Dear Members:

Welcome to the Continuing Professional Development (CPD) 2016 spring brochure, featuring a number of informative, relevant and affordable options for you to grow and develop as a professional.

This brochure includes offerings of half, full and two-day sessions developed by the interprovincial Professional Learning and Development Programs Committee (PLDPC), entrepreneurial sessions, as well as new offerings.

Also included is a selection of live broadcast seminars that can be accessed anywhere that you have access to the internet. Participants watch the seminar leader deliver the seminar, and have the PowerPoint presentation on their screen at all times. They will receive access to the pdf file of the seminar materials prior to the seminar date. A live chat option allows online participants to submit questions, so you will always feel like you are part of the room, see Live Broadcast section of the brochure.

CPA Nova Scotia accepts event registrations on-line, due to the timing of the PD program the ICANS legacy registration system will be used while the new CPA Nova Scotia system is being developed. Members who are registering to take PD for the first time through this system are asked to please contact Danielle Roode at droode@cpans.ca to set-up a member record to allow you to register on-line.

To register on-line go to www.cpans.ca. On the professional development page click “Registration” and then “Click Here” to register or click the button below. The first time you login you will need to set-up your account; your username is your Chartered Professional Accountants of Canada (CPAC) member number. Initially, you will also need to set up your password by clicking on “Create/Reset My Password”. Please ensure you use the preferred email address that you use to receive emails from CPA NS. You will then receive an email prompting you to create your password. Once your password has been accepted, return to the login screen, enter your username and password you just created, you should now be logged in.

If you need assistance or have any questions regarding these processes, please contact Danielle Roode at 902.425.3291 ex. 231 or droode@cpans.ca.

CPA NS reminds you that our Personal and Organization Passports (see Registration Information and Conditions) are your most cost-effective payment alternative.

If you have any questions or concerns please feel free to contact me at (902) 425-3291 ext. 223 or email kslaunwhite@cpans.ca.

Thank you for utilizing the CPA NS PD programs and enjoy your learning experience!

Kathie Slaunwhite
Director, Professional Development

MEMBER ONLINE REGISTRATION
Register for CPD opportunities and events online
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<th>TUESDAY</th>
<th>WEDNESDAY</th>
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<tr>
<td><strong>16</strong> Tax Planning for Private Enterprises on Business Succession PD16171231</td>
<td><strong>17</strong> Purchase and Sale of a Business: Income, Tax &amp; Related Issues PD16171221</td>
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<td><strong>19-20</strong> Income Planning Tax Refresher – Corporate Tax Planning PD16171191</td>
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<td><strong>23</strong> Victoria Day</td>
<td><strong>24</strong> Financing Strategies PD16170031</td>
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<td><strong>31</strong> Write with Confidence for Professionals PD16171151</td>
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<td><strong>1</strong> Who You Are is How You Lead: Unleashing Leadership Excellence PD1617141</td>
<td><strong>2</strong> Get More Power from Your Brain PD16170161</td>
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<td><strong>6 - 7</strong> Controllership - A Partner for Business PD16170021</td>
<td><strong>8</strong> GST/HST Refresher for Professionals PD16171181</td>
<td><strong>9</strong> Catching Up: 5 Years of Income Tax Developments PD16171161</td>
<td><strong>10</strong></td>
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<td><strong>13 am</strong> Taxation of Employee Benefits PD16171251</td>
<td><strong>14 am</strong> Getting a Grip on RDTOH, CDA, and Other Tax Account PD16171171</td>
<td><strong>15</strong> Practical Tips for Controllers and CFOs PD16170111</td>
<td><strong>16 am</strong> Practical Financial Negotiation Tips PD16170051</td>
<td><strong>17 am</strong> Ten Practical Topics for Accountants in Leadership PD16170121</td>
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<td><strong>13 pm</strong> Employment Law A – Z PD16170151</td>
<td><strong>14 pm</strong> Income Taxation of Portfolio Investments for Individuals PD16171211</td>
<td><strong>15 pm</strong> Income Taxation of Portfolio Investments for Individuals PD16171211</td>
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<td><strong>20</strong> Strategic Relationship Skills for Influence PD16170181</td>
<td><strong>21</strong> Behind Boardroom Doors: Achieving Governance Advantage PD16170091</td>
<td><strong>22</strong> NFPOs &amp; Registered Charities - Accounting, Auditing &amp; Taxation Issues PD16170011</td>
<td><strong>23 am</strong> Managing Absenteeism in the Workplace PD16170131</td>
<td><strong>24 am</strong> Get Organized &amp; Take Control @ Work PD16170171</td>
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<tr>
<td><strong>27</strong> Time and Priority Management PD16171111</td>
<td><strong>28 am</strong> When Perfect is Not Good Enough PD16171131</td>
<td><strong>29</strong> Transforming Leadership, from the Inside Out PD16171121</td>
<td><strong>30</strong> Teach Your Team to Fish PD16170191</td>
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</table>
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<table>
<thead>
<tr>
<th>Course Code</th>
<th>Description</th>
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<tr>
<td>PD14150101</td>
<td>These numbers under the course title represent the Course number for registration purposes.</td>
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<tr>
<td># Passport Days</td>
<td>Value that counts against Passports, i.e. half, one or two days.</td>
</tr>
<tr>
<td># PD Hrs</td>
<td>Hours that will be recorded for CPD requirements in the database.</td>
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<tr>
<td>Member Pricing</td>
<td>Available to CPAs who are members of a Provincial Body.</td>
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Not valid for passport registration, but passport holders can claim a discount which counts as one passport day.

Indicates Passports cannot be used to register for these courses.

Comments From Previous Offerings:

Who You Are in How You Lead....
Material very interesting, working in groups very useful and enjoyable. Enjoyed having to reach out to participants outside working group. Very practical and applicable to my everyday work.

Get More Power from Your Brain
Very interesting. Helpful tips on remembering things; fun course. Key aspects I have used in my life and have used as discussions with family and friends. The entire course was appealing. Eileen was able to keep our attention all day, I very much enjoyed the discussion on long term short term memory. She was extremely knowledgeable about the brain and really got us all thinking in new and better ways.

Tax Returns - Corporate
Relevant to my group of companies that I am controller for. Good overall coverage of broad subject. Being an update, helps a “generalist” be aware of corporate matters.

Financing Strategies
I enjoyed the discussion and relevant input from attendees as well as Blair’s examples from his experience. Good overview of various kinds of financing available. Explored many differing alternatives and many of these were brought to life by real life examples provided by the instructor.

Excel Tips, Tricks & Techniques for Accountants
The vast capabilities of Excel that were shown was appealing. The information was useful, current, concise and relevant. We saw a variety of ways of accomplishing various functions in excel. If you walk away with only 1 trick/tip you didn’t know it will save you hours, and hours, and hours of time during your reporting year. This course had valuable take home information that will be useful every day. Teaches more tips for being more efficient and effective in using excel.

Purchase and Sale of a Business
Bobby was both knowledgeable and passionate. The review of the basics was good. It was very informative and the information in the binder is very useful.

Management Accounting Refresher
Good reminder of techniques to help evaluate. This is a good refresher.

Tax Planning for Private Enterprises on Business Succession
Useful resource. The course material will provide for a great reference point. Examples by instructor relevant to owners of businesses I work for given their ages.

Controllership - A Partner for Business
Group work appealed to me. The real life examples and group discussion were relevant and useful. Interesting, relevant, real-life experiences tied back to the subject matter, Blair’s a natural instructor / moderator. Blair was a very good facilitator.

NFPOs & Registered Charities – Accounting, Auditing & Taxation Issues
Good refresher of NPO issues. I like how the material provides us with a lot of information about all of the possible issues and topics surrounding NFPOs/Charities. The binder is also a great take-home resource. Having 2 presenters for such a lot of material provided a refreshing change, as they could tag team off each other.

Practical Tips for NFP Financial Leaders
Love this instructor. Never looked at my watch once. We missed break and I didn’t even notice! Lots of good tips for NPO. Some practical hints and tips were offered.

Strategic Relationship Skills for Influence
Instructor made everyone feel comfortable - enjoyed meeting lots of new people. Very interactive, real-life practical examples. I found the exercises to be extremely helpful and relevant and we had ample opportunity to interact with others and practice the material. I enjoyed the discussion on personality types and the various quadrants people fit into that affect how they relate with other. Interesting range of topics.

Practical Tips for Controllers and CFOs
Instructor was very interesting and had a lot of interesting experiences that were useful in my career. There were lots of tips discussed that are good take-aways. Relevant, real life examples. Practical examples. Topical areas covered, very good to take away to provide clients with info. Good instructor, very knowledgeable.
Pricing Information

Course Fees

Course fees may be paid by cash, money order, cheque (Due to timing, the ICANS legacy system will be used to process payments. Cheques should be payable to the Institute of Chartered Accountants of Nova Scotia [ICANS]), VISA or Master Card, see Registration Information & Conditions Section for more information. Listed below is the pricing for Passport Valid PD seminars, unless otherwise indicated on the course description:

<table>
<thead>
<tr>
<th>Type/length</th>
<th>Member fee</th>
<th>Non-member fee</th>
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<tbody>
<tr>
<td>½ Day</td>
<td>$200</td>
<td>$240</td>
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<tr>
<td>1 Day</td>
<td>$350</td>
<td>$420</td>
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<td>2 Day</td>
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Price Reductions

Members who have qualified for a full or partial waiver of their membership dues, unless otherwise approved by the Director of Professional Development, shall be entitled up to a maximum of 21 hours in any calendar year of any Passport Valid PD seminar for an administrative fee of $25 (plus HST) per course/per day. Further, the administrative fee will be waived for a member who has received a full fee waiver due to a disability or financial hardship.

For further information, please contact Danielle Roode at CPA Nova Scotia at droode@cpans.ca or (902) 425-3291 Ext. 231.

Passports

PD Passports offer members and other professionals interested in taking multiple Passport valid classroom sessions throughout the year at tremendous savings. Individual Passports allow a member to receive over a 50% savings per session if taking advantage of the full five days of sessions, mixing half-days, full-days and two day passport valid sessions, but could also receive a saving of 28% if only registering for three days of PD in one year. Organization Passports work potentially on the same basis, the more sessions taken, the bigger the savings, but this passport has the versatility of multiple users from the same company or firm (see Registration Information & Conditions). PD Passports are valid from April 1st to March 31st the following year.

Member Passport holders can register for additional sessions in excess of the passport entitlement at the per session passport cost. The following table shows a breakdown of the Passport pricing:

<table>
<thead>
<tr>
<th>Passport type</th>
<th>Days</th>
<th>PD Passport fees</th>
<th>Additional per course fee</th>
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<td>Member</td>
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<td></td>
<td></td>
<td>Full</td>
</tr>
<tr>
<td>Individual</td>
<td>5 full/10 half</td>
<td>$760</td>
<td>$945</td>
</tr>
<tr>
<td>Organization</td>
<td>9 full/18 half</td>
<td>$2530</td>
<td>$2915</td>
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</table>

Some sessions are not passport eligible due to arrangements made by the presenters; when possible a reduction in the seminar fee has been offered to passport holders.
Registration Information & Conditions

General (All Registrations)

Cancellation of seminars by CPA NS
1. CPA Nova Scotia reserves the right to cancel seminars for low registration. Courses with insufficient enrolment two weeks prior to course date will be cancelled. Registrants will be advised and may enroll in alternative courses (subject to availability) or receive a full refund/course credit.

2. If a course is cancelled due to severe weather conditions notice will be via email by 7:00 am the morning of the session.

Please be advised in rare instances CPA NS may be forced to cancel a seminar on short notice due to circumstances outside our control. Best efforts to contact participants prior to the seminar start time are based on information provided by the participants (please provide an accurate email address where requested, as this is the best method of contacting individuals on short notice). CPA NS’s liability, if any, is limited to the seminar fees paid.

Refunds
No refund will be made for cancellations received after the Passport deadline date or 2 weeks prior to any other course date. Refunds for withdrawals before those dates will be subject to a handling charge of $30 plus HST per course.

Lunches
Lunches are not included in the price of a course. Participants of all course offerings are on their own for lunch.

Accommodations
Registrants are responsible for their own accommodation arrangements. For hotels offering corporate discounts, please go to www.icans.ns.ca (under member benefits).

Course material
All course material will be distributed at the course site (to the registered participants only), unless otherwise stated in the course description.

Please note, because of ownership, CPA NS cannot provide entrepreneurial materials (third party) to participants who do not attend a session.

Non-members
Registration is open to sufficiently qualified non-members and we encourage your participation.

Times
Please refer to course descriptions for course times. Check course outlines on the CPA NS website (www.cpans.ca under professional development tab) for the most recent changes.

Confirmations
Confirmation reports for course registrations are mailed approximately two weeks prior to the course date. For registrations received after this date, confirmation will be faxed or emailed. If you have not received a confirmation prior to the seminar date, please contact the office. Please note: confirmation is provided as a courtesy, it is not an integral part of the registration process. All assessments apply whether or not a registrant receives a confirmation letter.

Locations
PD courses will take place in the learning centre, 300-1871 Hollis St., Halifax. Seminar locations and dates are subject to change. Please see individual course descriptions in this brochure for locations of each course and check on-line for updated information.

CPA Nova Scotia is committed to making our professional development programs accessible to all members. All course facilities are wheelchair accessible and we will provide reasonable accommodation for participants with disabilities upon request. Please contact us at least one month prior to the course date to request accommodation.

Registration and course fees (payable to ICANS) should be mailed to:
Chartered Professional Accountants of Nova Scotia
300-1871 Hollis Street, Halifax, NS B3J 0C3

Or fax (credit card registrations only) to 902.423.4505

Please direct registration enquiries to Danielle Roode:
droode@cpans.ca | 902.425.3291 ext. 231

Please direct course enquiries to Kathie Slaunwhite:
kslaunwhite@cpans.ca | 902.425.3291 ext. 223
Non-Passport

Registrations
The deadline for registration is two weeks (14 days) prior to any course date. Registrations received from participants after those deadline dates will be subject to a $30 plus HST administration charge per course.

To register, complete and return the registration form together with a cheque or credit card information for the course (plus late filing fee if applicable) to The Institute of Chartered Accountants of Nova Scotia (ICANS). This should reach CPAN NS by business closing on the deadline date specified or two weeks prior to the seminar date.

Passport

Registration
Deadline for the purchase of Passports is May 11, 2016. To register, complete and return the Passport registration form together with your payment to the Institute Of Chartered Accountants Of Nova Scotia (ICANS). To attend any session, the PD Passport holder must register two weeks prior to any seminar deadline. Regular pricing applies for course registrations received after the deadline dates. Registrations are handled on a “first come, first serve” basis and some may fill up early.

Passport identification
CPA NS reserves the right to ask for picture identification.

Passport expiry
Valid for PD activities from April 1st to the following March 31st. Any unused portions of the PD Passport cannot be refunded, credited or carried-forward.

“No show”
No-shows are attendees who register through a Passport, but do not attend and do not notify CPA NS at least 5 full business days prior to the course date. No refund and/or credit, partial or full, will be given to “no-shows” and they will forfeit the portion of the PD Passport used to register for the seminar.

Additional courses
Any additional courses above the maximum allowance per Passport can be taken at a reduced rate (see Pricing Information) of $220 plus HST per full-day (not available for non-members) and $115 plus HST per half-day course (not available for non-members).

Refunds
No refund will be made for Passport cancellations received after the Passport deadline date. Refunds for withdrawals before that date will be subject to a handling charge of $30 plus HST per course.

All registrations must be accompanied with the registration fee. (Registrations without fees or via phone will not be processed.)

Substitutions
An alternate participant may attend, additional fees will be charged if replacement is not a member. This is the registrant’s responsibility and CPA NS must be advised of the change, at least 2 days, prior to course date.

Conditions

Individual PD Passport
• Member pricing: $760 plus HST for CPAs; Non Member: $945 plus HST (see Pricing Information).
• Attend up to 5 full-days of Passport valid courses. You cannot register for courses that are scheduled at the same time!
• No substitutions will be permitted. Individual PD Passports are non-transferable and Passport holders may need to provide ID at time of course.
• Passport is issued to an individual and not to a firm. CPA NS reserves the rights to the PD Passports. Inappropriate use will result in the immediate cancellation of privileges with no refunds.

Organization PD Passport
• Member pricing: $2,530 plus HST for CPAs $2,915 plus HST to include non-members (see Pricing Information).
• Organization participants may attend the equivalent of 9 full-day Passport valid courses.
• Non-member Organization Passports entitle an organization to register those eligible for member pricing and non-members for up to 9 full-days, additional offerings can be added to this Passport for CPAs only, at the reduced fees. If more than 9 days are required for non-members, either an additional Passport must be purchased or payment of full registration fees for the additional non-member registrations will apply.
• An organization can register any number of individuals eligible for member pricing for any given Passport valid course(s), but they must be employees of that organization. All persons included on an Organization Passport must be registered by the Passport deadline date; no additional participants can be added to an Organization Passport after the deadline date.
• CPA NS reserves the rights to the Organization Passports. Inappropriate use will result in the immediate cancellation of privileges with no refunds.
Course Listings

ACCOUNTING

NFPOs & Registered Charities - Accounting, Auditing & Taxation Issues
PD16170011 | Reoffering

**Level: Introductory to Intermediate**

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

**Who should attend**
Members in the NFPO sector and practitioners who audit or provide advice to registered charities or NFPO entities. It is not appropriate for those specifically involved with government not-for-profits applying standards prescribed by the Public Sector Accounting Board. Those who are responsible for preparing, analyzing, or auditing financial statements from smaller NFPOs, and/or those interested in a review of current standards may prefer to attend NFPO – A Survey of the Standards under Part III of the Handbook.

**Benefits of attending**
The seminar will provide those involved in charities and NPOs an introductory understanding of the accounting and tax issues facing these organizations. Participants in public practice will gain an understanding of the accounting and tax issues specific to non-profit entities to provide valuable services to their not-for-profit clients.

**Content**
- Canadian GAAP for charities and not-for-profit financial statements
- Differences between Part III and PSAB 4200 series
- Typical audit issues faced by auditors of these entities
- Tax compliance requirements for charities and not-for-profits
- Canadian tax rules with respect to loss of tax exempt status and planning techniques to minimize this risk
- Latest proposed and enacted tax legislation affecting these entities

**Seminar Leader/s**
Gerry Lacroix, CPA, CA
Chris Trenaman, CPA, CA

June 22, 9am - 5pm | CPANS Learning Centre
1 Passport Day | 7 PD Hours

FINANCE

Controllership - A Partner for Business
PD16170021 | Reoffering

**Level: Intermediate**

Today’s Controller must be a dynamic professional, with comprehensive business knowledge and exceptional leadership, management and interpersonal skills that complement proven financial skills. A Controller must possess these leadership skills to successfully balance diverse organizational objectives with their financial responsibilities to add full value to their organization. As the economic environment continues to fluctuate through impacts of world events, a Controller must be adaptable to meet the business challenges and complexities facing their organizations.

This seminar provides an overall understanding of the skills and tools necessary to effectively fulfill the Controller’s varied business responsibilities. Participants will learn how to add value in their organizations and will have opportunities to practically apply what they learn through interaction and knowledge exchange with their peers. Although an overview of the financial aspects of the role will be discussed, more emphasis will be placed on the ‘value-added’ role of the Controller.

**Seminar Outline**
- Essential skills and responsibilities of an effective controller
- Development and management of strategy & strategic planning
- Financial & risk management
- IT management
- Effective people management
- Effective crisis management and prevention
- How a controller can progress from a finance professional to a business leader
- How a controller can have more impact on their organization which leads to a higher level of personal and organizational success
- How to add more value and thus be accepted as a trusted business partner for the organization
- How higher level strategic thinking contributes to the future success of an organization

**Who Will Benefit**
Finance professionals working towards a controller position, who are new to the position of controller, or long-time controllers looking for new tools/ideas on leadership.

**Notes**
This seminar will focus on the leadership aspects of the Controller’s role and thus, day-to-day operational activities will not be covered in any depth.

**Seminar Leader/s**
Blair Cook, CPA, CA, CPA (IL), MBA

June 6-7, 9am - 5pm | CPANS Learning Centre
2 Passport Day | 14 PD Hours
FINANCE

Financing Strategies
PD16170031 | Reoffering
Level: Intermediate

Objective
The objective of this seminar is to provide an in-depth review of the various forms of financing to fund capital projects, acquisitions or to restructure an existing capital structure. It will review the various forms of financing including government financing, operating lines, term debt, subordinated debt, real estate financing, and private and public equity. The seminar will dive into the practical details of what capital providers are seeking, issues that arise, and how companies should prepare themselves to execute a financing transaction.

It will also provide current status of the capital market conditions as it relates to the various forms of financing, as well as benchmarks and rules of thumb regarding realistic financing parameters.

Who should attend
The goal of the seminar is to provide controllers, chief financial officers, chief executive officers and other financial executives with tools required to provide strong input or take the lead in undertaking a financing transaction within their own enterprises.

Benefits of attending
Through real-life examples, identifying common pitfalls, highlighting key elements and case studies, the seminar will put financial executives in a better position to seek and negotiate with capital providers.

Content
• overview of financing strategy and capital markets
• current state of the capital markets
• basic capital structure elements
• government financing
• operating lines and term debt
• mezzanine and subordinated debt
• real estate financing
• private equity
• public equity and convertible debentures
• understanding cost of capital
• cost of capital and investment decisions
• financing process and negotiating strategies

Seminar Leader/s
Blair Cook, CPA, CA, CPA (IL), MBA

May 24, 9am - 5pm | CPANS Learning Centre
1 Passport Day | 7 PD Hours

FINANCE

Management Accounting Refresher
PD16170041 | Reoffering
Level: Introductory

This seminar provides participants with an overview of key concepts and decisions in management accounting. Participants will gain an understanding of the variety of management accounting information available within an organization, the decisions that are impacted by management accounting and an improved ability to understand issues and communicate with others regarding management accounting concepts. A case study is used throughout the seminar to help you apply these concepts in a practical scenario. You will leave this seminar with a refreshed grasp of management accounting concepts, including different types of costs and cost behavior, job order and activity-based costing, decision making using management accounting information and much more.

Who will benefit
Professionals interested in a refresher of key concepts and decisions using management accounting information.

Learning outcomes
• Understanding the variety of management accounting information available within an organization
• Understanding the decisions that are impacted by management accounting information
• An improved ability to understand issues and communicate with others regarding management accounting concepts

Special instructions
Participants are encouraged to bring a calculator.

Topics include
• Different types of costs and cost behaviour.
• Job order and activity based costing.
• Cost volume profit (CVP) analysis.
• Budgeting.
• Decision making, using management accounting information (e.g. make or buy, add or drop, scarce resource allocation).
• Transfer pricing.
• Performance management (e.g. the balanced scorecard)
• Communication with Non-Financial Managers.

Seminar Leader/s
Kelly Nelson, FCPA, FCA

May 30, 9am - 5pm | CPANS Learning Centre
1 Passport Day | 7 PD Hours
**FINANCE**

**Practical Financial Negotiation Tips**  
PD16170051 | Updated

*Level: Intermediate*

This half day course covers many useful financial negotiation tips, illustrated by real-life examples that will get you thinking. This seminar will also cover key watch-outs and approaches to avoid. Participants will work through mini-cases, to apply principles and increase their creativity. They can also bring current work negotiation situations to class to brain storm on them. This seminar was created and is presented by an experienced CFO, with extensive real-life insight. He is also the creator and present of the popular Practical Tips for Controllers & CFOs seminar (attended by over 4,200 accountants) and other seminars.

- General financial negotiation tips
- Financing negotiations
- Purchasing negotiations - service and goods
- Complex deals with multiple elements
- Working the numbers to your advantage
- Finding new angles and dimensions to negotiate
- Sharing success with the other party
- Examples in various industries and contexts

**Who should attend**

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

**Seminar Leader/s**

Stephen Priddle, CPA, CA, CMA

June 16, 9am - 12pm | CPANS Learning Centre  
½ Passport Day | 3 PD Hours

**INFORMATION TECHNOLOGY**

**Advanced Data Magic with Excel**  
PD16170061 | Reoffering

*Level: Advanced*

Ready to take your Excel skills to the next level? This seminar starts by clarifying some key Excel misunderstandings. We will then discover how advanced Excel functions will improve your calculating skills. Need to bring in data into Excel from an outside source? The seminar will cover this in depth. You will learn how to use Excel's data analysis tools, including advanced lookups. Then the course dives into array formulas, a powerful tool that very few Excel users understand. Finally, you will be exposed to PowerPivot, a tool in Excel 2010 and 2013 that enables you to work with large amounts of data from multiple data sources.

**Who Will Benefit**

The seminar is designed for intermediate users who want to further their Excel skills to the next level. You will leave the seminar with a clear understanding of how to use the many advanced tools in Excel that few users take advantage of.

**Special Instructions**

This seminar requires an intermediate level of Excel knowledge. Note that users of Excel 2007 will be able to complete all of the topics covered in the course, with the exception of the fifty minutes on PowerPivot. The seminar is “laptop friendly,” so feel free to bring your laptop equipped with Excel 2007 or higher so you can follow along with the instructor.

**Topics Include**

- Understand how Excel calculates; creating custom formats; and date arithmetic.
- Learn how to use Excel functions such as AND, OR; CHOOSE, INDEX, MATCH and INDIRECT.
- Learn how to access external data such as importing from ACCESS, importing from other file types, using Microsoft Query and using a data dictionary to find the data you want to import.
- Discover data analysis tools such as Goal Seek, Data Tables, Scenario Manager and Solver.
- Understand the power of lookups, VLOOKUPS with IFERROR, VLOOKUPS with wild cards, combining VLOOKUPS and doing a VLOOKUP across multiple sheets.
- Discover array formulas to simplify complex calculations, including single arrays, multi-cell arrays, comparative arrays, conditional formatting with arrays and more.
- Discover the power of Excel PowerPivot, Power View, Data Models, DAX calculations and Power Map.

*Note: PowerPivot is not available in Excel 2007, is a free download from Microsoft.com for Office 2010 and only available in Office 2013 Professional Plus or Office 365 ProPlus versions.*

**Prerequisites**

Intermediate level of Excel knowledge

**Who should attend**

Accountants and other professionals who want to learn advance techniques in Excel. Experienced Excel users who want their knowledge of Excel to move to the next level.

**Seminar Leader/s**

Ward Blatch, CPA, CA, MCSA

May 25, 2016, 9am - 5pm | CPANS Learning Centre
1 Passport Day | 7 PD Hours
INFORMATION TECHNOLOGY

Excel Advanced
PD16170071 | Reoffering | Level: Advanced

Although many accountants consider themselves experts in using Excel, most accountants are self-taught and do not use Excel to its full potential. This course takes experienced, self-taught users to the next level. It provides real world examples developed by accountants for accountants in the following six major topic areas: collaboration and workbook security; using tables to analyze and report data; integrating and manipulating data from external sources; creating and auditing complex formulas; advanced data analysis with subtotals, filters, and PivotTables; and using charts to analyze and communicate information. Its content is based on twenty years of experience in delivering Excel training to accountants and on feedback from thousands of accounting and financial professionals just like you. If you use Excel extensively, you need this course! Participants will have access to sample data files.

Learning Objectives
Describe best practices for securing and collaborating Excel workbooks, including Encryption, Digital Signatures, Sharing and Merging workbooks, and Publishing Excel workbooks to SharePoint
• Describe Tables and understand how to use Table names, turn a Table into a Range and Analyze the Data using Filtering and Sorting, Structural Reference and Advanced Filters
• Explain how to import data from Text files, XML files, Access tables, and ODBC and MS Query and then use Data Cleanup Tools such as Text to Columns and Transposing Columns and Rows
• Use advanced functions – SUMPRODUCT, VLOOKUP, HLOOKUP, MATCH, INDEX, NETWORKDAYS, RAND, RANDBETWEEN, NPV, IRR, MIRR – to create and audit complex formulas
• Describe advanced data analysis techniques such as Data tables, Subtotals, Filters, PivotTables, and PivotCharts
• Describe techniques used to create, manipulate, and customize charts for analyzing and communicating information

Prerequisites
Intermediate level of Excel knowledge

Who should attend
Accountants and other professionals who want to learn advance techniques in Excel. Experienced Excel users who want their knowledge of Excel to move to the next level.

Seminar Leader/s
Ward Blatch, CPA, CA, MCSA

May 26, 9am - 5pm | CPANS Learning Centre
1 Passport Day | 7 PD Hours

Instructional delivery method for Advanced Data Magic, Excel Advanced and Excel Tips, Tricks & Techniques
Group-live demo and discussion using color computer projection – this course is “laptop friendly,” so feel free to bring your laptop equipped with Excel 2007 or above. Please note: This course will be taught in Excel 2016. Reference will be made to the differences between Excel 2016 and Excel 2013, 2010 and 2007.

For Course Fees, see Pricing Information | For Instructor Bios, see Instructor Bios

INFORMATION TECHNOLOGY

Excel Tips, Tricks & Techniques for Accountants
PD16170081 | Reoffering | Level: Intermediate

Excel is the accountant’s tool of choice for analyzing and reporting financial data, yet most accountants have never received any formal Excel training. As a result, many accountants use time-consuming and error-prone processes to complete everyday tasks. This highly acclaimed course contains hundreds of tips, tricks, and techniques to improve your productivity. Its content is based on over twenty years of experience in delivering Excel training to accountants and on feedback from tens of thousands of accounting just like you. The course has six major areas of topical coverage: productivity tips and tricks, formatting essentials, customizing Excel, formula-building essentials, three-dimensional workbooks, and printing essentials. If you are an Excel user, regardless of your level of experience, and you have never taken a formal Excel training course for accountants, you need this course! Participants will have access to sample data files.

Learning Objectives
• Identify tips and tricks in Excel such as freeze panes, split windows, selecting cells with special characteristics, using autocorrect, adding date and time stamps, working with the office clipboard, and paste special and describe how to use each to increase productivity with Excel
• Describe tools and techniques for formatting in Excel, including multiline column headings, the accounting format, custom date and number formats, and conditional formatting
• Identify opportunities to customize Excel and describe procedures for customizing the ribbon, customizing the quick access toolbar, adjusting Excel’s options, using templates to increase productivity, modifying Excel’s global templates, and working with custom themes
• Describe Excel’s formula building tools, including absolute vs. relative cell references, the formula tab, performing calculations on dates, splitting and combining text strings, using the text to columns wizard, working with defined names, conditional calculations, VLOOKUP and HLOOKUPs
• Describe how to link data from multiple Excel workbooks, including creating links, handling broken links, combining single-sheet workbooks, creating sum-through formulas & rolling reports
• Define the process for printing data from Excel, including describing how to adjust various print settings, using the camera feature to create report forms, and working with custom views to automate print settings to print reports

Prerequisites
Fundamental knowledge of Excel operations

Who should attend
Accountants who want to learn how to use Excel more efficiently and effectively. Users or potential users of Excel 2007, 2010 and 2013.

Seminar Leader/s
Ward Blatch, CPA, CA, MCSA

May 27, 2016, 9am - 5pm | CPANS Learning Centre
1 Passport Day | 7 PD Hours
**MANAGEMENT REPORTING**

**Behind Boardroom Doors: Achieving Governance Advantage**

**PD16170091 | Reoffering**

**Level: Intermediate**

This one day session uses a blend of case-based learning with presentations of thought leadership on achieving governance excellence in any organization, be it in a non-profit, private, or public entity. The course is designed to look at governance from the perspective of developing more effective directors the executives they appoint. A strong board of directors presents any organization with the opportunity to achieve governance advantage. Governance advantage describes an organization that leverages the contributions of their board and their individual directors’ talents to improve strategic management, leadership development, and improve alignment with the owners/members of the organization.

The target audience for this course includes: senior financial professionals, directors, and executives who serve on or for a boards of directors.

**Topic Outline**

- Governance models and the different kinds of boards
- Constitution of the Board and the roles of directors and management distinguished
- The 3 board leadership roles of Governance Advantage
- The CONDUCTOR: Discussing what matters
- The INFORMER: Communicating what matters
- The FACILITATOR: Deciding on what matters
- The Board’s role in strategic and risk management
- The Board’s role in leadership development and succession planning
- The Board’s role in making capital allocation decisions

**What you are getting (and not getting)**

- This course focuses on implementing leading governance practices that make a true difference
- This course is not a summary of the legal or regulatory requirements
- This course is practical and hands on with a high degree of interaction between participants and the session leader
- This course is not theoretical, nor is it entirely presented in a lecture style
- This course emphasizes an open-ended, collaborative approach to discussing the relevant topics
- The course is not prescriptive because the topic is not prescriptive in practice

**Seminar Leader/s**

Blair Cook, CPA, CA, CPA (IL), MBA

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**MANAGEMENT REPORTING**

**Practical Tips for Controllers and CFOs**

**PD16170111 | Updated**

**Level: Intermediate**

This course covers several hundred useful tips for accountants in financial leadership. The tips are illustrated through concrete examples derived from practical experience. You won’t find these tips in courses or text books, but you’ll be able to use many of them. Value will also be derived from the sharing of experiences and practices by the participants. This seminar “grows” continuously as new tips are added from past participants. It provides specific opportunities for benchmarking your practices with those of your peers. Over 3,600 accountants have attended this seminar. This seminar is the companion course to Practical Tips for Controller & CFOs – The Case Course. The seminar was created and is presented by an experienced CFO, with extensive real-life insight.

**Agenda**

- Great tips on key indicator reporting
- Getting the most out of your bank
- Cash flow crisis: what to do when it happens
- Cost-cutting tips
- M&A: the good, the bad and the ugly
- The fast close System conversion dos and don’ts
- More creative thinking for accountants
- Auditors & lawyers: minimizing costs
- More useful financial reporting

**Who should attend**

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

**Seminar Leader/s**

Stephen Priddle, CPA, CA, CMA

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June 15, 2016, 9am - 5pm  |  CPANS Learning Centre
1 Passport Day | 7 PD Hours

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June 21, 2016, 9am - 5pm  |  CPANS Learning Centre
1 Passport Day | 7 PD Hours
MANAGEMENT REPORTING

Ten Practical Topics for Accountants in Leadership
PD61170121 | Updated
Level: Intermediate
This interactive, half-day workshop, led by corporate veteran Stephen Priddle, CA, CMA, provides a useful discussion, tips and applications on ten financial leadership topics. The workshop includes several interactive table brain-storming sessions. There is something for everyone in this workshop, which covers:

1. The top 10 trouble spots for financial leaders
2. Dealing with the sales dept – who often don’t listen!
3. Leading by example
4. Developing economic predictors for your organization
5. Insurance tips
6. Measuring the performance of the finance function
7. Payroll & benefits tips – reducing this cost
8. Financial forecasting keys
9. Travel cost saving tips
10. What every CEO needs in a financial leader

Who should attend
The seminar is aimed at accountants in leadership positions, such as Controllers, CFOs and directors of finance, as well as accountants in public practice or consulting, who advise clients. It is also helpful for accountants moving toward these roles.

Seminar Leader/s
Stephen Priddle, CPA, CA, CMA

June 16, 2016, 1pm - 5pm | CPANS Learning Centre
½ Passport Day | 4 PD Hours

PROFESSIONAL & PERSONAL SKILLS

Managing Absenteeism in the Workplace
PD16170131 | New
Level: Introductory
This half day session is designed to address topics resulting from absenteeism and its impact on the workplace including: effective policies, procedures and practices. Also, managing and accommodating employees which are sick or disabled and effectively return them to the workplace.

Who Will Benefit
Accountants who have responsibilities for Human Resource matter will particularly benefit from this session.

Seminar Leader/s
Lisa Gallivan

June 23, 2016, 9am - 12pm | CPANS Learning Centre
½ Passport Day | 3 PD Hours
PROFESSIONAL & PERSONAL SKILLS

Delegation - Sharing the Load Effectively
PD16170141 | Reoffering
Do you work long hours and feel under constant pressure to shift from one task to another all day long? Are you too busy to devote enough time to important work like creativity, strategic thinking and improving procedures. The busier you are, the easier it is to fall into the trap of saying to yourself “it is faster to do it myself.”

Delegation extends results from what you can do to what you can control. It frees you up to think and plan more effectively, to focus on the important work that only you can do. This workshop will help you bring out the best in your people by delegating effectively and creating a work environment that breeds commitment, encourages self-motivation and improves team contribution.

After this workshop you will be able to
• Use five key questions to help identify what and when to delegate
• Set concrete goals and create action plans to reach performance targets
• Use accurate, specific language and check for understanding
• Clarify the results and outcomes you want, but let the delegatee choose the method.
• Teach your delegates to problem solve, then insist that they solve their own problems
• Ask good questions to help people make their own decisions
• Monitor work in progress and give timely and accurate feedback
• Use a checklist to uncover and then reduce perfectionism
• Encourage everyone to do the best they can with the time and energy they have
• Focus critical feedback on outcomes and give it immediately in private
• Focus on what is missing, not on what is wrong
• Use the RAP process to keep two-way communication open and build your appraisal file
• Give genuine praise and celebrate successes as often as you can

Who will benefit
Managers, supervisors and team leaders who are responsible for getting work done through others and who want to enhance their own development and that of their staff.

Seminar Leader/s
Eileen Pease, BA, B.Ed., M.Ed., CHRP

June 28, 2016, 1pm - 4pm  |  CPANS Learning Centre
½ Passport Day | 3 PD Hours

PROFESSIONAL & PERSONAL SKILLS

Employment Law A-Z
PD16170151 | Reoffering
This session is designed to familiarize participants with the most important employment issues in today’s challenging legal environment. Effectively anticipating, avoiding, and managing employment issues are critical in having your office run effectively. This seminar will assist in helping you anticipate issues and deal effectively with both ongoing employment issues as well as providing advice on how best to terminate employment.

Topics to be covered
• overview of key legislation – Employment Standards, Human Rights and Occupational Health and Safety
• the application process – what you can ask and steps you should take
• Employment Agreements – are they right for your organization?
• managing problems during employment – absenteeism, bullying and harassment in the workplace, and managing the “low performing” employee
• progressive discipline – “do’s and don’ts”
• termination without cause – best practices
• Human Rights issues on termination of employment – particularly mandatory retirement.

Who will benefit?
Accountants who have responsibility for Human Resource matters will particularly benefit from this session

Seminar Leader/s
Peter McLellan, QC

June 13, 2016, 1pm - 4pm  |  CPANS Learning Centre
½ Passport Day | 3 PD Hours
PROFESSIONAL & PERSONAL SKILLS

Get More Power from Your Brain
PD16170161 | Reoffering

The brain is a fantastic resource that is frequently under-used, because many of us do not understand how it works. Habits we have had for years, that we are not even aware of, cause us to overload or block our short term memory.

These unrecognized habits literally weaken our brain power.

Learn how to work more effectively WITH your powerful brain and enhance your reading, writing, listening and communication skills.

Program content
- How to develop a dependable memory
- How to set up conditions to fully engage your brain
- How to take a more effective approach to multi-tasking
- How to change habits that aren’t working for you
- How sleep can enhance learning and memory
- 10 Ways to keep your brain healthy

Program benefits
In this course you will learn to:
- Enhance your communication and interpersonal effectiveness in the delivery of your thoughts and ideas
- Professionally manage your stress, worry and anxiety
- Quickly identify your options when faced with conflict
- Have greater control over your brain’s power
- Understand the role of your intuitive and kinesthetic right brain while getting full value from your logical, sequential left brain
- Understand the role of perception
- Use an effective listening and paraphrasing technique to develop rapport
- Set up practice with feedback to enhance the skills you want to grow
- Spring the mental traps that keep you stuck

Who will benefit
Anyone who works with a variety of people in different situations, and who wants to remember more, feel sharper and enhance his or her interpersonal skills.

Seminar Leader/s
Eileen Pease, BA, B.Ed., M.Ed., CHRP

June 2, 2016, 9am - 5pm  |  CPANS Learning Centre
1 Passport Day | 7 PD Hours

PROFESSIONAL & PERSONAL SKILLS

Get Organized & Take Control @ Work
PD16170171 | Reoffering

Gain a renewed sense of clarity, calm and control by learning to organize your time, your space and your stuff so that you become more efficient, effective and productive.

- Do you start your day only to get to the end and find you really haven’t accomplished anything important?
- Do you need to cut back on unproductive time spent searching for information?
- Do you know you need better organizing systems, but have no idea where to start?

Learn from an experienced Certified Professional Organizer® how to set up your workspace to maximize efficiency, manage your email more effectively, take control of your day, and establish organizing systems for improved productivity.

Learning Outcomes
- Discover how you can benefit from being more organized
- Understand how you begin to get organized
- Evaluate yourself in 4 key areas of organization
- Learn key practices to get organized and stay organized
- Learn to take control of your workday

Content
- What’s your organizing style?
- Setting up your office for efficient workflow
- Personal Productivity Assessment
- Creating effective filing categories
- Managing Email
- Working with your To Do list
- Using your Calendar effectively
- Creating your plan for becoming more organized

Who Should Attend
You will benefit from this session if you are someone who:
- Is overwhelmed by how much you have to do each day
- Misses deadlines at work or forgets to do things altogether
- Feels stressed out by the mess on your desk
- Has too much ‘stuff’ in your office and no place to put it
- Spends too much time looking for things
- Loses important documents or information
- Knows you need a system but you have no idea where to start

Seminar Leader/s
Jane Veldhoven, CPO®

June 23, 2016, 1pm - 4pm  |  CPANS Learning Centre
½ Passport Day | 3 PD Hours

For Course Fees, see Pricing Information | For Instructor Bios, see Instructor Bios
PROFESSIONAL & PERSONAL SKILLS

Strategic Relationship Skills for Influence

Creating Connections

PD16170181 | Reoffering

As much as 80 or 90% of everything that we accomplish, is done so with the assistance of others. Our personal and professional success as leaders depends in large part on the influence we exert within our networks, and great relationships are instrumental to our influence and ultimate success. As professionals, we interact with a variety of people and building strong interpersonal relationships in today’s business world can be challenging. As we become more connected digitally, it takes seemingly more effort to achieve real interpersonal connections. Strategic relationship skills allow us to assess and adapt to the needs of others while accomplishing the goals we set out to achieve, all while building trusting relationships.

Whether you are an introvert or extrovert, shy or gregarious, strategic relationship skills can help improve your business rapport with clients, team members, bosses, and direct reports, creating strong relationships to support the achievement of your goals. During this workshop, we will explore a variety of strategic relationship skills, including strategies for challenging situations. This workshop provides practical application using case studies and examples, as well as personal reflection, to help you identify strategies that complement your personal style, allowing you to build stronger relationships across your personal and professional networks.

Key Learning Outcomes

• Tools to build your adaptable relationship style by first understanding your role, style and preferences and how these influence your interpersonal interactions.
• Practical approaches to interaction opportunities, including how to quickly assess the preferences and needs of others, and how to adapt your approach to build rapport more quickly and, as a result, build stronger relationships to create more influence.
• Effective networking strategies, for both introverts and extraverts.
• Understanding relationship dynamics and trust, including practical tools for dealing with difficult and/or awkward situations while still preserving the underlying relationship.
• This workshop may appeal to you if:
• Strong relationships are critical to your personal, team, or organizational success
• You work with a variety of personality styles, some of which you may find challenging
• You are looking for ideas to support how you can network more effectively

Seminar Leader/s

Maureen Gillis, CPA, CA

June 20, 2016, 9am - 4pm  |  CPANS Learning Centre
1 Passport Day | 6 PD Hours

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PROFESSIONAL & PERSONAL SKILLS

Teach Your Team to Fish

Coaching Knowledge Workers Effectively

PD16170191 | New

As professionals, we are trained advisors. People come to us for answers, and they expect us to have them. When it is our team members who come to us for answers, what do we do? If we are like many leaders, chances are, we give them the answer.

As Maimonides said, “Give a man a fish and you feed him for a day; teach a man to fish and you feed him for a lifetime.” Let’s teach our team to fish! While providing the answer (giving them the fish) may be effective in the short term, our long term organizational success is best supported by growing and developing our team (teaching them to fish); that is, coaching them effectively to build their problem solving skills. This supports our evolution and effectiveness as leaders since we can then, in turn, spend our energy on more valuable activities critical to the organization’s success.

Whether you are an experienced leader or newly managing a team of employees, teaching your team to fish can help improve your team's productivity and enhance organizational results as you effectively coach employees to look at the issues they encounter from different perspectives, supporting them as they problem solve to identify viable options and solutions.

During this workshop, we will explore a variety of interactive and reflective exercises designed to identify practical skills and tactics you can apply in your daily work. We will use case studies and examples with the goal of outlining strategies, frameworks, and practical approaches that can support your role as a leader and as a coach.

Key Learning Outcomes

• An understanding of the key ingredients for a strong coaching relationship
• Practical approaches to coaching opportunities, including a framework for conversations
• Tools to assist in determining when a coaching conversation may or may not work
• Practical suggestions for implementing a coaching approach, including things to avoid
• This workshop may appeal to you if:
• You have recently been promoted to a management role
• You are interested in developing employees on your team, or improving their performance
• You aspire to a leadership role and want to build your leadership competencies

Seminar Leader/s

Maureen Gillis, CPA, CA

June 30, 2016, 9am - 4pm  |  CPANS Learning Centre
1 Passport Day | 6 PD Hours

For Course Fees, see Pricing Information  |  For Instructor Bios, see Instructor Bios
PROFESSIONAL & PERSONAL SKILLS

Time and Priority Management
PD16171111 | Reoffering

We all face a daily dilemma of too much to do and not enough time to do it. Time management concerns how we resolve that dilemma. Time, not activities, is the limiting factor. We must make tough choices about what to do and what not to do.

Time management is really self-management. Although time is not adaptable, people are. Managing time means adapting ourselves to its passage in some satisfying manner. It means managing our thinking. If time seems to be out of control, it means that we are out of control. To bring ourselves back under control we must learn new, more appropriate thinking techniques and habits.

After this workshop you will be able to...
• Analyze the roles that you play and how you spend your time
• Distinguish between priorities, obligations, and time wasters
• Clarify your work related and personal goals
• Prioritize goals into rational, achievable tasks
• Create a realistic, short “To-Do” list
• Get yourself and your work space organized
• Use file management tips for your computer and filing
• Understand the pitfalls of multi-tasking
• Recognize your automatic thinking vs your reflective thinking
• Appreciate how you deplete your willpower, and give in to temptation
• Manage your phone and e-mail time more effectively
• Establish structure and control in time sensitive environments
• Create momentum with difficult tasks

Of Interest to
This course is ideal for people from all levels and functions who wish to manage their time better and to utilize the technological tools at their disposal to their greatest advantage. Participants are provided with a reference manual that contains detailed information to support you back at the office.

Seminar Leader/s
Eileen Pease, BA, B.Ed., M.Ed., CHRP

June 27, 2016, 9am - 5pm | CPANS Learning Centre
1 Passport Day | 7 PD Hours

PROFESSIONAL & PERSONAL SKILLS

Transforming Leadership from the Inside Out
PD16171121 | Reoffering

While corporate life has always been demanding, the pressures to accomplish more with less has been exacerbated by many factors including: the expectation of instant communication via technology, global competition, economic downturns and baby boomers retiring in great numbers resulting in job gaps in many sectors. These and other stressors have made leadership in the 21st century more taxing.

Most leaders have little or no time for renewal or self-reflection. They are often operating on automatic pilot as human “doings” with a ceaseless onslaught of priorities and fires to put out. Meanwhile the development of other skills related to more effectively managing their relationship with themselves and others tends to be overlooked. Leadership presence is undermined. The awareness and development of inner capacities is needed for increased effectiveness in both the “being” and “doing” states of leadership.

According to renowned author/consultant Kevin Cashman developing your inner capacities means helping senior executives master ways to lead more effectively by focusing on an “inside out” personal growth process. This fosters growing the whole person as a leader. Important character traits that inform the definition of internal capabilities include: authenticity, openness, trust, balanced concern for self and others, courage, and a peaceful presence.

A central focus on productivity and efficiency has created leaders with a skill set that has thwarted growth in the area of relationship with others, building future leaders and leadership presence.

In this hands-on workshop full of practical models we will explore:
• The connection between Leadership Presence and Emotional Intelligence
• A model for Eight Powers of Leadership and how to utilize as a self directed leadership development program
• Seven key strategies for fostering the inner capacities of your direct reports

When leaders develop their own inner capacities and support their direct reports to do the same, a more positive, trustworthy culture can be generated in the workplace. This positive culture is grounded in a series of respectful, authentic conversations that set the stage for the ongoing growth and development of all employees regardless of role or position.

Who Should Attend
Executives, managers, supervisors, human resource professionals and anyone interested in moving into their next level of leadership.

Seminar Leader/s
Mara Vizzutti, B.Ed., MA

June 29, 2016, 9am - 4pm | CPANS Learning Centre
1 Passport Day | 6 PD Hours
PROFESSIONAL & PERSONAL SKILLS

When Perfect is Not Good Enough
PD16171131 | Reoffering

People who are perfectionistic have unrealistically high expectations for their own performance, but take little joy in their accomplishments because their results are never quite good enough. This means that sometimes they avoid taking on certain challenges because they fear that they can’t do them perfectly. Unlike high achievers who enjoy the “flow” of marshaling their strongest skills, stretching towards a challenge, and doing the best they can with the time and energy they have, perfectionists focus only on the goal and find the hard work and long hours exhausting and the results imperfect.

High achievers set high standards for themselves and work energetically to achieve excellence, but their whole sense of self-worth is not dragged down if they don’t meet those standards perfectly. If you suspect that you may be a perfectionist or you live or work with a perfectionist, taking this course will decrease your stress and increase your enjoyment of your work and your life.

This workshop will help you
- Identify perfectionistic tendencies in yourself or others
- Understand the drawbacks of having unrealistically high expectations
- Turn your internal bully into your cheerleader
- Understand why a perfectionistic leader is often a poor delegator and difficult to work with or for
- Recognize that the best employees eventually leave a perfectionistic boss
- Accept that procrastination and perfectionism tend to go hand in hand
- Work productively with a perfectionistic boss or coworker
- Live happily with a perfectionistic spouse or adolescent

You will learn to
- Set challenging but realistic goals
- Do a cost-benefit analysis of perfectionism
- See mistakes and constructive criticism as helpful feedback
- Learn several strategies for coping with perfectionistic tendencies
- Understand extreme perfectionism leads to high anxiety, frustration, fear of failure, and exhaustion
- Recognize the high cost of perfectionism on your work, health, relationships, and family

Who will benefit
Managers, team leaders, and professionals who want to work and or live more happily with a perfectionistic boss, co-worker, spouse, or adolescent - OR - Managers, team leaders, or professionals who suspect they might have perfectionistic tendencies and would like to know how to overcome those tendencies. And evolve into healthy, happy high achievers.

Seminar Leader/s
Eileen Pease, BA, B.Ed., M.Ed., CHRP

June 28, 2016, 9am - 12pm | CPANS Learning Centre
½ Passport Day | 3 PD Hours

PROFESSIONAL & PERSONAL SKILLS

Who You are is How You Lead: Unleashing Leadership Excellence
PD16171141 | Reoffering

This course focuses on increasing people’s self-awareness so they make better choices, have better skills to deal with the challenges in front of them, which in turn increases self-confidence, engagement and makes them better leaders. A person’s effectiveness is directly related to the accuracy of their self-perception in the world. In other words, building on your knowledge and level of self-accuracy is key. Most of us are aware of how we could be more effective but we may continue to repeat patterns of behavior that are not supporting our overall success and contentment.

Heightened awareness about ineffective patterns in combination with practical tools is vital to building capacity and success. Many professionals possess a high degree of competency within the realms of hard skills, education and intelligence. We’ve been taught how to perform and get things done. However, in order to become more effective leaders we must also inform our doing with more effective being.

Working as an executive coach I witness the challenges leaders face in not having enough time for their own development with the goal of building inner capacity and efficacy. Here is an overview of the purpose, objectives and key modules for this hands-on program.

Purpose
To Increase Your Leadership Effectiveness

Objectives
- Discover new ways to assess one’s strengths and liabilities.
- Uncover attitudes and beliefs that can be barriers to success and how to shift them.
- Increasing your awareness about your influence upon others.

Key Modules
- My Paradigm: how my belief systems and judgments create my results
- Getting out of our own way: overcoming ineffective attitudes (excuses, justifiers) and patterns
- Stretching one’s comfort zone without stretch marks
- Redefining what we think Accountability means in leadership
- Understanding our reactions to situations in more depth with a focus on relating to the way things are, rather than resisting them
- Overcoming Worry/Guilt/Resistance/Resentment
- Clarifying one’s values as a key cornerstone to navigating all aspects of leadership
- Practical techniques for stress reduction

Who should attend
Executives, managers, supervisors, human resource professionals and anyone interested in moving to their next level of leadership.

Seminar Leader/s
Mara Vizzutti, B.Ed., MA

June 1, 2016, 9am - 4pm | CPANS Learning Centre
1 Passport Day | 6 PD Hours

For Course Fees, see Pricing Information | For Instructor Bios, see Instructor Bios
PROFESSIONAL & PERSONAL SKILLS

Write with Confidence for Professionals
PD16171151 | Reoffering

*Level: Introductory*

Clear writing is critical for accountants. Communications with clients, colleagues, tax authorities and other professionals must accurately and precisely convey the required information. Poor writing leads to miscommunications. Sloppy sentences can be misconstrued. Emails and “remails” seeking clarification waste the time of the writer and the reader.

Studies show accountants spend up to three hours a day producing documentation. This includes financial statements, special reports, opinions, emails, work-paper review comments, tax forms and other communications.

This course will show you how to use plain English to avoid ambiguity. You will increase the quality of your writing while decreasing the time you spend writing. You will learn how to prepare your thoughts and how to compose them so the reader will understand you perfectly.

Taxes are complicated – writing shouldn’t be.

**People who have taken this workshop report that they are able to:**

- Get their thoughts organized quickly to get off to a fast start
- Use openings that guide the reader to their message
- Shorten and simplify their documents using five key editing techniques
- Know why briefing notes follow the format they do and precisely how they are used
- Understand the technical writing requirements – quick comprehension, clear navigation, completeness and accuracy
- Use four main visual techniques to make their writing more inviting

The time you spend on this course will soon be recuperated in improved writing speed and clarity. As a bonus, your clients and colleagues will save time, too, as they no longer have to re-read what you’ve written. The class is fun, interactive, and full of practical advice.

**After this workshop you will be able to**

- Understand the “Circle of Good Writing”
- Clarify your objectives
- Assess your audience
- Use the “Five Principles of Clarity”
- Write so clearly that your reader gets your message quickly and easily

To test their application of the principles on the job, participants may send documents to the workshop leader for review after the course.

**Seminar Leader/s**

Jon Tattrie

May 31, 2016, 9am - 5pm | CPANS Learning Centre
1 Passport Day | 7 PD Hours

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TAX

Catching Up: 5 Years of Income Tax Developments
PD16171161 | Reoffering

*Level: Intermediate*

**Objective**

Income tax changes and evolves over time. “Keeping up” is necessarily a continuous process. Unfortunately, many people don’t have the time or resources and consequently fall behind. They wonder how they can “catch up” on a few recent years of changes at one time. This seminar will provide an opportunity for those who haven’t regularly taken tax update seminars to get “caught-up” on notable federal income tax developments and find out what they may have missed.

**Who should attend**

Anyone, whether in public practice, industry, or the public sector, who feels that they have not paid enough attention to recent income tax developments.

**Benefits of attending**

This seminar will allow you to “catch up” without having to take many tax seminars. It provides an opportunity to learn about the more significant federal income tax developments that have occurred during the past five years. Participants will have a better understanding of recent tax developments and be able to identify areas for which they may want to study further.

**Content**

- the calculation of income
- the deductibility of expenses
- capital cost allowance
- taxation of gains
- retirement saving
- income splitting
- deductions and tax credits
- rules that defer, deem, trigger, prevent or reduce
- income tax rates
- income tax administration
- various other developments

Coverage will also answer questions such as: How has the income tax scene changed? What changes are coming? What new tax pitfalls/strategies have arisen? Where are the new opportunities? What long-time tax strategies have been eliminated or have become more/less beneficial? What other changes need to be considered to facilitate efficient and effective income tax compliance, planning and administration?

**Prerequisite**

Comprehensive understanding of basic corporate and personal income tax

**Seminar Leader/s**

David Cameron, CPA, CA

June 9, 2016, 9am - 5pm | CPANS Learning Centre
1 Passport Day | 7 PD Hours
TAX

Getting a Grip on RDTOH, CDA, and Other Tax Accounts
PD16171171 | Reoffering
Level: Introductory

Objective
With the addition of the Eligible Dividend regime in 2006 and changing tax rates for eligible and ineligible dividends, tax planners are confronted with a multitude of tax accounts that need to be considered in conjunction with each other. This course will provide a detailed review of the key tax accounts for private corporations and tax planning where multiple tax accounts can either be used or impacted.

The course includes a series of mini-cases that demonstrate the issues that need to be evaluated when dealing with these accounts.

Who Should Attend
The seminar will be particularly valuable to anyone involved in tax planning for privately held companies and their shareholders.

Benefits Of Attending
The seminar will provide a brief overview of what the accounts are and how they work with the main focus on the interconnectedness of the accounts and the tax planning opportunities.

Content
• basic considerations for all tax accounts
• GRIP
• LRIP
• RDTOH
• CDA
• CEC
• Mini cases

Seminar Leader/s
Teresa Gannon, CPA, CA
Bryan Whalen

June 14, 2016, 9am - 12pm | CPANS Learning Centre
½ Passport Day | 3 PD Hours

TAX

GST/HST Refresher for Professionals
PD16171181 | Reoffering
Level: Intermediate

Objective
The application of GST/HST is often far more complex than practitioners or businesses appreciate; the principles involved are often quite different than those applied to income tax. Failure to be aware of these complexities can result in lost opportunities, or worse, large tax assessments. This course will review important concepts including HST place of supply rules (which often impact suppliers located in non-HST provinces), registration & collection requirements, taxable supplies and deemed supplies, input tax credit entitlements and some of the more common and important exemptions and zero-rating provisions.

Who should attend
General practitioners, company accountants and other advisors who provide advice on, or participate in, a range of business transactions. This seminar will provide an overview on a selection of important GST/HST issues a practitioner may encounter when working with clients in various industries and identify some important areas which are frequently sources of errors/assessments.

Benefits of attending
At the end of this seminar, attendees will have a greater awareness of when a transaction is subject to GST/HST and at what rate, and an improved understanding of input tax credit entitlements and restrictions.

Content
• fundamental concepts – including ‘commercial activity’
• registration, collection and reporting rules – including HST place of supply rules
• review of input tax credit entitlement rules and other rebates
• brief review of important zero-rating provisions and exemptions including, exports, transactions with non-residents, health care providers, and others. Common real property exemptions and special rules applicable to public sector bodies will be briefly reviewed, but not to the extent covered in other courses.

Individuals seeking in-depth coverage of real estate or non-profit sector topics should consider the GST/HST and Real Property and GST/HST Issues for the Non-Profit Sector courses.

Prerequisite
No specific prerequisite although it does require a good understanding of the basics of the GST/HST system.

Seminar Leader/s
Jeremy Scott, LLB

June 8, 2016, 9am - 5pm | CPANS Learning Centre
1 Passport Day | 7 PD Hours
TAX

Income Tax Planning Refresher for Corporate Tax
PD16171191 | Updated

Level: Intermediate
This refresher seminar is designed for those who desire to update their knowledge in the various taxes and tax planning for the corporate taxpayer. At the end of the two days participants should have a good understanding of the taxes that impact corporations.

Seminar Outline:
Organization of the Tax Act as it relates to corporations
• Determination of residency
• Review of various income items and deductions not commonly seen
• Calculation of corporate taxes
• Common definitions under the Income Tax Act that impact a corporate taxpayer including:
  • Related parties, affiliated parties, and associated corporations
  • Various sources of income including:
    • Active business income, investment income, specified investment business and personal service businesses.
  • Commonly used corporate reorganization provisions:
  • The use of the Section 85 rollover, section 86 capital reorganization, Section 87 amalgamation, and Section 88 wind-up
  • Section 84.1 and section 55(2) anti-avoidance provisions
• Corporate attribution
• Loss utilization
• Owner manager remuneration planning
• Estate planning
• Issues for buy-sell agreements and purchase and sale of business
• Acquisition of control
• Debt forgiveness

Who Will Benefit:
Those involved in corporate tax matters that desire to expand or refresh their knowledge of corporate tax.

Prerequisite:
Participants may consider registering in Tax Returns: Corporate on page 25 prior to taking this seminar or should have equivalent experience in corporate tax matters.

Seminar Leader/s
David Cameron, CPA, CA

May 19-20, 2016, 9am - 5pm | CPANS Learning Centre
2 Passport Day | 14 PD Hours

TAX

Income Taxation of Portfolio Investments for Individuals
PD16171211 | Reoffering

Level: Introductory
Accountants are continually challenged by the creativity in the design and marketing of investment products and strategies. With the proliferation of new products, questions often arise regarding the taxation of the income component. This seminar will explain the application of income taxation to various investment products to assist in the preparation of personal income tax filings and introduce the participant to after tax comparison of alternative investment strategies. The taxation of deposit accounts, bonds, shares, treasury bills, mutual funds, exchange-traded funds, life insurance products, and various registered plans will be addressed. In addition, the course will deal with the constraints imposed by the attribution rules and the tax on split income (“kiddie tax”) on splitting investment income with spouses and partners. This half-day seminar does not cover the taxation of investments held through a corporation.

Who will benefit
Practitioners, investors and advisors who would like to enhance knowledge of how income from portfolio investments is taxed.

Learning outcomes
At the end of the course, you should be able to:
• Calculate the income for income tax purposes from portfolio investments
• Compare the taxation of various investment products and determine how that taxation affects the after-tax return
• Advise clients on the income tax implications of diverse portfolio investment products
• Assist clients in improving the tax effectiveness of their portfolio holdings

Topics include
• Investment Income Taxation - General Rules
• Deposit Accounts
• Shares
• Bonds
• Treasury Bills
• Mutual Funds
• Life Insurance
• Registered Funds

Seminar Leader/s
Jeff Christian, CPA, CA

June 14, 2016, 1pm - 4pm | CPANS Learning Centre
½ Passport Day | 3 PD Hours
TAX

Purchase & Sale of a Business: Income Tax & Related Issues
PD16171221 | Reoffering
Level: Intermediate

Objective
This seminar will provide an understanding of income tax issues with respect to the purchase and sale of a business and will have comments on other issues in a purchase or sale of a business. There are at least six cases. These cases will be introduced at the end of the module to which they relate for application to the technical issues.

It is principally oriented to income tax issues and with respect to actual cases. There is a case on family succession. There is a module on non-tax issues.

Who should attend
Practitioners, industry members, and those in privately owned businesses, who want technical and practical knowledge in taxation issues in the purchase and sale of a business.

Benefits of attending
By the end of the seminar, participants should have acquired technical knowledge and the application of that to real life facts in the sale/purchase of a business.

Content
• How to start - commercial factors – EBITDA
• Non-tax comments
• Due diligence – income tax issues
• Shares - vendor and purchaser
  • the payment of dividends
  • planning for the eligible dividends
  • safe income
  • the use of holding companies
  • sale to employees
  • application of technical issues to cases
• Assets – vendor and purchaser
  • tax rates for capital gains, goodwill, business income
  • the sale of goodwill
  • methods to defer the payment of tax
  • application of technical issues to cases
• Other issues - vendor and purchaser
  • non-resident purchaser
  • provincial tax rates
  • transfers to other provinces
  • case on family succession
  • insurance in company
  • application of technical issues to cases
• Other considerations – interest expense and earnouts
• Model case study

Prerequisite
Experience in providing income tax and business advice

Seminar Leader/s
Bobby Boutilier, CPA, CA

May 17, 2016, 9am - 5pm | CPANS Learning Centre
1 Passport Day | 7 PD Hours

TAX

Tax Planning for Private Enterprises on Business Succession
PD16171231 | Reoffering
Level: Intermediate

Objective
Business succession involving closely-held private enterprises can range from an intra-family estate plan to an arm’s length sale of shares. This seminar will provide practical knowledge of the principal business succession considerations. The focus will be on income tax considerations, although key non-tax issues will also be identified.

Who should attend
This seminar will be useful to accountants in public practice with clients who are owner-managers of private corporations, as well as in-house professionals of private enterprises, especially those facing succession issues.

Benefits of attending
This seminar is designed to provide the knowledge and tools necessary to identify, plan and manage business succession considerations for owner-managers of private enterprises. The content is practical, while covering the pertinent tax issues in some detail. The seminar will provide a working knowledge of the principal tax and non-tax considerations in formulating and implementing business succession plans, along with detailed written materials for reference. Salient tax considerations will be discussed and illustrated by reference to examples. Related planning points will also be covered.

Content
• identifying business succession alternatives
• principal tax and non-tax considerations
• estate freezes, wasting estate freezes, post-mortem strategies
• valuation issues and price adjustment clauses
• utilizing family trusts
• avoiding attribution issues
• alter ego trusts and joint spousal trusts
• intra-family succession
• section 84.1 re-characterization rules
• arm’s length sales of shares
• pre-sale purifications
• utilizing the lifetime capital gains exemptions
• capital gains deferral rules
• divisive reorganizations and section 55
• using life insurance to fund taxes on death
• non-competition payments and related tax issues
• financing considerations
• case study illustrating alternative tax consequences
• tax checklist

Seminar Leader/s
Robert Dean, CPA, CA, CFP

May 16, 2016, 9am - 5pm | CPANS Learning Centre
1 Passport Day | 7 PD Hours

For Course Fees, see Pricing Information | For Instructor Bios, see Instructor Bios
TAX

Tax Returns - Corporate
PD16171241 | Reoffering

Level: Introductory
This seminar provides participants with a broad overview of the income tax provisions which can impact taxpayers filing their corporate tax returns. It provides a comprehensive review of income tax compliance and planning issues relevant to the preparation of Canadian corporate income tax returns. Participants will gain an overall understanding of tax compliance and planning issues, enhancing their ability to identify and address planning opportunities which arise in the preparation of income tax returns.

Seminar Outline
• Net income for tax purposes
• Asset transactions
• Taxable income
• Corporate relationships
• Federal corporate taxes
• Administration and disclosure
• Provincial issues

Who Will Benefit
Practitioners with regular involvement in this area have indicated the seminar is a valuable refresher and update, addressing matters they encounter in their day to day practices. Those who have been away from corporate taxes for some time will gain an understanding of the issues which may arise in corporate tax return preparation.

Prerequisite
Some basic experience with corporate tax would be beneficial, but is not essential.

Notes
This seminar deals in conceptual issues, and does not deal directly with the layout of the corporate tax return or the forms and schedules utilized in preparation of such returns nor does it focus on tax planning issues.

The seminar is structured to focus on issues encountered in general tax practice. More complex and specialized areas, such as taxation of non-residents, scientific research & experimental development, corporate restructuring and reorganization and specialized sectors such as insurance, banking and resource sectors, are beyond the focus of this seminar.

Seminar Leader/s
Brad Olsen, CPA, CA

May 18, 2016, 9am - 5pm | CPANS Learning Centre
1 Passport Day | 7 PD Hours

TAX

Taxation of Employee Benefits
PD16171251 | Reoffering

Level: Intermediate
This seminar provides a review of the income tax implications of benefits conferred on employees by their employers, including both owner-managers and employees who are unrelated to the employer.

Participants will gain an understanding of the income tax issues which arise from various types of benefits, assisting them in assessing the tax-effectiveness of various benefit plans and choices of employment benefits. Participants will also enhance their ability to advise on tax-effective employee remuneration strategies using benefit plans.

Seminar Outline
• Income tax treatment of benefits
• Employee allowances and automobile benefits
• Goods and services tax
• Loans
• Planning opportunities for key employees
• Other employee benefits
• Stock options

Who Will Benefit
The seminar is aimed at providing employers, and their advisors, with an understanding of the taxation of employee benefits in general, as well as addressing specific benefits which are either common in practice, or have unusual income tax complexities.

Prerequisite
Participants should have a basic understanding of personal and corporate taxation.

Seminar Leader/s
Greg Leslie, CPA, CA

June 13, 2016, 9am - 12pm | CPANS Learning Centre
½ Passport Day | 3 PD Hours
Instructor Biographies

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

BOBBY BOUTILIER, CPA, CA is Director of Tax Reporting & Compliance with Sobeys Inc. He focuses on corporate tax compliance, financial reporting for tax and tax planning for the national grocery retailer. Prior to joining Sobeys in 2012, Bobby was a Tax Manager at a Big Four firm. As a member of that firm’s tax group for five years he provided personal and corporate tax services to clients ranging from owner managed companies to large public corporations. Bobby has presented numerous tax topics for ICANS and other groups.

DAVID CAMERON, CPA, CA is a Senior Tax Manager with Collins Barrow Nova Scotia Inc. He has over seventeen years of experience in public accounting, and more than twelve years of experience as a full time tax practitioner. He has also worked in industry for 2 ½ years, primarily in a lead role as Director of Taxation for a large privately held corporate group focused on real estate development and investments. He has a broad range of experience managing Canadian corporate, personal, and trust taxation compliance and planning requirements for both privately held and publicly traded companies.

SHAWN CASEMORE has been helping business leaders maximize individual and group performance for over two decades. His experience includes working with organizations such as Pepsi Co, CN Rail and Winmar as well as with associations such as the Electricity Distributors Association to name a few. Shawn’s the author of “Operational Empowerment: Collaborate, Innovate and Engage to Beat the Competition” by McGraw Hill and is a recognized speaker and consultant.

JEFF CHRISTIAN, CPA, CA is a Wealth Advisor at Scotia McLeod. He currently provides investment management, financial, tax and estate planning solutions for high net worth households, owner managed businesses and other charitable organizations. In addition to presenting various topics at ICANS Jeff has been involved with the Atlantic School of Chartered Accountancy, the CICA Income Tax Practice Course and CPA Canada.

BLAIR COOK, CPA, CA, CPA (IL), MBA serves as a corporate director for a number of Canadian listed companies. As founder of the Finance Learning Academy, he also designs, develops, and delivers innovative blended learning development programs for professionals working in the fields of finance, accounting, and auditing. His interest lies in defining the path from professional to the Office of the CFO. He has fulfilled the CFO role in a number of privately held and publicly traded entities.

ROBERT DEAN, CPA, CA, CFP is a Partner with WBLI Chartered Accountants. Robert’s practice deals primarily with owner managed, entrepreneurial, businesses focusing on taxation and financial issues such as corporate and personal tax planning, estate and succession planning, reorganizations, residency issues and trusts. Robert received his CA in 1996 and completed the CICA in-depth tax program in 1999. Robert has instructed ICANS’ professional development sessions several times in the past.

LISA GALLIVAN was appointed as a part-time member of the Canadian Human Rights Tribunal in 2014. She holds a Bachelor of Commerce degree, a Masters of Business Administration and Bachelor of Laws from Dalhousie University. She has been a member of the Nova Scotia Bar since being called in 1997. Ms. Gallivan has practiced at Stewart McKelvey in Halifax, Nova Scotia since completing law school in 1996. Her practice focuses on labour and employment law including employment contracts, human rights, collective bargaining, workplace investigations, occupational health and safety, grievance arbitration and wrongful dismissal litigation. She has appeared before various courts, administrative and professional regulatory bodies and commissions. Lisa is also a presenter, trainer and facilitator providing on-site training for employees and executives on all workplace matters including facilitation of executive meetings and retreats, policy development and strategic business planning.

TERESA GANNON, CPA, CA is a Tax Manager with Grant Thornton’s Halifax office and is responsible for the provision of corporate and personal tax services for a wide variety of the firm’s clients, with emphasis on owner manager businesses. Experience includes corporate and personal tax planning, estate and succession planning, reorganizations, and trusts.

MAUREEN GILLIS, CPA, CA facilitates adult learning in topics related to leadership, success, and human behaviour. Maureen’s formal training in adult learning compliments her professional training as a Chartered Accountant, her experience teaching with various universities, and her facilitation of professional development sessions for members of professional organizations. Today, she enjoys delivering seminars to professional groups and associations on current topics of interest where she brings her practical perspective based on years of leadership experience. Currently, she also leads the HR function for a diverse team of over 500 employees. During her career, Maureen has been active in volunteer roles with organizations such as the Canadian Institute of Chartered Accountants Public Sector Accounting Board, the Institute of Chartered Accountants of Nova Scotia, Junior Achievement, the Financial Management Institute, the Chamber of Commerce, other community organizations, and has served as a volunteer financial advisor for an NGO in Ghana, West Africa.
GERRY LACROIX, CPA, CA is an assurance partner with Grant Thornton’s Halifax office with close to 20 years of public accounting experience. He is responsible for the provision of assurance services for a wide variety of the firm’s clients, with emphasis on not-for-profit organizations and owner managed businesses. Gerry is also the leader of Grant Thornton’s not-for-profit sector focus in the province of Nova Scotia and has served as a volunteer on the executive committee and board of directors for Hockey Nova Scotia since 2003.

GREG LESLIE, CPA, CA a Partner in Collins Barrow’s Halifax tax practice. Greg is involved with succession and estate planning, corporate reorganizations, tax compliance, and the charities and not-for-profit sector. A graduate of Dalhousie University where he received a Bachelor of Commerce degree, Greg was admitted into the Institute of Chartered Accountants of Nova Scotia (ICANS) in 2004. He is a current member of CAFE Nova Scotia and past president of the Halifax Estate Planning Council. Greg has completed Part III of the CICA In-depth Tax course. He is a frequent lecturer and tutor for ICANS and CICA and has presented on income tax matters to a variety of local and regional business organizations.

KEITH MARTIN, CPA, CA has experience as chief financial officer and chief operating officer of a large, privately held ICI contracting firm, where his time and efforts were equally focused on all aspects of the business, including HR, strategic planning and operations. Keith has an MBA from McMaster University. Keith is a former instructor at the School of Business and Economics at Wilfrid Laurier University.

PETER MCLELLAN, Q.C. is a Senior Partner with Stewart McKelvey’s Labour and Employment group in our Halifax office. With over 35 years experience, he frequently appears before Courts, Tribunals and other agencies on behalf of employers. Peter is a respected advisor to businesses on Labour and Employment issues including pensions and employee benefits. He is the Past President and a founding director of the Canadian Association of Counsel to Employers, designated by Lexpert as a leading practitioner in Labour, Employment and Human Rights matters and recognized by Who’s Who Legal for Canada for Management, Labour and Employment for 2011-14 and the only Nova Scotia Management, Labour and Employment lawyer inducted into the American College of Labor and Employment Lawyers. Peter is a member of the Bar of Nova Scotia and holds a Bachelor of Arts from Mount Allison University and a Bachelor of Laws from Dalhousie University.

KELLY NELSON, FCPA, FCA retired in 2014 after 30 years with High Liner Foods, as their CFO. Mr. Nelson was a Member of the Management Committee that set the strategic direction for the company and practiced in the areas of regulatory administration, corporate governance, corporate secretary, risk management, financial reporting, manufacturing accounting, tax, information technology, pension administration, treasury, business development, human resources, and investor relations, as well a leading role in M&A including negotiations, valuations, financings, due diligence, and integration activities. He has also served on non-profit boards, acting in leadership roles. He currently sits on two private company boards. Kelly is a Member of the CICA and ICANS and was President of Council (2011/2012). Mr. Nelson holds a Bachelor of Commerce (Honors) from Mount Allison University.

BRAD OLSEN, CPA, CA is a Senior Tax Manager with Grant Thornton’s Nova Scotia Business Unit. He is responsible for the provision of corporate and personal tax services for a wide variety of the firm’s clients, with emphasis on owner manager businesses. Experience includes corporate and personal tax planning, estate and succession planning, reorganizations, and trusts.

EILEEN PEASE, M.ED., CHRP, CSP, has 25 years’ experience teaching many courses related to thinking and interpersonal skills in the workplace. Recently she tapped into the most up to date knowledge on brain research to write her book “Get More Power from Your Brain” which was published in November 2014. Eileen knows how to help you get the most value out of your own creativity, thinking, decision making, willpower, reading time, concentration, and memory. Eileen also has a particular interest in mental health in the workplace. She has been certified by the Canadian Mental Health Association, Ontario branch, to teach their Mental Health Works programs. She knows that a psychologically healthy work environment supports employee engagement, recruitment, retention, productivity, effective risk management and corporate social responsibility.

STEPHEN PRIDDLE, CPA, CA, CMA worked with KPMG for five years, then moved to industry and has worked for several companies, including public and private companies in the high technology sector. During this time, he has obtained a wide range of financial reporting, treasury management, merger & acquisition and other business experience. He is currently the Vice-President, Finance and Corporate Secretary of SureWx Inc. Stephen has extensive experience in teaching professional development and other courses for different provincial institutes and has taught at the University of Toronto and Carleton University, as well as in the CMA and CGA programs.
JEREMY SCOTT, LLB is the Director of Sobey Inc.’s Sales Tax Group. Prior to accepting this role, he was a Senior Manager with Grant Thornton LLP in Halifax, focused in the area of sales tax. Specifically, Jeremy has experience dealing with the Federal Goods and Services Tax (GST and HST), Provincial Sales Tax, Excise Tax, Tobacco Tax, Fuel Tax, and Gasoline Tax. He has written articles for tax publications and has presented at a number of commodity tax conferences, seminars and professional development workshops.

JON TATTRIE was recruited in 2012 by veteran Dynamic Learning teacher Barry Boyce to continue his work training professionals to write clearly and effectively. Jon has spoken about writing at the University of King’s College and Dalhousie University, as well as to students across the province via the Writers in the Schools program. He is the award-winning author of one novel and two non-fiction books and has won three Atlantic Journalism Awards (silver). He is a consultant for Pottersfield Press and an editor for the Canadian Encyclopedia. He writes for Reader’s Digest, Canadian Geographic, Saltscapes, the Chronicle Herald, Progress Magazine and many others. He also works as an online, radio and TV journalist for CBC. Jon is a former vice-president of the Writers’ Federation of Nova Scotia.

DAVID TRAHAIR, CPA, CA, is a financial trainer, national best-selling author and CPA Magazine columnist. His other books include Smoke and Mirrors: Financial Myths That Will Ruin Your Retirement Dreams, Enough Bull: How to Retire Well Without the Stock Market, Mutual Funds or Even an Investment Advisor, Crushing Debt: Why Canadians Should Drop Everything and Pay Off Debt and Cash Cows, Pigs and Jackpots: The Simplest Personal Finance Strategy Ever. He is known for his ability to explain the often-confusing world of personal finance in plain English. Canadians appreciate his no-nonsense style and the fact that his views are totally independent because he does not sell any financial products. He currently operates his own financial training firm and offers seminars on his books to organizations including CPA provincial institutes in B.C., Alberta, Saskatchewan, Manitoba, Nova Scotia, Ontario and Bermuda.

CHRIS TRENAMAN, CPA, CA is an assurance principal with Grant Thornton’s Halifax office with over 11 years of public accounting experience. He is responsible for the provision of audit and advisory services for a wide variety of the firm’s clients, with emphasis on not-for-profit organizations and pension plans.

JANE VELDHOVEN, CPO® (Certified Professional Organizer) and founder of Get Organized! Professional Services was honored with the 2014 Harold Taylor Award for dedication to her industry and is true leader in Canada. For more than twelve years she has been working with busy professionals to help them manage their time and space in a more effective and efficient manner. Jane has a great affinity with accountants and business owners alike and has a deep understanding for the challenges associated with a billable hour environment. She helps her clients spend more time on revenue generating activities by introducing concepts, systems and processes for maximum productivity. A previous workshop participant says, “Many thanks for the excellent tips today Jane, I am looking forward to implementing them, saving time, and feeling more in control. I love your energy, you are an excellent presenter.”

MARA VIZZUTTI B.ED, MA, is a seasoned facilitator and a certified executive coach. Originally from western Canada, Mara has been working in the field of leadership development since 1996. For over 20 years, she has been facilitating high caliber trainings to audiences of senior executives, supervisors and front line employees in diverse industries. During the course of her career, she has completed numerous training programs including a Master’s degree in Organizational Development and Leadership. Prior to her facilitation career, Mara enjoyed a successful career in sales and management. Mara’s areas of expertise include: team building, leadership development, transformational coaching and effective communication systems. Mara works with organizations to improve engagement showing leaders how to communicate effectively and successfully develop their future leaders. She is committed to creating more collaborative, inspiring work environments where people feel engaged. Her goal is to transform the process of business communications and to facilitate collaboration and healthy relationships in the workplace.

BRYAN WHALEN is a Tax Senior Analyst with Grant Thornton’s Halifax office. He is a tax specialist as he completed the 3 year In-depth tax program. His responsibility is for the provision of corporate and personal tax services for a wide variety of the firm’s clients, with emphasis on owner manager businesses. Experience includes corporate and personal tax planning, in bound non-resident, succession and estate planning, reorganizations, and trusts.
Live Broadcasts

Live broadcast seminars are delivered live and can be accessed anywhere you have access to the internet. Participants watch the seminar leader deliver the seminar, and have the PowerPoint presentation on their screen at all times. A live chat option allows online participants to submit questions, so you will always feel like you are a part of the room.

**The Procrastinator's Guide to Retirement**  
**LB16170071 | Level: Introductory**

Let's face it, planning and saving for retirement is not easy. We are told that the earlier we start the better, and that the “magic of compounding” will make our dreams come true.

But for most people it’s simply not possible. In our 20s, 30s and 40s, we are busy paying for our housing, our cars, our kids and all the other costs of raising a family. Out of necessity we become procrastinators when it comes to saving for retirement.

But there is hope. This course will take you step-by-step though planning and saving for retirement starting in your 50s and the best way to fund your retirement years. It is an easy-to-follow plan for retirement in ten years or less.

**Topics Include**

- Your pre- and post-retirement investment strategy: What products are best now and later?
- Receive and work with an easy-to-use Excel spreadsheet called “The Procrastinator’s Number Cruncher” to optimize the use of excess cash (RRSP, TFSA or pay down the mortgage, etc.), and maximize your retirement income.
- Retirement funding options: Your CPP and OAS pensions or what age to start, how to calculate how much you’ll get, the new OAS rules and how to optimize both plans.
- RRIF vs. annuity: how RRIFs and annuities work, the advantages, disadvantages of each, a suggested strategy and current annuity rates.
- Old age healthcare planning: what the government covers and what it doesn’t, long-term care facility options.
- Your home as a source of funds: reverse mortgages and other options.
- Tracking your spending: the key step to retirement planning that most people don’t do. Learn how to do it easily, automatically and for free.
- Special situations: divorce - the basics from a financial perspective, inheritance - a simple check-list you can print to have your parents fill in to make the transfer efficient, your credit card strategy - an analysis of current travel reward and cash back cards to optimize your benefits, car lease vs. buying - the advantages and risks of leasing and use of a spreadsheet to make the decision.

**Who Will Benefit**

People approaching retirement who want to ensure it is comfortable and stress-free.

**Seminar Leader/s**

David Trahair

May 12, 10am - 5:30pm  
1 Passport Day | 7 PD Hours

**Enough Bull - How to Retire Well without the Stock Market, Mutual Funds or even an Investment Advisor**  
**LB16170031 | Level: Introductory**

The stock market crash of 2008 has proven one thing: traditional retirement planning advice simply doesn’t work. The risks are too enormous. Trusting the stock market is like gambling with your family’s future. But how do you plan for retirement without risking everything? The answer is simple and it will be laid out in this course. Join author David Trahair, CPA, CA as he gives you the non-traditional view to money management that your investment advisor may not.

**Topics Include**

- The Laddered GIC Strategy. We’ll explore how to use a strategy of rolling over shorter term GICs to five-year GICs to maximize your retirement savings with zero risk. We’ll also look at historical returns using this strategy versus the stock market.
- The Canada Pension Plan. We’ll use a simple checklist to help you make the decision about when to elect to start receiving the CPP pension (as early as age 60) incorporating the new rules regarding the early election penalty etc.
- Can anything beat an RRSP? We’ll compare equity investing in RRSPs versus outside in a regular investment account, TFSAs, rental properties and retaining earnings in a corporation.
- Getting out of mutual funds. Mutual funds are simply too expensive in Canada today. That is why I got out of them altogether. I’ll show you how you can too - as quickly and painlessly as possible.
- The “Tax Turbo-Charged RRSP”. We’ll work through the numbers to compare the traditional advice to invest in RRSPs each and every year, to waiting until later in life, when all debt is gone. We’ll see that it may be possible to beat the old way by starting late and still use only 100 per cent safe GICs using all that unused RRSP room that has built up over the years.

**Who Will Benefit**

Professionals who are interested in helping their friends, family and clients to retire well without having to take risks.

**Learning Outcomes:**

You will learn a strategy for retirement that reduces your risk and perhaps changes the way you think about investing.

**Notes:**

Each attendee will get an electronic copy of David’s book Enough Bull: How to Retire Well without the Stock Market, Mutual Funds, or Even an Investment Advisor as well as his “Money Maximizer” spreadsheet that helps you to compute you and your family’s combined taxable income, income taxes and resulting after-tax cash.

**Seminar Leader/s**

David Trahair

June 1, 10am - 5:30pm  
1 Passport Day | 7 PD Hours
Human Resources for Financial Professionals - Steering the Organization Away from Trouble
LB16170051
Level: Intermediate
This seminar highlights a broad range of human resources issues and pitfalls, and provides participants with a high-level overview of provincial legislation and current issues as it pertains to the employee-employer relationship in Ontario. The content takes you through the employee lifecycle, beginning with recruiting and hiring, through to termination. Along the way, the instructor will provide you with practical guidance on best practices based on his experience in the HR and finance function areas in small- to medium-sized companies. The information in this seminar is not intended to replace the need for competent legal advisors but rather to help you to identify HR issues and provide some guidance that might allow you as a financial or accounting executive to help steer your organization away from trouble.

Topics Include
• Key interview techniques
• The employment cycle: recruiting, hiring and termination
• How to develop an employee handbook and HR best practices for an organization
• Leaves, hours of work, sickness and absenteeism
• Workplace computer and technology issues
• An overview of the Employment Standards Act (ESA)

Who Will Benefit
Financial and accounting professionals who have a dual finance and HR responsibility but might not have a true HR department in their organization, and have limited or no formal HR training or experience.

Seminar Leader/s
Keith Martin

June 2, 10am - 5:30pm
1 Passport Day | 7 PD Hours

Facilitative Leadership - Empower Your Employees for Increased Productivity
LB16170041
Level: Intermediate
Leadership can be a daunting task. Balancing our own business and personal objectives while managing a team of unique individuals can be draining mentally and emotionally. With little time available to spend with staff, the real question becomes how can we get staff to do more, care more, and be present? The secret is empowerment, and to achieve empowerment leaders need to shift from being directive to being facilitative. By becoming a more facilitative leader we can develop our employees in a team environment, driving higher levels of communication, understanding and productivity.

Join a powerful session devoted to helping leaders get more done with and through employees, motivating them in the process. In this talk we will explore the greatest time constraints, variables that challenge employees, helping leaders formulating a proven approach to building empowerment to further develop employees and the team.

Topics Include:
• The distinct difference between a facilitative leader and today’s typical leader.
• Proven approaches to introduce and sustain higher levels of empowerment in employees
• Methods to apply delegation in order to improve employee responsibility and team strength
• How to use coaching and mentorship to increase employee autonomy and productivity

Seminar Leader/s
Shawn Casemore

July 13, 10am - 5:30pm
1 Passport Day | 7 PD Hours
Business Continuity - Best Practices for Managing the Risks  
LB16170011  
Level: Intermediate  
Are you and your team members prepared for a business disruption? Natural disasters, technology glitches, human failures, and even sabotage and terrorism threaten businesses of all sizes today. In this course, you will learn how to develop and implement a business continuity plan (BCP) to help manage the risks associated with business interruptions. You will learn how to manage key issues related to staffing, how virtualization can speed recovery times, and how Cloud-based storage, synchronization, and mirrored databases can help ensure that you always have access to your critical data and applications. Most importantly, you will learn how to identify your organization’s major risks and create an effective plan to address these contingencies.  
Today’s technology-dependent organizations must have a plan for how they will operate when facilities, power, communications, or technology fail or become compromised. Unfortunately, many companies learn about critical weaknesses in their infrastructure only after experiencing a critical outage. Participate in this course and learn how to identify, understand, and develop strategies for mitigating critical business interruption risks.  
Learning Objectives  
Upon completing this course, you should be able to:  
• Define the goals and activities involved in the creation of a Business Continuity Plan (BCP), and contrast a BCP with a data backup strategy  
• Identify and assess critical risks to a company’s operations  
• Classify identified risks into four timeframes for creating disaster recovery plans  
• Define three different types of data backups and explain the critical differences in how each is created and stored so that it can achieve its desired purpose  
Who Will Benefit  
Business professionals who desire to reduce the risk associated with business disruptions  
Seminar Leader/s  
Ward Blatch  

July 14, 10am - 1:00pm  
½ Passport Day | 3 PD Hours

Do It Yourself Business Intelligence  
LB16170021  
Level: Intermediate  
Perhaps no term receives more coverage in business circles today than “business intelligence (BI).” With Microsoft’s “Power BI” desktop, you can now create powerful, interactive, and visually compelling summaries of potentially vast quantities of data directly from your computer and without the assistance of your technology team. In this course, you will learn how to use Microsoft’s Power BI Desktop to solve many of the financial and operational reporting issues you face each day.  
Using “do it yourself business intelligence,” provided by Power BI Desktop, you will quickly and easily create reports and dashboards that might have taken days or even weeks in the past. With the knowledge you glean from these reports and dashboards, you will have insights into your data that can help you make more informed and profitable decisions while still retaining full control over your data. Perhaps best of all, most Excel users will be able to implement Power BI Desktop without using Excel and without any additional investment in hardware or software!  
Learning Objectives  
Upon completing this course, you should be able to:  
• Understand what “Business Intelligence” is and where “Business Intelligence” is useful  
• Learn the components of “Microsoft Power BI”  
• Learn how to acquire “Power BI Desktop”  
• Utilize the Connect Query window to extract financial and operational data from multiple data sources  
• Understand the three views in Power BI Desktop: Report View, Data View, and Relationships View  
• Learn how to Shape your data in the Query Editor  
• Prepare stunning, interactive visualizations of data using the Report View  
• Publish your “Power BI” reports and collaborate with team members using tools such as Power BI Sites  
• Understand how to access “Power BI” reports from mobile devices  
• Use Power BI’s Q&A feature to “ask” natural language questions of your BI reports and dashboards  
Who Will Benefit  
Business professionals who are seeking to improve decisions by creating interactive BI reports.  
Note  
Students who want to work along with the instructor will need to download Power BI Desktop from https://powerbi.microsoft.com/en-us/desktop.  
Seminar Leader/s  
Ward Blatch  

July 14, 2pm - 5:00pm  
½ Passport Day | 3 PD Hours
E-Learning

Interactive On-line Seminars

CPA Nova Scotia is pleased to continue to offer the following two-day seminars converted into two-month interactive online modules. Past participants have perceived this innovative, cutting-edge alternative to classroom learning as a great success. Many feel that this convenient, economical and interactive seminar delivery is a perfect alternative for those having difficulty attending our seminars, or who want to experience a new and innovative way of learning.

Learning outcome
Prior to the session commencement, you will be given password access to the online courseware via e-mail. Within this courseware, you will find instructions on how to work through the session, all necessary seminar materials, as well as a range of interactive learning activities designed to make studying on the Internet a rich and relevant experience. You will also benefit from:

• immediate access to relevant articles and information sites
• the opportunity to share ideas with or pose questions to other participants and a session facilitator
• an index feature that allows for direct access to specific topic area within the session
• case study discussions
• current on-line updates as they happen
• access to an expert and access to technical support

Each session will be offered in module format. Access to the expert (instructor) online will be available over eight weeks.

How to Get Started with the Interactive On-line Seminars
1. ensure you have access to a computer (meeting the minimum basic requirements), the internet, and possess basic computer skills
2. submit registration form with payment and ensure that you provide an email address
3. “Getting Started” instructions will be emailed to you along with the link to the seminar website and your Login ID and Password
4. simply clicking the link and then supplying your ID and Password when prompted will enable you to access the course site.

Internet hours
You have two options for managing your Internet hours while working on these sessions:

• Study entirely online using the electronic courseware provided
• Study part-time online by reviewing seminar materials you download in a PDF document

While the suggested CPD credit hours for an E-Learning session is 14 hours since this covers the same material as the 2-day classroom course, CPA Nova Scotia understands that more time can be spent in self-study, which may be considered as structured CPD credit if you complete the on-line quizzes as evidence of completion. Participants should track and record the actual time spent.

ASPE: A Survey of the Standards
DL16170011 | Level: Intermediate
This new seminar replaces the CICA Handbook Accounting Refresher. Its main objective is to provide a detailed review of ASPE, and is designed for individuals seeking an in-depth, detailed review of ASPE. The material is not a comparison of ASPE to IFRS or GAAP, and will cover only ASPE. However, given that 95% of the corporate entities in Canada are private, the course does have broad appeal and is equally applicable to non-corporate private enterprises. Individuals who have been detached from Canadian standards in recent years may especially find this course beneficial to regain a strong technical accounting base. All ASPE Handbook sections will be reviewed and discussed in the material together with an introductory module discussing the changeover from GAAP to ASPE.

CAS Auditing Refresher
DL16170021 | Level: Introductory
The new Canadian Auditing Standards (CASs) become effective for periods ending on or after December 14, 2010. This course will provide participants with a solid foundation in the practical application of the CASs in the new auditing environment. You will learn an introduction and overview of the new CASs; how to perform an audit in the new CAS environment; and the key elements of an engagement working paper file.

IFRS: A Survey of the Standards
DL16170031 | Level: Introductory
This seminar provides participants with a solid introduction to the International Financial reporting Standards (IFRSs) that have come into effect in Canada in 2011. IFRSs that are under development at the IASB with expectation for introduction after changeover will also be reviewed. Not all IFRSs are covered. Focus is on the IFRSs that apply to most profit-oriented entities that are different from Canadian GAAP. Note that this seminar is not a direct comparison with Canadian GAAP.

Income Tax Refresher for Corporate Tax
DL16170041 | Level: Introductory
This seminar provides an excellent overview and general refresher on corporate income tax matters. The primary target audience for this seminar is CPAs who do not work with the Income Tax Act regularly, but who wish to refresh their knowledge on the status of current tax topics. The seminar emphasizes matters of interest to owner-managers and small business in a public practice context. Case studies are used to illustrate some of the tax concepts.

Income Tax Refresher for Personal Tax
DL16170051 | Level: Introductory
This seminar provides an excellent overview and general refresher on personal income tax matters. The primary target audience for this seminar is CPAs who do not work with the Income Tax Act regularly, but who wish to refresh their knowledge on the status of current tax topics. The seminar emphasizes matters of interest to owner-managers and small business in a public practice context. Case studies are used to illustrate some of the tax concepts.
PD AudioWeb

Web-Based and Eligible for Verifiable CPD Hours!
PD AudioWeb are direct recordings from live PD seminars.
These recordings are available as downloadable MP3 audio files, along with any corresponding handout materials in PDF files, from our website.
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*Please note that these sessions are audio recordings from presentations authored in BC and presented to a BC audience. As such, the content of some titles, particularly those based specifically on BC Acts, may not be as relevant to all members.
The Canadian Payroll Association

The Canadian Payroll Association (CPA) delivers comprehensive education for business professionals who have a functional responsibility for payroll and has represented the payroll community since 1978. CPA seminars will help members and their staff enhance and adapt payroll operations, meet new legislative requirements, address changing workplace need and take advantage of emerging technologies. The CPA Professional Development Series of seminars provide accurate, up-to-date knowledge of the payroll function in Canada.

Employment Standards

CP16170011 | Level: Advanced | May 6
Finding the right information on Employment Standards in each jurisdiction can be challenging. This compliance seminar provides you with an in-depth understanding of employment standards legislation in every province—in plain language. Get the latest legislative updates and valuable tips to help you stay compliant and avoid litigation on topics such as: determining and calculating hours of work (overtime, compressed work weeks and averaging hours); statutory holidays and vacations; processing paid and unpaid legislative leaves (sick leave, maternity, parental, bereavement, etc.); and terminations.

Who should attend?
This seminar is a comprehensive introduction to the standards of employment across Canada that impact the day-to-day payroll operations and administration for payroll practitioners, human resources practitioners, office managers and other business professionals responsible for payroll.

Payroll Accounting: Basic Principles

CP16170021 | Level: Introductory | June 2
There are many facets of payroll accounting from general ledger postings to labour cost distribution and bank account reconciliation to segregation of duties. Each has its own need and purpose. One thing for sure is that understanding proper accounting methods is an essential skill for the payroll practitioner.

This full day seminar is packed with hands on practical examples and exercises of the complete payroll accounting cycle, which includes step-by-step instructions on recording journal entries; accounting for accruals and reversals; reconciling payroll expense and liability accounts; reconciling payroll bank accounts; and so much more.

Who should attend?
This introductory professional development seminar is perfect for those new to payroll, experienced payroll practitioners, payroll analysts, and specialists, or if you oversee the payroll department, if you are responsible for reconciling payroll accounts and journal entries, or if you might simply need to gain an understanding of payroll accounting; this seminar will provide you with the knowledge and skill required to excel at your accounting responsibilities within the payroll function.

Payroll Essentials For Accounting & HR Professionals

CP16170031 | Level: Introductory | July 14
This seminar is designed for accounting and human resource professionals who have a functional responsibility to oversee the payroll function but are not actually processing a payroll. It provides an introduction and overview perspective of the payroll function. Participants will learn about processing and reporting requirements, and payroll practitioners’ responsibilities with regard to government statutory withholding and remittance.

Who should attend?
• Payroll and other business professionals who need to ensure they are complying with the requirements of the ROE
• Human Resources and office managers, and other business professionals with a functional responsibility for payroll.

Special Payments & Completing The ROE

CP16170041 | Level: Compliance | June 23
This seminar is designed to provide a comprehensive overview of the payroll implications of special payments that fall outside of the norm in processing payroll. The program also deals with the intricacies of the correct completion of the Record of Employment (ROE).

Who should attend?
• Payroll and other business professionals who need to ensure they are complying with the requirements of the ROE
• Human Resources and office managers, and other business professionals with a functional responsibility for payroll.

Location: Chateau Bedford, 133 Kearney Lake Rd, Halifax from 8:30am - 4:30pm 1 Passport Day | 7 PD Hours
7 PD Hrs Cost: $399
*Passport Discount $140, counts as 1 passport day
CPA Canada Professional Learning and Development

CPA Canada Professional Learning and Development provides an extensive portfolio of training and professional development products that delivers new skills, knowledge building and enhanced competencies. The programs are designed to meet the CPD requirements for Provincial Accounting Bodies and other professional associations.

For additional information, visit: cpacanada.ca/2016events

INCOME TAX

In-Person Courses
- In-Depth Tax Course
  Registration opens July 6, 2016
- In-Depth International Tax
  September 17-21, 2016 | Niagara Falls, ON
- In-Depth Transfer Pricing Course
  September 26-28, 2016 | Toronto, ON
- Income Tax Practice – West
  Fall 2016 | Western Canada
- In-Depth Corporate Reorganizations
  Fall 2016 | Eastern Canada
- In-Depth Tax Issues for the Owner-Managed Business
  Fall 2016 | Western Canada
- In-Depth Tax Disputes
  Fall 2016 | TBD
- Income Tax Practice – East
  Fall 2016 | Eastern Canada
- Advanced International Tax
  Fall 2016 | Eastern Canada

Blended Learning
(Elearning and/or in-person)
- Indirect Taxes
- Scientific Research and Experimental Development
- U.S. Tax for the Canadian Tax Practitioner
- Accounting for Income Taxes

ELearning
- Transfer Pricing Elearning Course
- Practical Aspects of Business Valuations
- Capital Gains
- Income Taxes and the CCPC
- Personal Tax Update 2015/16
- Personal Services Business
- Think Strategically and Act Decisively
- Excel Dashboards: Developing Insight in Your Organization
- Personal Cash Flow Planning for Accounting Professionals

INDIRECT TAX

Conferences
- Commodity Tax Symposium
  October 24-25, 2016 | Toronto, ON
- Forum on US State and Local Taxes for Canadian Companies
  October 26-27, 2016 | Toronto, ON

In-Person Courses
- In-Depth HST/GST Course
  May 29-June 3, 2016 | Niagara Falls, ON

Elearning and/or In-Person - Specialized HST/GST Courses:
- Financial Services
  May 9-10, 2016 | Toronto, ON
- Cross-Border Transactions
  May 11-12, 2016 | Toronto, ON
- Public Sector Bodies
  May 26-27, 2016 | Toronto, ON
- Real Property (elearning only)

PUBLIC SECTOR

Conferences
- Public Sector Conference
  October 12-13, 2016 | Ottawa, ON

In-Person Courses
- Public Sector Financial Reporting and Accounting
  May 16-18, 2016 | Toronto, ON

LEADERSHIP, STRATEGY AND MANAGEMENT ACCOUNTING

Conferences
- Conference for the Oil and Gas Industry
  November 23-24, 2016 | Calgary, AB
- Conference for Audit Committees
  December 6-7, 2016 | Toronto, ON

Workshop
- Translating Strategy into Action: A Guide for Senior Not-for-Profit Leaders
  May 30-31 & August 24-25, 2016 | Toronto, ON

CERTIFICATES
- Emerging Leaders Certificate Program
- Excel Certificate Program
- IFRS Certificate Program
- Fundamentals of Forensic Accounting Certificate Program

Jointly presented with CPA BC

The ONE 2016
CPA Canada’s National Conference
September 19-20, 2016
(optional workshops September 21)
Vancouver Convention Centre, Vancouver, BC

cpacanada.ca/TheONE

Note: All events, dates and locations subject to change.
Executive Leadership Programs (CPA Alberta)

TAKE THE LEAD! Designed to take you beyond the technical. CPA Alberta offers two premiere Leadership Programs to elevate the performance of financial professionals. These programs build on your current knowledge base, going beyond your technical accounting and financial expertise to give you the competencies you need to successfully lead others, lead teams, lead the financial function and lead organizational transformation. Spend a week in Banff, away from the office, and focus on your career.

This intensive program is designed for CFOs and aspiring CFOs who are determined to move their career and their organizations forward. The CFO Leadership Program builds on core financial skills and prepares executives for the next step in their career. Participants have included Chief Financial Officers, Vice Presidents of Finance, Vice Presidents of Operations, Directors of Accounting, Directors of Finance, Senior Controllers, and Treasurers.

May 2017 dates to be announced – Banff, AB

For more information go to: www.cfoleadership.ca or e-mail cfoleadership@icaa.ab.ca

Controllership Program

In today’s business environment, controllers must add value to their organizations by balancing core financial responsibilities with strong leadership abilities. Senior financial managers today face greater challenges than ever before—and greater opportunities. The Controllership Program is designed to give you the leadership tools you need to successfully meet these challenges.

This program is designed specifically for controllers and financial professionals who want to move their career and their organization forward. The program is ideal for individuals currently employed as controllers, or aspiring to the role, who want to make a difference and have a leadership influence beyond their financial expertise.

November 19 – 25 2016 – Banff, AB

For more information go to: www.controllership.ca or e-mail controllership@icaa.ab.ca

Blended/ Online

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Executive and Professional Development Opportunities

CPA NS Members Receive 10% Discount

When making your professional development plans this year, consider the additional option of a Saint Mary’s University Executive and Professional Development seminar. Through a program with CPA NS, members in good standing will receive a 10% discount on any seminar offered by Saint Mary’s University Executive and Professional Development.

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