ** instructor Laura Villacruisis' article on How to achieve the best negotiation outcomes or listen to her podcast episode.

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.	Nov-25	9am-5pm	**In-person, Vancouver**
	Two segments Dec-13 & Dec-14	9am-12:30pm	Live Webinar

» **READ** instructor Pam Penner's article on communicating with difficult people.

NEW **Virtual Presentation Design and Delivery Certificate Program** For the foreseeable future, delivering virtual presentations to internal and external audiences will be a critical professional skill. This six-module certificate program will demonstrate to your organization, clients, potential employers, and other key stakeholders that you can design and deliver engaging and effective professional virtual presentations.	Six segments Oct-20, Oct-27, Nov-03, Nov-10, Nov-17 & Nov-24	1pm-3pm	Live Webinar

» **SEE** page 106 for more details on this program.

ACCOUNTING & ASSURANCE
- Audit & Assurance
- Financial Reporting
- Management Accounting

ETHICS

FINANCE & ECONOMICS
- Business Valuations
- Corporate Finance
- Financial Modelling

PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT
- Communication & Negotiation
- Creative Thinking & Decision-Making
- Self-Management & Wellness
- Teamwork & Leadership
- Resilient & Advanced Resilient Leadership Certificate Program

PUBLIC PRACTICE MANAGEMENT

STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE
- Risk Management & Fraud
- Strategy, Governance & Human Resource
- Strategic & Advanced Strategic Management Certificate Programs

TAXATION
- Commodity Tax
- Corporate & Personal Tax
- Not-For-Profit Organizations
- Trusts & Estates

TECHNOLOGY & INNOVATION
- Business Transformation & Emerging Issues
- Software & Tools

WEALTH MANAGEMENT

PD NEXUS DAYS

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.	Mar-07	9am-12:30pm	Live Webinar

» **DIDN'T FIND A SEMINAR?** Other Communication & Negotiation titles may be available on-demand.

CREATIVE THINKING & DECISION-MAKING

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, develop skills, and even core values.	Nov-16	9am-12pm	Live Webinar

SELF-MANAGEMENT & WELLNESS

Balancing Your Wheels Adapting to unforeseen circumstances is now a must, not just a nice to have. Apply simple tools to enhance the quality of your life. Amplify your ability to prioritize your life according to your priorities as you boldly manage all of the activity and distractions in our world today.	Nov-25	9am-5pm	**In-person, Vancouver**
Becoming ... what you really want to be This course outlines the path and provides the motivation to follow it. We can all do remarkable things when we acquire the essential tools and understand how to navigate the daunting obstacles life can throw at us. You'll never look back on your regrets after taking this unique, inspiring learning experience.	Three segments Nov-22, Nov-23 & Nov-24	10am-12:30pm	Live Webinar

Seminar Schedule | PD Passports | Nexus Days | Executive Programs | Certificate Programs

ACCOUNTING & ASSURANCE
Audit & Assurance
Financial Reporting
Management Accounting
ETHICS
FINANCE & ECONOMICS
Business Valuations
Corporate Finance
Financial Modelling
PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT
Communication & Negotiation
Creative Thinking & Decision-Making
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PUBLIC PRACTICE MANAGEMENT
STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE
Risk Management & Fraud
Strategy, Governance & Human Resource
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TAXATION
Commodity Tax
Corporate & Personal Tax
Not-For-Profit Organizations
Trusts & Estates
TECHNOLOGY & INNOVATION
Business Transformation & Emerging Issues
Software & Tools
WEALTH MANAGEMENT
PD NEXUS DAYS

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.	Nov-08 Mar-01	9am-12:30pm 9am-12:30pm	Live Webinar 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.	Oct-19 Nov-17 Mar-20	9am-5pm 9am-5pm 9am-5pm	Live Webinar **In-person, Vancouver** 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.	Oct-27 Dec-05 Feb-16	9am-5pm 9am-5pm 9am-5pm	Live Webinar **In-person, Vancouver** Live Webinar
Emotional Intelligence (EQ) – The Myths and The Mastery The research is crystal clear – regardless of the type of work, EQ is the cornerstone of superior performance. When star performers were analyzed the one consistent common denominator was, they had healthy EQ! The purpose of this course is to demystify EQ, help people assess their current level of EQ, and most importantly, provide proven and practical strategies on how to develop one's EQ.	Nov-15	9am-12:30pm	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-12	9am-5pm	Live Webinar

Seminar Schedule
PD Passports
Nexus Days
Executive Programs
Certificate Programs

Leading Self and Emotional Intelligence	Dec-08	9am-12:30pm	Live Webinar

Learn how to apply factual thinking to better deal with your 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.

» **READ** instructor Glen Sollor's article on strategies for getting out of burnout or listen to his podcast episode.

NEW **Productivity Hacks for Busy Accountants**	Oct-24	8am-10am	Live Webinar

Endless meetings, bottomless spreadsheets, constant reporting deadlines. As an accountant, do you feel like you're drowning in work? You're not alone. Today, more than ever, finance and accounting professionals are expected to deliver more, quicker. Learn how to leverage automation and regain control of your time to become more efficient and boost your career.

Resiliency and Grit: Bounce Back from Adversity and Challenge	Two segments Oct-24 & Oct-25	8:30am-12pm	Live Webinar
	Mar-23 & Mar-24	8:30am-12pm	Live Webinar

Do you have the resiliency and grit you need to bounce back quickly from setbacks, gain strength from adversity, and model, support and encourage those qualities in yourself, your family, and work colleagues? Through stories, exercises and examples you will learn how to apply the thinking and take action that leads to greater ease, confidence and effective outcomes in your life and career. Leave with actionable insights and valuable tools.

The Four Intelligences	Dec-07	9am-12:30pm	Live Webinar

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.

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

Seminar Schedule
PD Passports
Nexus Days
Executive Programs
Certificate Programs

***NEW* The Power of Habit** Now is the perfect time to reassess your habits and challenge yourself to live the life you really want. If you have been trying to make the same changes for years, it may be that you need a new approach to personal change. Discover how to find the real inspiration you need to make change and learn the success habits that build a happier, more productive life.	Two segments Oct-31 & Nov-01 Mar-02 & Mar-03	 8:30am-12pm 8:30am-12pm	 Live Webinar 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.	Oct-25 Dec-07	9am-5pm 9am-5pm	Live Webinar **In-person, Vancouver**
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-02	9am-5pm	Live Webinar

» **READ** instructor Terry Small's article on reading comprehension.

We Have to Talk: Having the Difficult Conversation In a recent Google search, dozens of books on the topic of crucial, fierce, important conversations were found. One common theme emerges from this literature – the fear of difficult conversations is often more stressful than the actual conversation. This workshop places difficult conversations at the core of successful work relationships.	Dec-15	9am-5pm	Live Webinar

» **DIDN'T FIND A SEMINAR?** Other Self-Management & Wellness titles may be available on-demand.

TEAMWORK & LEADERSHIP

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.	Nov-21	9am-5pm	**In-person, Vancouver**
Dispelling the Myth of "Effective Meetings": Engaging Virtual Meetings Your Employees Will Want to Attend The objective of this seminar is to have participants leave the session with a specific planning framework tool designed to assist their team in building meetings that are relevant, productive, engaging and yes, even welcomed by others in their organization.	Dec-09	9am-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.	Dec-06	9am-5pm	Live Webinar
Empowering and Engaging Others In the current economic climate, and with the growing expectations of increasingly demanding employees, developing the competencies of leaders and managers is key to improving individual, organizational, and business performance. This highly interactive course provides leaders and managers with the tools and techniques, confidence and practice, to become highly effective managers.	Dec-13	9am-5pm	Live Webinar

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Seminar Schedule
PD Passports
Nexus Days
Executive Programs
Certificate Programs

NEW **Entrepreneurial Accountant: Stop Managing, Start Leading** As we emerge from a post-pandemic world and our business environment changes, it's not enough for accountants to just deliver the numbers. The accountants who will thrive are those that have learned to think beyond spreadsheets and lead with an entrepreneurial mindset. Learn how to boost your accounting career and obtain toolkits and frameworks you can immediately use with your teams.	Dec-08	8am-10am	Live Webinar
Essential Skills for Managers The purpose of this course is to provide managers who are relatively new in their careers with the foundational knowledge and skills that enable them to perform their people management responsibilities. Cover all the areas that new leaders typically need to focus on, and learn through practical examples and tools which are used extensively in the session.	Two segments Nov-22 & Nov-23	9am-12:30pm	Live Webinar
High Performing Team Member Gain an awareness about what it takes to play a constructive role as a member of a high-performing team. Special emphasis is placed on the interpersonal skills that team members need, for example advocacy, listening, and conflict resolution. The workshop is based on Patrick Lencioni's five-step framework that includes the practices of building trust, resolving conflict, developing commitment, holding team members accountable, and achieving results. » **READ** instructor Laura Villacruisis' article on How to develop high-performance teams or listen to her podcast episode.	Feb-02	9am-5pm	**In-person, Vancouver**

Improving Collaboration on Remote Teams for Better Teamwork, Engagement and Performance The complexity of business today requires more sophistication and expertise than any one person can provide. This hands-on workshop is built around foundational collaborative practices that improve engagement, teamwork, and performance. Work on the use of these practices and tools for leading teams, team projects, and remote teams.	Dec-06	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.	Nov-15	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.	Oct-26 Nov-16	9am-5pm 9am-5pm	Live Webinar **In-person, Vancouver**
Leading Professional Teams – Successfully Transitioning from Professional Expert to Team Leader Transitioning from a technical accounting expert to leading a team of accounting and other professionals is one of the most significant milestones in a person's career. It can, however, be a challenging transition. Leading teams means taking on new responsibilities and requires a broad portfolio of skills and an understanding of human psychology. Explore what it takes to lead teams effectively as well as the hurdles that trip up many aspiring team leaders.	Nov-02	9am-12:30pm	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-09	9am-5pm	Live Webinar
Managing My People Managers find it challenging to maximize their peoples' contributions 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 segments Mar-21 & Mar-22	8:30am-12pm	Live Webinar
Managing Transitions: Leading the People Side of Change When you think about how difficult it is to change yourself, you realize how difficult it is to change someone else, not to mention a team or organization. This workshop will furnish you with dozens of practical techniques and tools to help yourself and others prepare for, deal, with, and make the most of change. If you can implement change more effectively, you are going to make your life a lot easier, generate much better results, and enhance your competitive edge.	Nov-29	9am-12:30pm	Live Webinar
Resiliency and Grit: Bounce Back from Adversity and Challenge Do you have the resiliency and grit you need to bounce back quickly from setbacks, gain strength from adversity, and model, support and encourage those qualities in yourself, your family, and work colleagues? Through stories, exercises and examples you will learn how to apply the thinking and take action that leads to greater ease, confidence and effective outcomes in your life and career. Leave with actionable insights and valuable tools.	Two segments Oct-24 & Oct-25 Mar-23 & Mar-24	8:30am-12pm 8:30am-12pm	Live Webinar Live Webinar

***NEW* The Power of Habit** Now is the perfect time to reassess your habits and challenge yourself to live the life you really want. If you have been trying to make the same changes for years, it may be that you need a new approach to personal change. Discover how to find the real inspiration you need to make change and learn the success habits that build a happier, more productive life.	Two segments Oct-31 & Nov-01 Mar-02 & Mar-03	 8:30am-12pm 8:30am-12pm	 Live Webinar Live Webinar
What Do People Want? Motivating Yourself and Others An important role of managers in the workplace is to get things done through other people. To do this they need to be able to motivate employees, but that is easier said than done! This one-day, highly interactive course provides practical tools and techniques for understanding what motivates people and how to develop and maintain a motivated workforce.	Dec-16	9am-5pm	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.	Nov-23 Nov-30	9am-5pm 9am-5pm	**In-person, Vancouver** Live Webinar

» **DIDN'T FIND A SEMINAR?** Other Teamwork & Leadership titles may be available on-demand.

RESILIENT & ADVANCED RESILIENT LEADERSHIP CERTIFICATE PROGRAM

Advanced Resilient Leadership – From Toxic to Terrific: Change Your Team for the Better This session will help you develop a game plan to move teams from isolated to all in. Helping your team move away from apathy, cynicism, and negativity, and towards caring, optimism, ownership, positive energy, and resilience is not a waiting game. It is a decision to take action. You will take away 10 useable ideas that you and your team can try out right now.	Feb-02	8:30am-12pm	Live Webinar
Advanced Resilient Leadership – Brave Spaces and a Curious Mindset: Amp up the Learning! Is it time to think again? Is your team learning and unlearning? Old beliefs and stale thinking can keep teams stuck and unproductive. How can you support your team to keep stepping up to new challenges, learn fast, and continue to perform? This session is packed with a dozen ideas leaders can apply so people are excited to learn together, share ideas, ask questions, make suggestions, and improve over time.	Feb-09	8:30am-12pm	Live Webinar
Advanced Resilient Leadership – From Success to Significance: Make Work Meaningful How does an accountant make work meaningful? In so many ways. If you are beginning to ask this question and are ready to take some concrete actions to bring purpose to work, this session will help. Learn strategies to optimize your group's environment, language, rituals, and structures to bring more energy and attention to what makes work meaningful and satisfying.	Feb-16	8:30am-12pm	Live Webinar

Advanced Resilient Leadership – From Languishing to Flourishing: How to Get Happy at Work Leave inspired about what is possible when you focus on opportunities for real joy in the workplace. What would happen if people finished every day of work thinking, “that was awesome”? It is the uplifting moments we remember because we learned something, felt proud of something, laughed and smiled about something, or had a real moment of connection with someone. This session will outline ways to make those days happen more often.	Feb-23	8:30am-12pm	Live Webinar
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-23 Mar-15	8:30am-12pm 8:30am-12pm	Live Webinar Live Webinar
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-02 Feb-22	8:30am-12pm 8:30am-12pm	Live Webinar Live Webinar
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-26 Feb-15	8:30am-12pm 8:30am-12pm	Live Webinar Live Webinar

Seminar Schedule
PD Passports
Nexus Days
Executive Programs
Certificate Programs

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-16 Mar-08	8:30am-12pm 8:30am-12pm	Live Webinar Live Webinar
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-09 Mar-01	8:30am-12pm 8:30am-12pm	Live Webinar Live Webinar

» **THE RESILIENT** and **ADVANCED RESILIENT LEADERSHIP** certificate programs are taught by Tammy Robertson, listen to her podcast to learn how you can be a resilient leader. Read Tammy's latest article The Future of Work - What it Means for Leaders.

PUBLIC PRACTICE MANAGEMENT

***NEW* CPA Firm Manager Leadership Skills Certificate Program** Demonstrate to CPA firms that you have learned essential communication and productivity skills that are key to being a manager. This eight-module certificate program was specifically designed to provide new managers working at a CPA firm with the important skills required as a manager and leader. » **SEE** page 95 for more details on this program.	Eight segments Oct-05, Oct-12, Oct-19, Oct-26, Nov-02, Nov-09, Nov-16 & Nov-23	2pm-4pm	Live Webinar
PD Nexus: Public Practice Insights Come join your practitioner colleagues at this annual conference designed to address the challenges facing CPAs in public practice. With breakout streams on technical topics on tax and Handbook standards that will impact your practice, a plenary session answering the question, “What gets accountants into trouble?” and a session on how to train your brain to better cope with stress, you will leave this day with the new knowledge and skills you need to thrive in public practice! » **SEE** page 95 for more details on this Nexus Day.	Nov-22	8:30am-4:30pm	Live Webinar

» **DIDN’T FIND A SEMINAR?** Other Public Practice Management titles may be available on-demand.

STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE

RISK MANAGEMENT & FRAUD

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.	Two segments Feb-16 & Feb-17 *Available Online* *On-demand*	9am-12:30pm	Live Webinar
Fraud Risk Management Effective fraud risk management requires an integrated approach ensuring the full spectrum of unique risks are addressed. This holistic approach brings together key principles and practices using the current COSO fraud risk management framework. Case discussions, sample codes of conduct, fraud policies, fraud risk checklists, numerous examples, and other practical materials will assist participants to build a corporate culture and framework that prevents and detects fraudulent activity.	Two segments Nov-23 & Nov-24 *Available Online* *On-demand*	9am-12:30pm	Live Webinar

» **DIDN'T FIND A SEMINAR?** Other Risk Management & Fraud titles may be available on-demand.

STRATEGY, GOVERNANCE & HUMAN RESOURCE

Employment Law and 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-26 Feb-16	9am-5pm 9am-5pm	**In-person, Vancouver** Live Webinar
Employment Standards Overview This seminar provides an overview introduction to key provisions of the BC Employment Standards Act (ESA), with emphasis on new obligations and commonly misunderstood requirements.	Nov-29 *Available Online On-demand*	9am-12:30pm	Live Webinar
ERP Selection and Implementation As businesses change, the question "What systems do we need to manage our business activities?" is always raised. The term ERP strikes fear in many, as most people have heard horror stories about implementations gone wrong. This session will eliminate those fears and provide some answers on ERP systems for both small and large organizations, as well as the steps required to prepare your organization for selecting, implementing, and supporting an ERP system.	Dec-06 Feb-21	8:30am-12:30pm 8:30am-12:30pm	Live Webinar Live Webinar
Governance in NFPOs Not-for-profit organizations (NFPOs) are diverse and their expectations of directors and good governance can vary widely. This session explores some of the unique governance challenges facing NFPOs with a view to incorporate best practice and identify emerging issues in order to provide effective oversight.	*Available Online On-demand Only*	2 hours	On-demand

Handling Termination of Employment This session will provide an overview of issues surrounding the termination of employment, and will include any recent case law updates in the area. Obtain a comprehensive summary of employer termination liabilities, become more aware of all the issues relating to termination of employment, and learn a practical framework for planning a termination.	Dec-06 *Available Online On-demand*	8:30am-10:30am	Live Webinar
NEW **Managing the New Hybrid Workplace** This course is designed for employers who are considering allowing long-term hybrid and remote work, or those who have already transitioned to it but want to avoid unexpected liabilities and set reasonable policy limits.	Sep-20 *Available Online On-demand*	8:30am-10am	Live Webinar
Mergers and Acquisitions – Aligning your Financial Systems, Processes & People Mergers and acquisitions have become a part of normal business for many companies and often these opportunities come when you least expect it. Walk through the steps required for aligning your financial systems, business practices, and people in this new organization.	Nov-10 Mar-14	8:30am-10:30am 8:30am-10:30am	Live Webinar Live Webinar
NEW **The Critical Role of Management in Board and Committee Meetings** Senior executives and management play a key interfacing role with their boards and its committees but are rarely able to focus on and hone this unique skill. Discover practical tips on how to elevate your contribution to your board. Deepen your governance knowledge and build your skills in supporting, communicating with, and reporting to the board and/or a board committee.	Dec-08	9am-12:30pm	Live Webinar

NEW **Why Successful Companies Fail: Forewarned is Forearmed (Live Webinar)** Not recognizing when the fundamentals of business have changed borders on corporate inertia and negligence. With the right tools and a different understanding of volatility, disruption, and uncertainty, decline is not inevitable. The solution lies in recognizing and acting on some uncomfortable but rarely acknowledged truths. This webinar outlines the scope of the problem and tells you what you need to do to ensure it doesn't kill your golden goose.	Nov-08	9am-12pm	Live Webinar
Workplace Law: All You Wanted to Know About and Were Afraid to Ask This course will cover the legal issues in workplace law that most frequently arise, impacting your organization's ability to deal effectively with human resources. Participants will be able to address with greater confidence workplace human resources issues that spill over into legal or potentially legal questions, and avoid common potential pitfalls in workplace legal issues.	Nov-29 Dec-14	9am-12:30pm 9am-12:30pm	Live Webinar **In-person, Vancouver**

» **DIDN'T FIND A SEMINAR?** Other Strategy, Governance & HR titles may be available on-demand.

STRATEGIC & ADVANCED STRATEGIC MANAGEMENT CERTIFICATE PROGRAMS

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.	Dates for live sessions to be announced		
Advanced Strategic Management Certificate: Maps In this session, participants will gain experience in strategy mapping and integration. Using strategy mapping, participants will be able to understand how to assess and consider limited resources in strategic planning and how to best make hard choices between strategic alternatives, priorities, and resources.	Nov-02 Feb-08	9am-5pm 9am-5pm	**In-person, Vancouver** **In-person, Vancouver**
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-29 Feb-01	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-26 Nov-18 Nov-30 Jan-26	9am-5pm 9am-5pm 9am-5pm 9am-6pm	**In-person, Victoria** **In-Person, Vancouver** Live Webinar Live Webinar
Strategic Management Certificate: Strategic Planning Examine the link between stated organizational goals, the business environment, and visible strategies, with a focus on the functional strategy level. Gain an appreciation of the tools used to develop and execute successful strategies.	Oct-24 Oct-27 Nov-28 Jan-25	9am-5pm 9am-5pm 9am-5pm 9am-5pm	**In-person, Victoria** **In-person, Vancouver** Live Webinar Live Webinar

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

Seminar Schedule
PD Passports
Nexus Days
Executive Programs
Certificate Programs

Strategic Management Certificate: Team Development	Nov-08	9am-5pm	Live Webinar
Gain an in-depth understanding of factors impacting team effectiveness, including team design, stages of team development, and ingredients necessary for achieving results.	Feb-02	9am-5pm	Live Webinar

» The **STRATEGIC** and **ADVANCED STRATEGIC MANAGEMENT** Certificate Programs are led by Mia Maki. Read Mia's article on Doughnut Economics and the push for regenerative, distributive systems.

TAXATION

COMMODITY TAX

GST/HST: CRA Audit Building upon GST/HST: The Fundamentals, this seminar provides an in-depth examination of the audit process. Participants will review a typical Canada Revenue Agency (CRA) audit from start to finish and learn about the most common audit exposures that create assessments for taxpayers. The seminar provides information to proactively prepare for a future audit, manage an audit, and cope with after-audit issues, including the assessment of penalties and the objection process.	Dec-09 *Available Online On-demand*	9am-5pm	Live Webinar
GST/HST – Fundamentals The course provides an overview of Canada's federal sales tax. It begins with a review of the significance of the three different types of supplies, as their misinterpretation can create significant exposures for suppliers located in both non-HST and HST provinces. Registration, collection requirements, who pays tax, input tax credit entitlements, some cross-border issues, and common sources of errors and assessments are reviewed.	Nov-07 Nov-14 *Available Online On-demand*	9am-5pm 9am-5pm	Live Webinar **In-person, Vancouver**
GST/HST – NFPOs This seminar focuses on the unique rules applicable to public service bodies, including the distinction between charities and other not-for-profit organizations. Participants will gain a greater awareness of the application of GST/HST and exempting provisions applicable to this unique sector, including common pitfalls and errors. A case study will be used to illustrate and reinforce the application of some of the complex rules applicable to a typical not-for-profit organization.	Nov-15 *Available Online On-demand*	9am-5pm	Live Webinar

GST/HST – Real Property	Nov-09	9am-5pm	Live Webinar
This course explores the important GST/HST issues associated with real property transactions, including construction or substantial renovation of residential property, sale of real property including contract assignments, joint-ventures and partnerships, issues related to leasehold allowances and expense recoveries, and the special rules applicable to supplies of real property by charities and other public service bodies.	Dec-06	9am-5pm	Live Webinar
	Available Online On-demand		

» **INSTRUCTOR** Read more about instructors Noah Sarna and Rebecca Loo on page 9.

GST/HST – Specific Topics	Oct-27	9am-5pm	Live Webinar
Failure to be aware of the complexities of the GST and HST can result in lost recovery opportunities or worse, large tax assessments. This course presents advanced GST/HST topics to enhance the participant's knowledge about Canada's value-added-tax. Concepts related to the application and the recovery of GST/HST will be discussed in addition to an update on new and trending issues.	*Available Online On-demand*		
GST/HST – Update 2021	Nov-23	9am-12:30pm	Live Webinar
This course will provide an overview of the legislative and case law updates between 2020 and mid-2021 relating to GST/HST, with an emphasis on the new simplified registration rules for non-residents and collection obligations for platform operators, new rules for fulfillment houses, and accommodation platforms. Note: Course content remains unchanged from offerings in 2021. This course is not recommended if you previously attended GST/HST – Update 2021.	*Available Online On-demand*		

PST – Review of Jurisdictional Sales Tax This seminar is intended to provide exposure to the application of the four different provincial sales tax regimes, including policy intent and application of a “use” tax compared to the application of a “value-added tax” (VAT). Participants will be able to determine when to register and which tax applies, find opportunities to use exemptions, know how costs are impacted by PST, and be better prepared to respond to government audit queries.	Nov-22	9am-12:30pm	Live Webinar

» **DIDN’T FIND A SEMINAR?** Other Commodity Tax titles may be available on-demand.

CORPORATE & PERSONAL TAX

Corporate Restructuring – Application for Private Corporations Practitioners involved with reorganizing private corporations need to consider a wide range of technical rules, develop a plan that meets the client’s objectives, navigate the practical challenges of implementing the plan, and communicate the plan to other professionals. Using mini-cases this seminar provides a practical approach and guidance on identifying, planning, documenting, and implementing reorganizations of private corporate groups.	Nov-03 Nov-22 *Available Online On-demand*	1:30pm-5pm 9am-12:30pm	**In-person, Vancouver** Live Webinar
Corporate Restructuring – Fundamentals This seminar highlights fundamental income tax considerations that arise in corporate reorganizations, including a discussion of related provisions and key pitfalls. Participants gain a summary of the tools available to effect transfers or mergers in a tax-efficient manner, and considerations of traps and anti-avoidance rules when entering into such transactions. Examples are used to highlight strategies and issues associated with the process of initiating a corporate reorganization.	Dec-07 Dec-13 *Available Online On-demand*	9am-5pm 9am-5pm	Live Webinar **In-Person, Vancouver**

Corporate Restructuring – Section 85: Transfer of Property This seminar covers selected tax aspects explaining the transfer of property to a corporation using the Section 85 rollover rules. Each module contains specific examples and cases designed to help participants review relevant tax theory and focus on major tax planning issues, including filing requirements and ensuring the transaction is not caught by key anti-avoidance provisions.	Nov-07 Nov-14 *Available Online On-demand*	9am-5pm 9am-5pm	**In-person, Vancouver** Live Webinar
Corporate Tax – Compliance and Planning in T2 Preparation This seminar addresses a comprehensive review of income tax compliance and planning issues relevant to the preparation of Canadian corporate income tax returns, including the technical and practical issues arising from these diverse issues as a means of enhancing the ability to prepare and/or review complete, accurate corporate income tax returns. This seminar identifies and addresses planning opportunities that can impact taxpayers filing corporate returns.	Nov-07 Jan-25 *Available Online On-demand*	9am-5pm 9am-5pm	Live Webinar Live Webinar
Corporate Tax – Investment Holding Companies 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?	Nov-21 Nov-29 Feb-16 *Available Online On-demand*	9am-12:30pm 9am-12:30pm 9am-12:30pm	**In-person, Vancouver** 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 on this course will be on transactions between Canadian private business owners and/or their privately held corporations.	Nov-04 Nov-10 Feb-22 *Available Online On-demand*	9am-5pm 9am-5pm 9am-5pm	**In-person, Vancouver** Live Webinar 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 GROP, LRIP, CDA, and the three RDTOH pools. The focus of this seminar is applying an understanding of these pools to effective tax planning.	Nov-03 Nov-04 Nov-10 *Available Online On-demand*	9am-12:30pm 9am-12:30pm 9am-12:30pm	**In-person, Vancouver** **In-person, Victoria** 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 primarily focuses on the taxation of private companies.	Two segments Oct-26 & Oct-27 Mar-16 & Mar-17 *Available Online On-demand*	9am-5pm 9am-5pm	Live Webinar Live Webinar
Corporate Tax – Section 55: How Safe Are Your Dividends? Section 55 of the Income Tax Act (ITA) contains anti-avoidance rules that can convert a tax-free intercorporate dividend to a taxable capital gain, and these rules 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 understanding of these rules and their application.	Oct-28 Nov-09 Feb-07 *Available Online On-demand*	9am-5pm 9am-5pm 9am-5pm	Live Webinar **In-person, Vancouver** Live Webinar
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 corporation. Common traps and planning opportunities that arise when shutting down private corporations via dissolution, amalgamation, or wind-up will be covered.	Nov-04 Nov-23 *Available Online On-demand*	9am-5pm 9am-5pm	**In-person, Vancouver** 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 signifi antly 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.	Two segments Oct-24 & Oct-25 Nov-02 *Available Online On-demand*	9am-12:30pm 9am-5pm	Live Webinar **In-person, Vancouver**
Corporate Tax – SR&ED Part 1 This course addresses fundamental content on SR&ED. Participants are provided information and skills required to navigate the SR&ED claim process including: who is eligible, what types of work are eligible, and how the SR&ED program intersects with other government subsidies and stimulus payments. Part 1 covers the preparation of SR&ED claims and how to incorporate these claims into corporation tax returns. For advanced content on SR&ED, please see Corporate Tax – SR&ED Part 2.	Nov-29 Jan-24 *Available Online On-demand*	9am-12:30pm 9am-12:30pm	Live Webinar Live Webinar
Corporate Tax – SR&ED Part 2 This course builds on the fundamental content of Part 1 and presents more advanced content on SR&ED. Participants are provided information and skills required to navigate the SR&ED claim process including: who is eligible, what types of work are eligible, and how the SR&ED program intersects with other government subsidies and stimulus payments. It also focuses on current issues including updates to legislation and case law, CCPC status, government assistance, materials, and ITC recapture.	Dec-01 Jan-26 *Available Online On-demand*	9am-12:30pm 9am-12:30pm	Live Webinar 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-08	9am-12:30pm	Live Webinar

Income Tax – 5 Years of Developments Income tax changes and evolves over time and professionals need to maintain their current stock of knowledge while learning about new trends. This seminar provides an opportunity for those who lack the ability to remain updated on continual changes by reviewing the most important federal income tax developments that have occurred over the last five years. Participants can quickly become knowledgeable about crucial tax updates in a single seminar.	Dec-05 Feb-08 *Available Online On-demand*	9am-5pm 9am-5pm	Live Webinar Live Webinar
Income Tax – Administration and Risk Management This seminar focuses on the procedures and processes of practicing tax, highlighting areas to protect practitioners from liability. The seminar discusses technical issues in areas where CPA Professional Liability Plan claims show the greatest number and dollar value of claims. The session will also review the scheme of penalties and interest in the Act, the CRA's current administration of those provisions, and the use of the Taxpayer Relief provisions to reduce the cost of penalties.	Nov-08 *Available Online On-demand*	9am-5pm	Live Webinar
Income Tax – Advanced Planning Strategies This seminar identifies tax-planning opportunities relevant to practitioners working with Canadian private corporations and high net worth individuals. The seminar presents planning opportunities with respect to restructuring of asset profiles, the sale of a business, business succession and estate planning, as well as the use of partnerships and trusts. Participants will gain a high-level review of anti-avoidance provisions frequently encountered in the context of these plans, primarily in the context of specific plans or examples.	Nov-14 Nov-18 Feb-17 *Available Online On-demand*	9am-5pm 9am-5pm 9am-5pm	Live Webinar **In-person, Vancouver** Live Webinar

Income Tax – Consequences to Avoid	Dec-19	9am-5pm	Live Webinar
Straightforward and seemingly benign situations can sometimes trigger adverse income tax repercussions and this seminar will equip participants with the skills to identify, prevent, and manage these outcomes. This seminar explains the income tax rules and reasons behind the negative result ensuing from particular situations. Participants will receive suggestions to manage and mitigate problems, as well as tips for recognizing relevant precursors and triggers.	Feb-21 *Available Online On-demand*	9am-5pm	Live Webinar
Income Tax – Employee Benefits	Nov-10	9am-12:30pm	Live Webinar
This seminar provides a review of the income tax implications for benefits, including cases of owner-managers and arm's length employees. Participants will increase their ability to advise on tax-effective employee remuneration strategies with benefits plans by assessing the tax-effectiveness of various benefit plans and employment benefit choices as well as ensuring compliance with the tax rules.	Feb-10 *Available Online On-demand*	9am-12:30pm	Live Webinar
Income Tax – Employee vs. Contractor	Nov-17	9am-12:30pm	Live Webinar
This seminar provides detailed information on the difference in the designation of individuals as contractors vs. employees for tax purposes from both the corporate and individual perspectives. Tax rates, CRA guidelines and considerations as well as case law examples will be covered and then case studies will be used to allow for participant application.	Feb-15 *Available Online On-demand*	9am-12:30pm	Live Webinar

Income Tax – Everyday Issues for General Practitioners CPAs in public practice who assist clients with income tax compliance and plans find that even routine matters can have complexities, alternatives, and uncertainties. This seminar identifies income tax matters that practitioners frequently encounter and demonstrates how income tax rules apply in everyday situations. Practical issues are presented as examples and the seminar emphasizes opportunities, problems, suggestions, and plans for each topic.	Oct-19	9am-5pm	Live Webinar
	Oct-27	9am-5pm	**In-person, Vancouver**
	Nov-04	9am-5pm	**In-person, Kelowna**
	Nov-08	9am-5pm	**In-person, Kamloops**
	Nov-15	9am-5pm	**In-person, Victoria**
	Nov-16	9am-5pm	Live Webinar
	Nov-29	9am-5pm	**In-person, Prince George**
	Feb-10	9am-5pm	Live Webinar
	Available Online On-demand		
Income Tax – Income Splitting The Income Tax Act contains several measures related to income splitting; and while some are permissive, most are restrictive. This 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.	Oct-24	9am-5pm	Live Webinar
	Nov-23	9am-5pm	**In-person, Vancouver**
	Jan-27	9am-5pm	Live Webinar
	Available Online On-demand		
***NEW* Income Tax – Investment Income** Figuring out how much to report investment income and how exactly to report it on income tax returns is becoming more complex as banks and online brokerages make it easier for investors to access more complex investment products. This course will review the basic concepts of income vs. capital and timing of income/gain recognition and apply them to investment products currently in the market, including put/call options and cryptocurrency.	Oct-18	9am-12:30pm	**In-person, Vancouver**
	Nov-08	9am-12:30pm	Live Webinar
	Feb-24	9am-12:30pm	Live Webinar

Income Tax – Owner and Manager Compensation This seminar provides participants with a working knowledge of the tax effects of the use of salary and dividends as compensation to owner-managed business from both the shareholder and corporate perspective. Using case study examples, the course will look at inter-corporate transactions for small businesses including management fees, rent, and intercompany loans.	Nov-16 Nov-25 Jan-27 *Available Online On-demand*	9am-12:30pm 9am-12:30pm 9am-12:30pm	Live Webinar **In-person, Vancouver** Live Webinar
Income Tax – Partnerships Partnerships are commonly used business vehicles/ structures and it's important to know how the taxation rules differ in order to advise clients with or considering partnership structures. This course examines the manner in which partnerships and their partners are taxed, with reference to the relevant statutory provisions, case law, and CRA administrative positions.	Nov-03 Feb-08 *Available Online On-demand*	9am-5pm 9am-5pm	Live Webinar **In-person, Vancouver**
Income Tax – Planning for Business Succession This seminar provides practical knowledge of the principal business succession considerations. Participants will walk through the various stages of a business life cycle, with a view to identifying opportunities, techniques, and tax considerations associated to intra-family and arm's length succession planning for private companies. This seminar provides the knowledge and tools necessary to identify, plan, and manage business succession considerations for owner-managers of private companies.	Oct-25 Nov-21 *Available Online On-demand*	9am-5pm 9am-5pm	**In-person, Vancouver** Live Webinar

Seminar Schedule
PD Passports
Nexus Days
Executive Programs
Certificate Programs

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 situation and the unexpected issues or outcomes that can arise in such cases.	Oct-28 Nov-04 Feb-03 *Available Online On-demand*	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-26 Nov-03 Feb-24 *Available Online On-demand*	9am-5pm 9am-5pm 9am-5pm	Live Webinar **In-person, Vancouver** Live Webinar

Seminar Schedule
PD Passports
Nexus Days
Executive Programs
Certificate Programs

Income Tax – Update 2022

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. Learn how the current levels of personal and corporate tax rates affect and possibly change accepted tax planning techniques. A review of the current integration of personal and corporate tax rates is provided. Course coverage will be largely restricted to changes in the last year.

Oct-19	9am-5pm	Live Webinar
Oct-20	9am-5pm	**In-person, Kelowna**
Oct-21	9am-5pm	Live Webinar
Oct-25	9am-5pm	**In-person, Vancouver**
Oct-26	9am-5pm	Live Webinar
Oct-27	9am-5pm	**In-person, Richmond**
Oct-29	9am-5pm	Live Webinar
Nov-02	9am-5pm	Live Webinar
Nov-05	9am-5pm	Live Webinar
Nov-08	9am-5pm	**In-person, Vancouver**
Nov-08	9am-5pm	**In-person, Surrey**
Nov-09	9am-5pm	**In-person, Kamloops**
Nov-15	9am-5pm	**In-person, Vancouver**
Nov-16	9am-5pm	**In-person, Victoria**
Nov-17	9am-5pm	**In-person, Coquitlam**
Nov-19	9am-5pm	Live Webinar
Nov-21	9am-5pm	Live Webinar
Nov-24	9am-5pm	**In-person, Vancouver**
Nov-28	9am-5pm	**In-person, Prince George**

Continued on following page

ACCOUNTING & ASSURANCE
- Audit & Assurance
- Financial Reporting
- Management Accounting

ETHICS

FINANCE & ECONOMICS
- Business Valuations
- Corporate Finance
- Financial Modelling

PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT
- Communication & Negotiation
- Creative Thinking & Decision-Making
- Self-Management & Wellness
- Teamwork & Leadership
- Resilient & Advanced Resilient Leadership Certificate Program

PUBLIC PRACTICE MANAGEMENT

STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE
- Risk Management & Fraud
- Strategy, Governance & Human Resource
- Strategic & Advanced Strategic Management Certificate Programs

TAXATION
- Commodity Tax
- Corporate & Personal Tax
- Not-For-Profit Organizations
- Trusts & Estates

TECHNOLOGY & INNOVATION
- Business Transformation & Emerging Issues
- Software & Tools

WEALTH MANAGEMENT

PD NEXUS DAYS

Income Tax – Update 2022 *Continued*	Nov-29	9am-5pm	Live Webinar
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. Learn how the current levels of personal and corporate tax rates affect and possibly change accepted tax planning techniques. A review of the current integration of personal and corporate tax rates is provided. Course coverage will be largely restricted to changes in the last year.	Dec-02	9am-5pm	**In-person, Vancouver**
	Dec-05	9am-5pm	Live Webinar
	Dec-08	9am-5pm	Live Webinar
	Dec-12	9am-5pm	Live Webinar
	Dec-16	9am-5pm	Live Webinar
	Dec-20	9am-5pm	Live Webinar
	Jan-20	9am-5pm	Live Webinar
	Jan-24	9am-5pm	**In-person, Vancouver**
	Feb-02	9am-5pm	Live Webinar
	Feb-09	9am-5pm	Live Webinar
	Available Online On-demand		
Personal Tax – Compliance and Planning in T1 Preparation	Nov-21	9am-5pm	Live Webinar
This seminar addresses technical and practical issues arising from the diverse issues encountered in the preparation and review of Canadian personal income tax returns. Participants will gain an overall understanding of tax compliance issues, enhancing their ability to prepare complete and accurate tax returns, and to identify and address planning opportunities which arise in the preparation of personal income tax returns.	Nov-23		**In-person, Vancouver**
	Available Online On-demand		
Personal Tax – Review of Tax Planning	Two segments Nov-03 & Nov-04	9am-5pm	Live Webinar
This 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.	*Available Online On-demand*		

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.	Feb-15 *Available Online On-demand*	8am-10am	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 course is compliance oriented with a high-level review of a wide range of issues and a focus on issue identification.	Four segments Nov-14, Nov-15, Nov-16 & Nov-17 *Available Online On-demand*	9am-12:30pm	Live Webinar

» **DIDN'T FIND A SEMINAR?** Other Corporate & Personal Tax titles may be available on-demand.

NOT-FOR-PROFIT ORGANIZATIONS

Taxation – Registered Charities and NFPOs This 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 to avoid loss of tax status, financial penalties, and bad press. Participants will gain the ability to identify tax issues, assess related risks, comply with the income tax rules, and complete charity and not-for-profit organization returns.	Nov-02 Feb-16 *Available Online On-demand*	9am-5pm 9am-5pm	Live Webinar Live Webinar

» **DIDN'T FIND A SEMINAR?** Other Not-for-Profit rganizations titles may be available on-demand.

Seminar Schedule
PD Passports
Nexus Days
Executive Programs
Certificate Programs

TRUSTS & ESTATES

RIP – Estate and Testamentary Trust Returns This seminar provides a review of the issues faced when preparing trust filings for 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. The seminar presents a series of practice case studies to illustrate the concepts in a practical manner and allows the participant to apply their knowledge to realistic filing situations commonly encountered in practice.	Dec-09 Jan-20 *Available Online On-demand*	9am-5pm 9am-5pm	**In-person, Vancouver** Live Webinar
RIP – Estate Planning This seminar provides a detailed review of important estate planning matters for practitioners who deal with owner-managers or clients with a high net worth. Participants will gain enhanced estate planning skills, an introduction to important tax and estate planning concepts, useful tips, and an updated reference source. Participants will develop a working understanding of how to initiate and undertake effective estate planning for clients while maintaining flexibility in the estate plan to manage risk.	Nov-02 Nov-22 *Available Online On-demand*	9am-5pm 9am-5pm	Live Webinar **In-person, Vancouver**
RIP – Terminal Filing The last tax return for a deceased individual carries significant implications for the executor and the inheritors of the will. In order to alleviate potential misunderstandings, this seminar provides a detailed technical review of the numerous issues faced when preparing terminal or year-of-death filings. Participants will receive a review of relevant tax issues, engagement management, updated sources of tax research, an overview of CRA assessing practices, and case studies.	Dec-06 Jan-20 *Available Online On-demand*	9am-5pm 9am-5pm	Live Webinar **In-person, Vancouver**

Taxation of Domestic Trusts – Advanced This seminar covers tax issues surrounding family trusts, with a focus on complex tax planning opportunities, potential tax traps, and technical challenges that may be encountered. A comprehensive analysis of the amendments to the Income Tax Act regarding tax on split income will be provided and participants will learn how to identify potential issues with current or proposed client structures to be able to propose solutions.	Nov-17 Jan-30 *Available Online On-demand*	9am-5pm 9am-5pm	**In-person, Vancouver** Live Webinar
Taxation of Domestic Trusts – Fundamentals This seminar provides an overview of trust relationships, how to complete basic returns for trusts and their beneficiaries, and how to identify and communicate basic tax planning benefits and opportunities that involve family trusts. It reviews the basic tenants of trust law, the provisions of the Income Tax Act, case law, and CRA administrative positions that are fundamental to the taxation of trusts.	Oct-20 Dec-07 *Available Online On-demand*	9am-5pm 9am-5pm	**In-person, Vancouver** Live Webinar
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.	Nov-22 *Available Online On-demand*	8am-10am	Live Webinar

» **DIDN'T FIND A SEMINAR?** Other Trusts & Estates titles may be available on-demand.

TECHNOLOGY & INNOVATION

BUSINESS TRANSFORMATION & EMERGING ISSUES

2022 Technology Update	Dec-08	9am-12:30pm	Live Webinar
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.	Feb-15	9am-12:30pm	Live Webinar
3 Ways Digital Transformation is Reinventing Accounting Digital transformation is shaping the future of accounting and the pace of digital change is faster than ever. No accountant can ignore the onslaught of AI, automation, and big data and during this session you will learn how technology is transforming accounting and what you can do to future-proof your finance career.	Dec-15	9am-12:30pm	Live Webinar

» **READ** instructor John Hetherington's article on Humanizing tech: The new way for accountants to add value or listen to his podcast episode.

Data Analytics and the Future of Finance Explore the importance of analytics to the future role of finance, as well as the challenges and opportunities for teams and individuals. Gain some fundamental ideas and techniques that can be immediately applied at work. Assess how prepared you and your organization are for the future role of finance, and how to proactively plan and develop your path to becoming an analytics professional.	Two segments Nov-22 & Nov-24	2pm-5:30pm	Live Webinar

NEW **Digital Transformation Toolbox – Preparing for the Future of Accounting** Technology advances are shaping the future of accounting and the pace of digital change is faster than ever. A recent survey of CFOs and controllers showed that digital transformation is their #1 focus in 2021, yet 70% of all digital transformations fail to reach their goals. No accountant can ignore the onslaught of AI, Blockchain and automation. Participate in this interactive discussion on how technology is transforming accounting, and how to future-proof your finance career.	Feb-23	8am-10am	Live Webinar
Emerging Technologies for Accountants, Including Blockchain and Cryptocurrencies Unlike technologies we use every day, many emerging technologies have the potential to change how we work in the future. This session will cover an assortment of technologies which are nearing mainstream adoption and help you understand what they do, how they work, as well as some of the potential risks and rewards they offer potential users.	Nov-07	9am-12:30pm	Live Webinar
Technology for CPAs – Don't Get Left Behind Survey today's IT environment and learn about computer hardware, software (including Office 2016), operating systems (including Windows 10) and what they mean for you, as well as peripheral devices. Learn about significant trends in information technology, how to take advantage of the opportunities presented, and improve the overall performance of your IT investment. Learn from real-time demonstrations of practical applications of the latest tools.	Two segments Jan-26 & Jan-27	9am-12:30pm	Live Webinar

» **DIDN'T FIND A SEMINAR?** Other Business Transformation & Emerging Issues titles may be available on-demand.

SOFTWARE & TOOLS

Advanced Excel For experienced Excel users seeking to elevate your skills, this seminar will provide critical advanced Excel skills in six key areas: collaborating with other users and securing workbooks; using tables to analyze and report data; integrating and manipulating data from external sources; creating and auditing complex formulas; advanced data analysis tools; and visualization techniques to analyze and communicate information.	Two segments Nov-15 & Nov-16 Jan-24 & Jan-25	 9am-12:30pm 9am-12:30pm	 Live Webinar Live Webinar
Advanced Excel Data Magic, Including Advanced PivotTables & Power Pivot – Acquiring, Analyzing & Visualizing Your Data Leave those manual reporting processes behind and move into the new world of automatically linking data into Excel for analyzing, reporting, and preparing visualizations. Using tools such as Power Query and Power Pivot, you can leverage your existing knowledge of PivotTables to do even more when it comes to summarizing, analyzing, and reporting potentially very large volumes of data. If you currently use PivotTables on a regular basis, take advantage of the powerful advanced reporting features available in Excel.	Two segments Nov-29 & Nov-30	 9am-12:30pm	 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.	Nov-08 Mar-07	9am-5pm 9am-5pm	Live Webinar Live Webinar

Budgeting and Forecasting Tools and Techniques Are your budgeting and forecasting processes working for you as well as they should? Learn how to achieve a greater return on your budgeting and forecasting activities by taking advantage of various tools and techniques available in today's market. In addition to learning about how to utilize Excel more effectively for budgeting and forecasting activities, you will also learn about other tools, and how reducing your dependency on Excel can lead to better results.	Two segments Oct-25 & Oct-26	9am-12:30pm	Live Webinar
Business Intelligence, Featuring Microsoft's Power BI Tools In today's business climate, business intelligence (BI) is perhaps the hottest topic in most professional circles. Learn how to implement "do it yourself business intelligence" using a variety of techniques and tools, work with some of the advanced data query and summarization features in Excel to create Excel-based dashboards, and leverage that knowledge to build even more powerful BI objects using Microsoft's Power BI tools.	Two segments Nov-24 & Nov-25	9am-12:30pm	Live Webinar
Creating Financial Statements in Excel Power Pivot In this course we will explore the data structure and measures required to build financial statements using the DAX formula language. We will start by reviewing the required Chart of Account setup and follow this with key DAX patterns for creating Profit and Loss, Balance Sheet, Statement of Cash Flow, and Expected Actuals statements.	Feb-03	9am-5pm	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.	Nov-01 Nov-16	9am-5pm 9am-5pm	**In-person, Vancouver** Live Webinar

ACCOUNTING & ASSURANCE
Audit & Assurance
Financial Reporting
Management Accounting
ETHICS
FINANCE & ECONOMICS
Business Valuations
Corporate Finance
Financial Modelling
PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT
Communication & Negotiation
Creative Thinking & Decision-Making
Self-Management & Wellness
Teamwork & Leadership
Resilient & Advanced Resilient Leadership Certificate Program
PUBLIC PRACTICE MANAGEMENT
STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE
Risk Management & Fraud
Strategy, Governance & Human Resource
Strategic & Advanced Strategic Management Certificate Programs
TAXATION
Commodity Tax
Corporate & Personal Tax
Not-For-Profit Organizations
Trusts & Estates
TECHNOLOGY & INNOVATION
Business Transformation & Emerging Issues
Software & Tools
WEALTH MANAGEMENT
PD NEXUS DAYS

DAX Formulas for Power Pivot 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-16	9am-5pm	Live Webinar
NEW **Everything Google! Their Most Effective Tools, Apps, and Services** Most users are familiar with Google's search service or Gmail but are unaware of the other services they provide. Explore the most valuable features, apps, and services of Google that the busy working professional could better utilize. Learn how to find better web results using search operators and tools, understand Workspace, learn how to create business documents using Google tools, back-up and sync electronic documents to the Cloud using Google Drive, and how to grow business and expand marketing using Google's marketing and website tools.	Jan-23	9am-12:30pm	Live Webinar
Excel 1: Core Data Analysis This hands-on course is an intensive program that will transform participants into Excel "power users." The course is focused on the pertinent Excel tools that are required in a business environment to efficiently analyze and manipulate data and to create compelling financial analyses. Participants will also learn numerous tips, tricks, and keyboard shortcuts to increase efficiency. Assignments, handouts, and examples will be used throughout the day.	Oct-20	9am-5pm	Live Webinar
Excel 3: Dynamic Dashboards This course provides practical tips and hands-on application to a variety of data management, charting, and formatting skills in an Excel environment. Participants will build a series of charts in order to create a dashboard. A variety of chart types will be explored. Automating titles, creating informative labels and text boxes, and learning best practices for dashboard design and construction will be covered.	Nov-22	9am-5pm	Live Webinar

Seminar Schedule
PD Passports
Nexus Days
Executive Programs
Certificate Programs

Excel 365: Advanced Data Analysis Excel 365 recently introduced new features which are the biggest changes to Excel's core functionality in decades. This hands-on course is an intensive session that will teach participants to use new features in Excel 365 to complete analytical work more efficiently and accurately. Participants will also learn how this new functionality can replace or supplement older methods of analysis in Excel. Assignments, handouts, and examples will be used throughout the day.	Nov-08 Mar-23	9am-12:30pm 9am-12:30pm	Live Webinar 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. In addition to long-standing features in Excel, this seminar will highlight the number of recent improvements to Excel including additions to the function library, tables, a vastly improved charting engine, and an overhaul of PivotTable functionality.	Four segments Nov-22, Nov-23, Nov-29 & Nov-30	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.	Dec-06 Dec-12 Feb-23	9am-5pm 9am-5pm 9am-5pm	**In-person, Vancouver** Live Webinar Live Webinar
Excel PivotTables for Accountants Learn how to build PivotTables, how to group data inside PivotTables, and create user-defined calculations in your PivotTables. Discover advanced techniques, including how to build PivotTables that consolidate data from multiple data ranges, and PivotTables dynamically connected to external databases and financial accounting systems. Learn how to take advantage of other Excel features associated with PivotTables.	Two segments Nov-01 & Nov-02	9am-12:30pm	Live Webinar

Excel: Specific Skills for Budgeting, Planning, and 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.	Nov-03 Mar-09	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.	Dec-08 Mar-16	9am-5pm 9am-5pm	Live Webinar Live Webinar
Getting Started with Excel Power Pivot Linking data from multiple sources, while powerful, only scratches the surface of the impact that Power Pivot is making in the business intelligence (BI) landscape. Learn the right way to use Power Pivot in this hands-on course developed by a CPA and business intelligence expert with real-world experience.	Nov-18	9am-5pm	Live Webinar
Google Business Tools for Accountants Attend this course to obtain a concise overview of Google's more than 200 online enterprise tools. These include services that can be used by accountants for communication, publishing, mobile connectivity, advertising, entrepreneurship, and other core business functions.	Nov-15	9am-5pm	Live Webinar

» **READ** instructor Garrett Wasny's article on how CPAs can upgrade their digital skills to stay competitive or listen to his podcast episode.

Google is Not Enough: The Best Search Tools You Aren't Using (But Should!) Attend this course to obtain a concise overview of leading non-Google search tools, and how they can be used by practitioners to sharpen their online intelligence gathering. Attendees will discover a whole new universe of search applications that can be used to discover prime information not found on Google.	Dec-13	9am-5pm	Live Webinar
Health Check for Your Financial Systems & Processes As businesses change and adapt to the new world realities, more pressure is placed on finance and accounting to lower costs, while continuing to meet regulatory reporting requirements and delivering more information for the business to evaluate financial performance. Explore ways to evaluate if your financial systems are meeting you current and future needs and if you have the right resources and practices to manage the demands of your organization.	Oct-27 Feb-09	8:30am-10:30am 8:30am-10:30am	Live Webinar Live Webinar
Improving Productivity with Microsoft/Office 365 Cloud Applications Many Office 365/Microsoft 365 subscriptions include powerful cloud services for improving productivity. Foundational services, such as SharePoint Online, OneDrive for Business, and Exchange Online, join with other powerful tools such as Teams, Planner, Power Automate, Forms, and Power Apps to provide a productivity platform second to none. Learn about the "rest" of Office 365 and how these cloud-based applications can enhance personal and team productivity, while simultaneously facilitating remote working arrangements.	Dec-06	9am-12:30pm	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. More specifically, you will learn how to use Excel's Macro Recorder to write simple yet effective macros; how to secure and share macros with other Excel users; how to create user-defined functions to solve specific accountant-centric problems in Excel; and how to create macros that run automatically when a user opens a workbook.	Dec-13	9am-12:30pm	Live Webinar
Intro-Mediate Excel Techniques Did you know that there are almost always three ways to do everything in Excel? Are you using the most efficient method possible to get things done? This "intro-mediate" Excel course is designed to quickly review the basics, giving you a solid review of techniques that you should know to be efficient, but may have missed in your own education. Once the basics are covered, we'll also jump into more advanced tools and techniques that you'll be able to take back to your daily work.	Feb-07	9am-5pm	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-17	9am-5pm	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-02 Nov-04	9am-5pm 9am-5pm	**In-person, Vancouver** Live Webinar

ACCOUNTING & ASSURANCE
Audit & Assurance
Financial Reporting
Management Accounting
ETHICS
FINANCE & ECONOMICS
Business Valuations
Corporate Finance
Financial Modelling
PEOPLE MANAGEMENT & PERSONAL DEVELOPMENT
Communication & Negotiation
Creative Thinking & Decision-Making
Self-Management & Wellness
Teamwork & Leadership
Resilient & Advanced Resilient Leadership Certificate Program
PUBLIC PRACTICE MANAGEMENT
STRATEGY, GOVERNANCE, RISK & HUMAN RESOURCE
Risk Management & Fraud
Strategy, Governance & Human Resource
Strategic & Advanced Strategic Management Certificate Programs
TAXATION
Commodity Tax
Corporate & Personal Tax
Not-For-Profit Organizations
Trusts & Estates
TECHNOLOGY & INNOVATION
Business Transformation & Emerging Issues
Software & Tools
WEALTH MANAGEMENT
PD NEXUS DAYS

Top PDF Features You Should Know Stop struggling with PDFs! Learn how to use tools and features to their fullest, such as PDF forms, redaction, converting PDFs to Word and Excel files, electronic signatures, creating and applying tick marks, building indices and catalogs, portfolios, and securing PDF documents, in order to work more effectively and efficiently with PDF documents.	Nov-14	9am-12:30pm	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 segments Dec-13 & Dec-14	9am-5pm	Live Webinar

» **DIDN'T FIND A SEMINAR?** Other Software & Tools titles may be available on-demand.

Seminar Schedule
PD Passports
Nexus Days
Executive Programs
Certificate Programs

WEALTH MANAGEMENT

A Six Point Plan for Financial Freedom	Nov-29	9am-5pm	Live Webinar
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.	Feb-16 *Available Online On-demand*	9am-5pm	Live Webinar

» **INSTRUCTOR** Read more about instructor David Trahair on page 9.

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.	Two segments Oct-25 & Oct-26	9am-12:30pm	Live Webinar
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.	Dec-15 *Available Online On-demand*	9am-12:30pm	Live Webinar
Financial Planning for 30-to-40-Year-Olds For young professionals today, most major life decisions and events often happen between the age of 27 and 35. The course will help you prepare for decisions related to all of the financial issues and strategies typically associated with the first phase of your post-school life. And as you outgrow the advice of parents, this course will prepare you to make independent financial decisions confidently.	Nov-09	9am-12:30pm	Live Webinar

How to Build an Investment Portfolio and Select Investment Products This is an introductory course for individuals looking to learn the basics in a very thorough way. It is a fast-paced session with informative and direct commentary on today's investment landscape in Canada that will teach you a six-step approach to investment portfolio management.	Two segments Nov-22 & Nov-23	9am-12:30pm	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.	Two segments Nov-16 & Nov-17	9am-12:30pm	Live Webinar
Money, Love and the Law In a new social reality our clients are not just divorcing, but re-partnering again – often with the same disastrous financial (and emotional) results! Attend this session to explore legal constructs under the Family Law Act. Explore spousal relationships, co-habitation, and marriage in light of their financial and legal implications.	Nov-08	9am-12:30pm	**In-person, Vancouver**
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-27 *Available Online On-demand*	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.	Dec-13 *Available Online On-demand*	9am-5pm	Live Webinar
The Psychology of Investing Recent research has proven that emotions and behavioural biases, both conscious and unconscious, are more at work than ever imagined. In this engaging and dynamic workshop we will address the empirical findings on investor behaviour and dig deeper into the thought processes at work in our own investing and financial lives.	Dec-06	9am-12:30pm	**In-person, Vancouver**
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-15 Mar-09 *Available Online On-demand*	9am-5pm 9am-5pm	Live Webinar Live Webinar

» **DIDN'T FIND A SEMINAR?** Other Wealth Management titles may be available on-demand.

PD NEXUS DAYS

Business and Leadership Insights Join us at this conference-style event is designed to bring you new ideas and perspectives on a wide variety of timely, relevant topics for today's business leaders. Plenary sessions will address the emerging imperative for ESG reporting for businesses of all sizes, as well as the intriguing exploration of ethics and data. In addition, two streams of breakout sessions will address innovations in technology, cybersecurity, business models, and how to adapt to meet the changing expectations of staff n a tight labour market.	Dec-07	8:30am-4:30pm	**In-person, Vancouver**
Public Practice Insights Come join your practitioner colleagues at this annual conference designed to address the challenges facing CPAs in public practice. With breakout streams on technical topics on tax and Handbook standards that will impact your practice, a plenary session answering the question, "What gets accountants into trouble?" and a session on how to train your brain to better cope with stress, you will leave this day with the new knowledge and skills you need to thrive in public practice!	Nov-22	8:30am-4:30pm	Live Webinar

» **READ MORE** About our Fall Nexus Days offerings on page 94.

Seminar Schedule
PD Passports
Nexus Days
Executive Programs
Certificate Programs

PD PASSPORTS 2022-23

Your most economical, cost effective and convenient savings program

Bulk Savings

The more you learn, the more you save

Early Bird Discount

Purchase by **September 15, 2022**

Special Discount

Additional 10% discount for this year

PASSPORT DAYS → PASSPORT CREDITS = MORE FLEXIBILITY

EXCLUSIVE DISCOUNTING FOR 2022-2023 PASSPORT SEASON

POTENTIAL SAVINGS: 20-40% OFF SEMINAR PRICES

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

Recognizing the challenges that many individuals and industries continue to face during this year of rebuilding, PD Passports will continue to be specially discounted by 10%.

EARLY BIRD DISCOUNT
Sep 15
2022
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

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 for Fall 2022

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.

CPABC
Nexus Days

PD NEXUS DAYS FALL 2022

Public Practice INSIGHTS — Strength Beyond Numbers

November 22, 2022 (Live Virtual)
PD Passport Valid: 12 Credits | $380

Public practice is demanding. Success requires an ever-expanding skillset and the ability to simultaneously juggle the needs of yourself, your staff and your clients. Come join your practitioner colleagues at this annual conference designed specifically to address the challenges facing CPAs in public practice. With breakout streams on technical topics on tax and Handbook standards that will impact your practice, and plenary sessions on "What gets accountants into trouble?" and how to train your brain to thrive and cope better with stress, you will leave this day with the new knowledge and skills you need to thrive in public practice.

We're keeping this Nexus day virtual to maximize accessibility for practitioners of all sizes and in all parts of the province. As always, there will be plenty of opportunities to share ideas and be inspired by your peers and knowledgeable presenters.

» **PRICING** Already reflects discount

CPABC
Nexus Days

PD NEXUS DAYS FALL 2022

Business & Innovation INSIGHTS — Moving Forward

December 7, 2022 (In-Person)
PD Passport Valid: 12 Credits | $380

Innovation is at the heart of business and organizational success, particularly as our businesses continually adapt to constantly evolving economic and social realities and expectations. This conference-style event is designed to bring you new ideas and perspectives on a wide variety of timely, relevant topics for today's business leaders. Plenary sessions will address the emerging imperative for ESG reporting for businesses of all sizes as well as an intriguing exploration of ethics and data. In addition, two streams of breakout sessions will address innovations in technology, cybersecurity, business models and how to adapt to meet the changing expectations of staff in this tight labour market.

We're excited to return to an in-person event for this Nexus Day to allow you to network with your peers and learn from inspiring speakers face to face.

» **PRICING** Already reflects discount

CPABC
Nexus Days

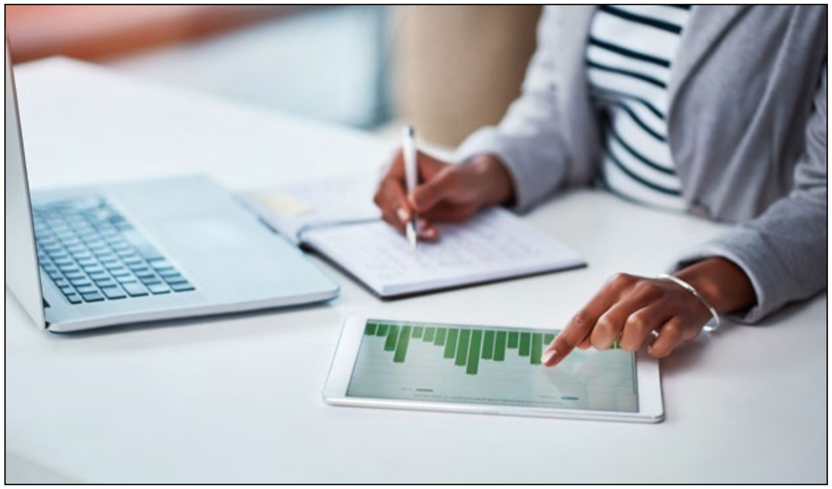
EXECUTIVE PROGRAMS

Building Your Expertise

Deepen and broaden your perspectives and knowledge with CPABC's 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.

Objective As a controller, you are expected to be the financial expert in your organization. You are relied upon to produce, analyze, and interpret the financial data that will be used by the executive team to make key financial decisions. To excel, you must continuously demonstrate leading-edge knowledge and keen business acumen.

September 21-24
In-person, The Parkside Hotel & Spa, Victoria

December 7-10
To be announced

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

Objective As a controller, you not only provide financial expertise in your organization, you provide leadership as a key member of the management team. Building on the foundation of your technical skills, your management and leadership skills will take you and your organization to the next level.

September 25-28
In-person, Vancouver

CFO Program

Geared towards aspiring and new CFOs.

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

Objective Reporting to the CEO or president, the chief financial officer is the top job that leads, initiates, and manages the financial decision-making process within the organization.

In addition to being a senior advisor to the CEO and the board, the CFO has other roles: business partner, scorekeeper, commentator, expert, and custodian.

These multiple functions mean that the CFO has to see both the forest and the trees, needs to understand the business and its numbers, as well as lead, develop, and help execute the business strategy.

October 23-26
In-person, Westin Whistler, Whistler

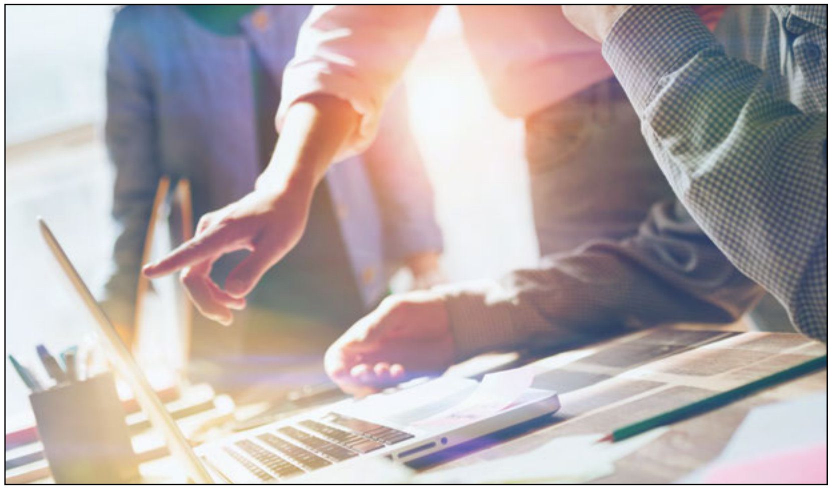
The CFO's Leadership Program focuses on developing the skills needed to be an influential leader in your organization.

Objective The role of the chief financial officer continues to evolve. Beyond technical expertise, today's CFOs need to make strategic financial decisions in a changing dynamic environment. This necessitates inspired, authentic leaders capable of solving challenging problems as a valued member of the c-suite. From supporting strategic decision making through to strong financial stewardship, there is a need for the CFO to demonstrate expertise in a broad range of areas, including regulation, globalisation, technology, risk, transformation, stakeholder management, reporting, and talent management. In short, they need to be truly effective leaders.

November 16-19
In-person, Whistler

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.

Objective CFOs are under pressure and COVID has not made it any easier, every CFO is hearing call from the corporate boardroom to "step out and go beyond the box". Long gone are the days when the CFO was primarily focused on the traditional box of command and control, and Monthly/Quarterly/Annual (M/Q/A) financial and management reporting.

October 19-22
In-person, Vancouver

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.

Objective This proven, mini "executive MBA" program has been offered to hundreds of senior members of the accounting profession across the country for well over a decade. It is designed for both current and aspiring leaders seeking to excel with confidence in the upper echelons of executive responsibility. The testimonials from prior attendees are all you need to read to understand the benefits of "going back to school" to contend with the increasingly unpredictable demands of an ambiguous, volatile, disruptive, complex business environment.

Watch for 2023 dates soon

Enterprise Risk Management Fundamentals

Geared towards financial professionals seeking knowledge in risk management.

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.

Objective In our increasingly complex environment, it is critical that finance professionals understand and embrace risk management as a key discipline. This three-day, six module program has been designed to help finance leaders prepare for, and quickly react to evolving business threats and opportunities. By understanding and properly managing risk, businesses can thrive, create value, and achieve a competitive advantage.

November 7-9
Online Virtual

Smart Leaders 2024

Geared towards leaders in positions of executive responsibility.

Smart Leaders 2024 is a stand-alone program for leaders seeking to liberate their genius, to change the way they think, and to strengthen their capabilities as decision makers, risk-takers and innovators to meet the demands of an increasingly volatile and complex business environment.

Objective Organizations live or die on their leaders' ability to solve problems. This unique, provocative, time-tested learning experience has been offered to hundreds of executives across the country for over two decades. It's re-engineered yearly to keep up with the incessantly unpredictable challenges they must confront. The testimonials from prior attendees are all you need to read to understand the benefits of "going back to school" to deal with the demands of an increasingly ambiguous, volatile, complex business environment.

November 1-3, 15-17
Online virtual

Leading with Emotional Intelligence

Geared towards leaders seeking a people-focused approach to your leadership style.

Leading with Emotional Intelligence is a comprehensive stand-alone program for professionals to learn, practice, and implement specific tools and tactics to build their leadership skills in emotional intelligence.

Objective The Leading with Emotional Intelligence Executive Program offers a comprehensive learning experience for professionals to learn, practice, and implement specific tools and tactics to build their leadership skills in emotional intelligence. Attendees will walk away with a deeper understanding of their soft skills and those of their peers, which ultimately impacts and improves their self-perception, communication, teamwork, decision-making, and stress management skills..

October 13-14, 18-19
Online virtual

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**

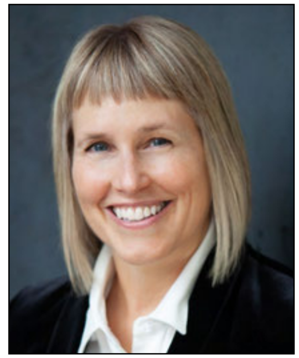
Faculty

DR. VIJAY JOG is the founder of Corporate Renaissance Group (a Quisitive Company), 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. She specializes in helping business owners identify and execute their strategic objectives, build strong teams, and achieve operational excellence. Additionally, she provides leadership training to management teams across all industries to develop confident, dynamic, and collaborative leaders of tomorrow.

LINDA CO-FACILITATES
The Controller's Management Program

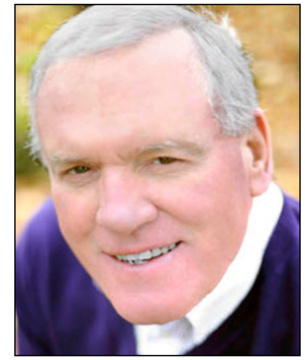


MIA MAKI, BA, MBA, FCPA, FCMA, is a principal of a consulting firm and a professor with the University of Victoria Gustavson School of Business, with over 25 years of teaching experience. She has worked in finance and accounting since 1986 and has experience in a wide variety of industries, including 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



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". Read his full bio on *SmartLeaders.ca*.

JIM FACILITATES
The CEO Program
Smart Leaders 2024

Faculty

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

CAROLYN STERN, B.COMM, B.ED, PBD PRED, PBD In Bus, MA Leadership As a professor with the School of Business at Capilano University, Carolyn pioneered the integration of Emotional Intelligence into Capilano's curriculum. An Emotional Intelligence and leadership development expert, Carolyn combines real-world experience as both a business leader with more than two decades as a trainer and educator. Her company, EI Experience, provides leadership development and emotional intelligence training for all management levels and businesses of all sizes and scope. Since launching EI Experience in 2017, Carolyn has helped more than 15,000 business leaders leverage their emotional intelligence skills to connect with their diverse workforce and develop high-performing teams.

CAROLYN FACILITATES
The Leading with Emotional Intelligence Program

TAMMY TOWILL, MBA, FCPA, FCMA is a partner in the Cordura Group and Chair of the School of Business for 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 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, Atlantic Credit Union, Hillfield-Strathallan College, Canadian Stewardship Services Alliance, Ministry of Environment Canada - Great Lakes Region, and the Ktunaxa First Nations. He is the author of a Management Accounting Guideline for CPA Canada – A Practical Approach for Managing Risks in Small- and Medium-Size Organizations.

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....

NEW Virtual Presentation Design and Delivery

For the foreseeable future, delivering virtual presentations to internal and external audiences will be a critical professional skill. Many high stakes, virtual presentations currently fall short of the necessary purpose, engagement, and professionalism needed to be effective.

This six-module certificate program will demonstrate to your organization, clients, potential employers, and other key stakeholders that you can design and deliver engaging and effective professional virtual presentations.

The six modules are:

- Module 1 – Virtual Presentation Basics
- Module 2 – Technical Requirements for Virtual Presentations
- Module 3 – Instructional Design for Virtual Presentations: Part 1
- Module 4 - Instructional Design for Virtual Presentations: Part 2
- Module 5 - Virtual Presentation Delivery Skills: Part 1
- Module 6 - Virtual Presentation Delivery Skills: Part 2

Why take this program?

It is not enough to take an existing prepared live presentation and do the same thing in a virtual setting. Current research shows that this will result in a lack of clarity and engagement with your message. Designing and delivering virtual presentations requires specific knowledge and skills to achieve the presentation's purpose.

Who is this program designed for?

Professionals who want the tools and confidence to design and deliver virtual presentations that are clear, purposeful, and engaging.

NEW CPA Firm Manager Leadership Skills

Are you a new manager at a CPA Firm? Would you like to effectively lead your team? Do you need to refine your business development or project management skills? What about problem solving or decision making? These are all important skills as a manager and a leader especially at a CPA Firm in BC.

This eight-module leadership skills certificate program focuses on refining the necessary skills to lead your team effectively to success.

The eight modules are:

- Module 1: Leading Teams in a Hybrid Work Environment
- Module 2: Project Management Tools and Techniques
- Module 3: Managing your Managers and Partners
- Module 4: Providing Effective Feedback to your Staff
- Module 5: Business Development and Networking
- Module 6: Creative Problem Solving
- Module 7: Time Management Tools
- Module 8: Professional Ethics for Managers

Why take this program?

By completing this program, participants will enhance their competencies in the following areas: communicating with staff and partners, managing self, collaborating and leading, solving problems, and acting ethically and demonstrating professional values..

Who is this program designed for?

Professionals working in a CPA firm that are recent to the manager level position of the firm.

GARTH SHERIFF, CPA, CA, CIA is the founder of Sheriff Consulting, specializing in delivering professional and leadership skills webinars and online courses. Sheriff Consulting's mission is to create a learning environment that is both engaging and impactful to your professional development. Garth has also worked as a professional actor and is a member of the Alliance of Canadian Cinema, Television and Radio Artists.

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.

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.

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.

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.

NEW Advanced Resilient Leadership

A Culture Blueprint for Changing Times

The four-part Advanced Resilient Leadership Certificate modules are:

- From Toxic to Terrific…Change Your Team for the Better!
- Brave Spaces and a Curious Mindset…Amp up the Learning
- From Success to Significance: Make Work Meaningful
- From Languishing to Flourishing: How to get Happy at Work

Each module can be taken as a stand-alone course, and modules will build on each other. However, in order to qualify for the Advanced Resilient Leadership Certificate, participants are required to complete all four modules. The Resilient Leadership Certificate is not a pre-requisite to this Advanced program.

Why take this program?

Toxic workplace cultures are well-defined and ravaged workers are leaving in pursuit of better places to work. Would you like to make your culture the place everybody wants to join? Are you willing to run some experiments to improve your culture? Building a team has never been harder than it is right now, but every person's actions counts. You also do not need to be a formal leader with a fancy title to have a profound impact because change happens one person or moment at a time. Culture is always changing and evolving. Our job is to continually adapt, respond, learn, adjust, and keep going.

Who is this program designed for?

This program is an integrated set of reflections, and practical, applicable exercises for anyone interested in creating a culture where people can thrive and do their best work. If you want to get playful and learn some new ideas to invigorate energy and build more humane places to gather this series is for you. Each course "Starts at Start", and offers at least 10 useable ideas you can start using today.

» **SAVE MORE** In each of these resilient leadership programs, register for all modules for a reduced price.

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.

Seminar Schedule
PD Passports
Nexus Days
Executive Programs
Certificate Programs

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.

BLI OFFERINGS

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

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.

CPA Crossings OFFERINGS

ED4S

ED4S is a mission driven, impact first, for profit organization based in Montreal, offering online courses designed for enterprises and sustainability self-starters. Their mission is to empower individuals and companies to have a holistic way of looking at issues and opportunities and allowing them to make more integrated decisions to build more sustainable economies and societies.

ED4S OFFERINGS

EI Experience

EI Experience is a corporate training company specializing in emotional intelligence, known for developing exceptional leaders who, in turn, achieve outstanding results through unparalleled innovation, solid fiscal performance, and extraordinary teamwork. Their courses allow participants to go on their emotional intelligence leadership journey at their own pace through an experiential, skills-based online experience that ensures participants can learn, practice, and apply what they learn to their jobs immediately.

EI Experience OFFERINGS

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.

Executive Finance OFFERINGS

Garrett Wasny

Garrett Wasny, MA, CMC, CITP/FIBP is an independent digital skills advisor to accountants worldwide. His archived webinars focus on the intersection of accounting and technology, and provide guidance to practitioners on how to prosper in this dynamic age. The sessions demystify emerging cloud, mobile, and social applications, and explain in plain language how financial professionals can use these online tools to build trust, solve problems, and create new value. The presentations reveal how practitioners can build on their core knowledge as financial stewards and develop new digital competencies as strategic advisors, cross-domain thinkers, and integrated reporters.

Garrett Wasny OFFERINGS

FlipU

What if online learning was even better than in-person? At FliP University, we've taken the best of in-person workshops and put it online. Our content is "pracademic" (that is practical + academic), whimsical, transformative, and thoroughly modern, at the forefront of organizational needs. It is based on research from cognitive neuroscience, creativity, social, organizational and positive psychology, learning theory, and clinical practice.

FlipU OFFERINGS

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

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

Parametric Pro Consulting

Parametric Pro Consulting is a full-service consultancy specializing in strategy, finance, and real estate. Based in Victoria, BC, the firm has served a range of local, national, and international clients, including for-profit and not-for-profit organizations, crown corporations, municipalities, developers, and realtors. Shaped by partners' decades of real-world experience, Parametric Pro Consulting delivers professional development education through on-demand courses, workshops, and seminars, with a particular focus on management consulting, strategic advisory, and commercial real estate. Their educational content supports learners with a range of expertise, from entry-level to senior-level business professionals.

Parametric Pro 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.

Pro Dio OFFERINGS

Sheriff Consulting

Sheriff Consulting specializes in the design and delivery of professional and leadership skills courses for accounting and finance professionals. Sheriff Consulting's mission is to provide an engaging approach to your continuing professional development. Their online content is designed for maximum engagement using the latest developments in adult learning pedagogy and current research in technical, professional, and leadership skills.

Sheriff OFFERINGS

UltimQuest Knowledge

UltimQuest Knowledge aims to improve organizational performance by delivering practical "how-to" corporate training on a variety of topics relevant to CPAs. Through live and online training, they provide courses in business ethics, governance, internal control, key performance indicators, leadership, and more. Their instructors are highly rated Canadian CPAs whose courses are designed to share their years of knowledge, experience, and business acumen through step-by-step guidance, personal experiences, and real-life examples. Their objective is to empower CPAs with useful insights to boost their career, and to help them become change-makers in their own organizations.

UltimQuest Knowledge OFFERINGS

CPABC 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 a purely 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-to-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

CPABC PD Archived Webinars

CPABC PD Archived Webinars are direct video recordings from live PD seminars delivered over Zoom, along with the corresponding course materials. These are typically shoter-length webinars compared to our PD Video On-Demand line. Note that this is a purely 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-to-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 AudioWeb OFFERINGS

IN-HOUSE PRESENTATION SERVICES

Making Corporate Training Happen

We realize that members work in diverse roles and industries, and that seminars tailored and relevant to you are sometimes difficult to locate. Let us provide you with that customization solution. We offer seminars in various topics, and our instructors can work with you to customize the seminars, focusing on your specific needs. Courses can be offered either in-person or via Zoom.

Benefits of Personalized Training

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.

Contact us at **pdreg@bccpa.ca** for more information.

IN-HOUSE PRESENTATION SERVICES

Between June 2021 and June 2022, we successfully provided virtual courses for our in-house clients in a safe and convenient environment

80+
sessions offered

2,300+
participants from 31 organizations (industry & public practice)

4.3/5.0
average course rating

300+
seminar titles to select from

Testimonials

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

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

"The Corporate Services Team at the City of Kamloops is a multi-focused group supporting the needs of the organization in the areas of risk management, finance, legislative services, procurement and technology. Finding professional development opportunities, along with a chance to create team-building opportunities can be challenging. The PD In-House Program offered by CPABC created an opportunity for our team to have a unique professional development opportunity and helped to strengthen the dynamics of the team. This is definitely a program we will be keeping on our radar for future development opportunities."

Dave Hallinan FCPA, FCMA
Planning and Procurement Manager, City of Kamloops

"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

CPABC PD Seminars via Zoom Conferencing

Frequently Encountered Issues

In most of these scenarios, solutions will be dependant on your specific device and the operating system that device is running. Troubleshooting issues can take some time to resolve, so we *strongly* encourage you to test out Zoom with your device ahead of time.

My video/camera isn't working.

In some cases, your device may have a privacy or permissions feature that prevents Zoom from accessing your camera. Check your settings and allow Zoom permission to access your camera.

» FURTHER READING Zoom article on video/camera troubleshooting; Windows 10 privacy feature; Using Zoom with Mac OS

I can't hear the instructor.

Did you click on **Join With Computer Audio** when you first joined the meeting? If not, and if that setting is not already your default, click on the arrow next to the microphone icon on the bottom left corner of the meeting screen to select that option. You may also need to check your permissions and allow Zoom access to your microphone. If you are using iOS or Android, tap on the headphones icon at the bottom left corner, and select either **Call using internet audio** (iOS) or **Call over internet** (Android). It's also possible that the volume control on your device had previously been turned off or lowered.

I keep hearing an echo.

Are you using multiple devices to participate in the Zoom course? Make sure only one of those devices has audio turned on.

» FURTHER READING Zoom article on audio echo in a meeting.

I can't see polling questions.

If you are using the Zoom Desktop Client, ensure you have downloaded the most up-to-date version. Previously, polling also did not work when the web browser version of Zoom was used – this issue has been resolved by Zoom.

» FURTHER READING Zoom article on keeping up to date and how to update your Zoom client.

I want to dial in instead of using computer audio – how do I do this?

When you first join the meeting you may notice a pop-up window with audio conference options. Click on the Phone Call tab to see the list of dial options (toll-free number included). If you do not initially see this pop-up, click on the arrow next to the microphone icon on the bottom left corner, and select Switch to Phone Audio and you will get the pop-up window with dial options. Visit our website to watch a quick video tutorial on how to use some Zoom features.

How to Use Zoom Features

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. Participate by typing comments and questions 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. Ensure you have access to your online account prior to the day of the webinar to ensure there is enough time to troubleshoot any login issues.
4. Join the webinar a few minutes ahead of the scheduled start time. A brief introduction on logistics and attendance will be provided promptly at the start.
5. If you experience lagging video/audio, close other unnecessary programs, check your internet connection, or try logging out and rejoining the session.
6. Use Zoom shortcuts to easily mute/unmute your mic, or turn your camera on/off.
7. Use the Zoom Reaction feature for non-verbal communication to increase interactivity.

Paperless Seminar Materials & Online Services

Frequently Asked Questions

What are the benefits of paperless seminar materials?

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. While a print option was previously available for select seminars, this option has been discontinued in light of COVID-19 to reduce the number of touchpoints.

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 on CPABC's new Learning Management System – the MyLearn platform. Login to your CPABC Online Services account, go to the Professional Development tab (green bar at the top) then Your Seminars and Materials (menu on the right). In the Upcoming Seminars tab, navigate to your course, then click on "Access your course/material on the MyLearn platform". This will launch your learner page on MyLearn, where you can click on the relevant course, and download PDF materials.

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

You will have access to the course materials two business days prior to the seminar start date and for up to 30 days after the seminar date. Please download the materials to your own computer or device before the 30 days expire.

What type of files will I have to download?

In most cases, your paperless course materials will be in PDF format; some may contain Word and/or Excel files.

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

If you are able to download and read PDFs and other files onto your tablet or iPad, then you should be able to access course materials with those devices. However, certain features may not work as well, depending on which applications you are using. We do not recommend using a mobile phone to review course materials.

Can I edit or make notes on the electronic materials?

Our 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 our 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 ways, there is still an ongoing need for professional development. To help keep PD courses accessible, CPABC has continued 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 **March 31, 2023.** Some CPABC PD products may be excluded from this offer.

10% OFF

PD Passports

A 10% discount will be applied to all 2022-2023 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 credits that can be applied toward passport-eligible seminars.

» **WATCH** Visit our website for tips & videos

- How to Use Zoom Features
- How to Annotate on Paperless Material

Seminar Schedule
PD Passports
Nexus Days
Executive Programs
Certificate Programs

Registration & Payment

Confirmation of Registration

A confirmation of registration will be emailed to the registrant no later than one 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

CPABC will continue waiving our $25 and $50 cancellation fee on registrations to CPABC PD seminars held through to August 31, 2023. 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.

If a registrant falls ill, requiring them to cancel after 7:00AM two business days prior to the seminar date, accommodations may be made to provide access to attend a future offering of the same course (if available) at the earliest availability – the substituted course may be in-person or on-demand depending upon what is available at the time. Note that a $50 administrative fee will apply in such cases.

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.

E-Learning and Online On-Demand Seminars

The registration fees for e-learning/on-demand 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 e-learning/on-demand 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.

Note that by registering for CPABC PD seminars, webinars, programs, and on-demand learning, the registrant agrees to:

1, All Terms & Conditions specified here.

2. Have their name listed on class lists (not applicable to on-demand learning).

3. Have their personal information including learning activities associated with the course collected and recorded under the authority of the Freedom and Information and Protection of Privacy Act s.26 (c) and (e), for the purposes of facilitating the delivery of the course; tracking CPD hours and course progress; customizing and improving the user experience; and in accordance with CPABC's Privacy Statement. In order to provide the registrant with an optimal learning experience, the Chartered Professional Accountants of BC (CPABC) uses the "Docebo" learning management system. While CPABC has made arrangements for the registrant's personal information to be hosted by Docebo in Canada, Docebo may use sub-processors located outside of Canada with access to that personal information to assist in providing its services. By registering for this course, the registrant consents to such access. Should you have any questions about the collection, use or disclosure of your personal information, please contact: Learning Management System Administrator at CPABC, 800-555 Hastings Street, Vancouver, BC V6B 4N6 or 1.604.872.7222 or toll-free at 1.800.663.2677 or send an email to pdreg@bccpa.ca.

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