

CA⁴

PASSPORT
DEADLINE
May 11th



*2012 SPRING/SUMMER
Continuing Professional
Development*

Spring 2012

Dear ICANS Members:

Welcome to the 2012 Spring/Summer Continuing Professional Development (CPD) brochure, featuring a number of informative, relevant and affordable options for you to grow and develop as a professional.

NEW THIS YEAR! - ICANS can now accept event registrations on-line. To register on-line go to www.icans.ns.ca, on the welcome page click on the "**Member Login**" button. The first time you login you will need to set-up your account; your username is your 6 digit CICA number **without the C**, located on your fee invoice in the address box **Reference#** or on your CA Magazine wrap, (this will be your ICANS member number on a go forward basis). Initially, you will also need to set up your password by clicking on "**Reset My Password**". Please ensure you use the preferred email address that you use to receive emails from ICANS. You will then receive an email prompting you to create your password.

If you need assistance or have any questions regarding this process, please contact Danielle Roode, ICANS Membership Registrar at 425-3291 ex. 31 or droode@icans.ns.ca.

This calendar includes a wide breadth of timely topics through in-class continuing professional development titles and many additional PD opportunities, as well as, E-Learning sessions. This brochure contains many re-offerings of the fall/winter sessions that were well attended, plus a few new titles such as "**PSAB 101**" (page 12), "**Communication Skills Using the Myers-Briggs Type Indicator**" (page 14), "**Developing Resilience in a Healthy, Productive Workplace**" (page 15), "**Maximizing Your Leadership Potential**" (page 16) and 4 new information technology titles (pages 21 & 22), just released! Also added to the offerings is a new E-Learning title "IFRS: A Survey of the Standards" (page 26), which may be a very convenient way to fulfill a portion of your verifiable PD requirement.

Of course, your choices aren't limited to just half, full or two-day sessions; for the second year, we are offering a new 3 day CEO Conference "**Smart Leaders: Thinking and Innovation Skills**" (page 9) scheduled from Oct. 16 through 18, presented by Dr. Jim Murray who has been helping participants advance their careers for almost 40 years.

ICANS reminds you that our Personal and Organization Passports are your most cost-effective payment alternative. Passports are on sale now until May 11th, 2012.

If you have any questions or concerns please feel free to contact me at (902) 425-3291 ext. 23 or email kslaunwhite@icans.ns.ca or for registration questions, contact Danielle Roode at droode@icans.ns.ca.

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

Kathie Slaunwhite
Director, Professional Development

ICANS 2012 SPRING/SUMMER PD OPPORTUNITIES

TABLE OF CONTENTS

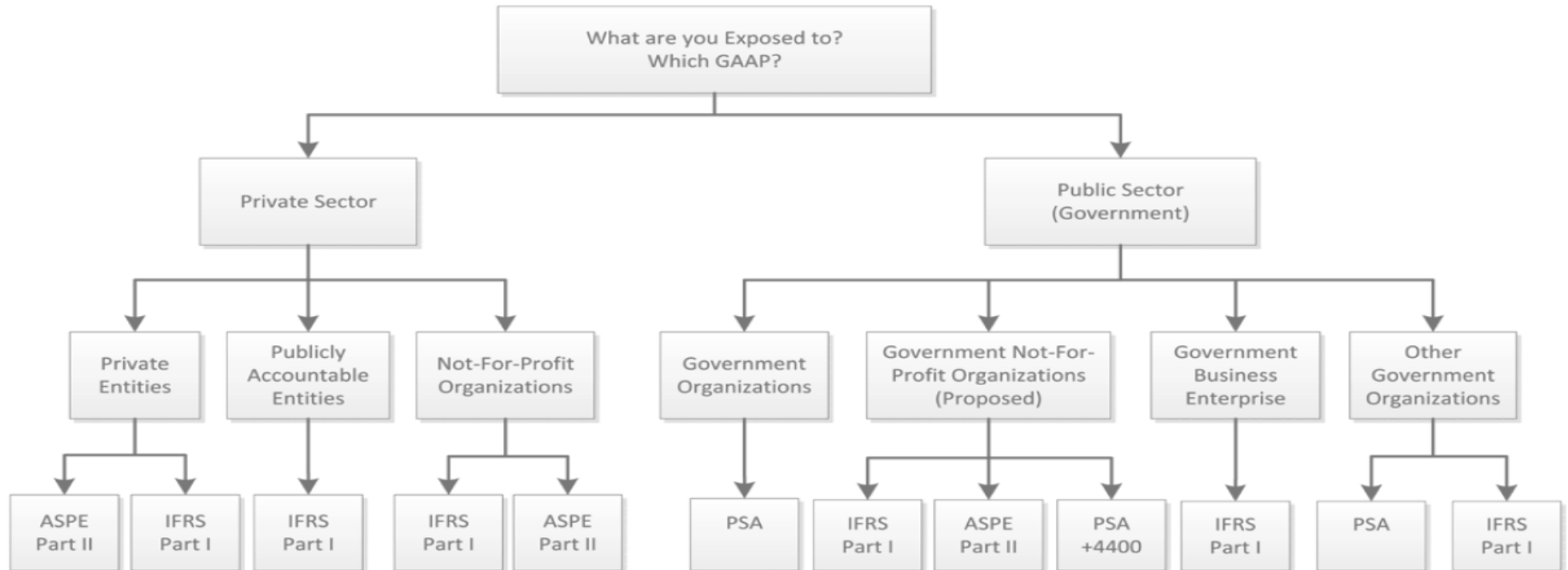
TABLE OF CONTENTS	1
LEARNING PATH	2
2012 SPRING/SUMMER CALENDARS.....	4
COMMENTS AND SPECIALIST DESIGNATION INFORMATION.....	5
PRICING INFORMATION	6
REGISTRATION INFORMATION AND CONDITIONS	7
CEO CONFERENCE - SMART LEADERS: THINKING AND INNOVATION SKILLS.....	9
ACCOUNTING.....	10
Accounting, Auditing & Professional Practice Update.....	10
ASPE: A Survey of the Standards.....	10
ASPE: The Transition.....	11
IFRS – Update.....	11
Not-for-Profit Organizations – Transition to the NEW Accounting Standards (Part III)	12
PSAB 101	12
ASSURANCE	13
Auditing in the New CAS Environment	13
FINANCE	13
Financing Strategies	13
PROFESSIONAL AND PERSONAL SKILLS	14
Communication Skills Using the Myers-Briggs Type Indicator	14
Defining and Managing Projects.....	14
Developing Resilience To Depression In The Workplace	15
Effective Communication Skills for Outstanding Performance	15
Maximizing Your Leadership Potential	16
Working Effectively with Multiple Generations	16
TAXATION	17
Catching Up: 5 Years of Income Tax Developments	17
Eligible Dividend Regime	17
Everyday Income Tax Issues For The General Practitioner.....	18
Income Splitting	18
Income Tax Refresher for Corporate Tax Planning.....	19
Practicing Safe Tax.....	19
Tax Issues for Private Corporate Groups	20
Taxation of Employee Benefits.....	20
INFORMATION TECHNOLOGY	21
Charting with Microsoft Office Communicate More Effectively!.....	21
Excel Reporting – Best Practices, Tools and Techniques.....	21
Excel Tables - Revolutionize How You Work with Excel!	22
Office 365	22
Computer Applications Training	23
PD ON AUDIO	23
INSTRUCTORS BIOS.....	24
E-LEARNING	26
ASPE: A Survey of the Standards	26
Auditing in the New CAS Environment	26
IFRS: A Survey of the Standards	26
Income Tax Refresher for Corporate Tax Planning.....	26
Income Tax Refresher for Personal Tax Planning	26
ADDITIONAL PD OPPORTUNITIES.....	27
The Canadian Payroll Association.....	27
CICA Continuing Education 2012.....	28
Executive Development Programs	29
Executive Leadership Programs.....	30
MBA Financial Services At Dal.....	30
Executive and Professional Development Opportunities.....	30
FAQs.....	31
CPD REQUIREMENTS AND CA COMPETENCY	32
CONTINUOUS LEARNING ACTIVITIES WORKSHEET (CPD LOG).....	33

Accounting, Auditing and Professional Practice Update and Accounting Update Courses

The following chart will help you assess your needs based on your own circumstances. Please Note: these comments address only Accounting and Assurance seminars - please see the rest of the PD catalogue for other topics. It is recommended that all professional accountants familiarize themselves to some degree with all the accounting and auditing changes. First, you need to assess which GAAP(s) and which part of the CICA Handbook are relevant for your organization or your clients. Once you have determined that, you will need to determine which part of the CICA Handbook contains the applicable standard. The CICA Handbook – Accounting has been restructured due to the adoption of different sets of standards for different categories of entities. The structure is as follows:

- Part I – International Financial Reporting Standards (now available)
- Part II – Accounting Standards for Private Enterprises (now available)
- Part III – Accounting Standards for Not-for Profit Organizations (now available)
- Part IV – Accounting Standards for Pension Plans
- Part V – A complete set of the existing handbook contents (now available)

If you are dealing with the public sector – federal, provincial, territorial and local governments, government organizations, government partnerships, and potentially school boards – the applicable standards may be contained in the CICA Public Sector Accounting Handbook (PSA). Once you have determined which GAAP(s) are relevant for your organization or your clients you can then look at what PD seminars are available. First, you need to assess which GAAP(s) are relevant for your organization or your clients:



Which Courses are Applicable to You?

Title	Practitioners (no Audits)	Practitioners (with Audits including NFPOs, no public companies)	Practitioners (with Audits, including NFPOs and/or public companies)	CAs in industry (Private Companies)	CAs in industry & G-BE (Public Companies)	Compe tency	No. of Days*	Page #
Accounting, Auditing & Professional Practice Update	√	√				FR/AS	1	10
ASPE: A Survey of the Standards	√	√	√	√		FR	1	10
ASPE: The Transition					√	FR	0.5	11
IFRS – Update					√	FR	1	11
Not-For-Profit Organizations – Transition to the NEW Accounting Standards	√	√	√			FR	0.5	12
PSAB 101					√	FR	1	12
Auditing in the New CAS Environment		√	√			AS	2	13

Financial Reporting

Assurance

* These courses may be taken over a number of years, i.e. If you took *IFRS – Focus on Property, Plant & Equipment, Intangible Assets and Impairment of Assets* last year, you don't need to retake it!

FR
AS



ICANS 2012 SPRING/SUMMER PD OPPORTUNITIES

2012 SPRING/SUMMER PD CALENDARS

MAY 2012

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
21 Holiday	22	23	24 Income Tax Refresher for Corporate Tax Planning - 2 days PD12130181	25 Income Tax Refresher for Corporate Tax Planning - 2 days PD12130181
28 Defining and Managing Projects PD12130091	29 Communication Skills Using the Myers-Briggs Type Indicator PD12130271		31	

JUNE 2012

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
4 am Eligible Dividend Regime PD12130151	5 am Practicing Safe Tax PD12130191	6 am Excel Reporting – Best Practices, Tools and Techniques PD12130231	7 am Office 365 PD12130251	8
pm Not-for-Profit Organizations – Transition to the New Accounting Standards (Part III) PD12130051	pm Income Splitting PD12130171	pm Excel Tables – Revolutionize How You Work with Excel! PD12130241	pm Charting with Microsoft Office – Communicate More Effectively! PD12130221	
20 Working Effectively with Multiple Generations PD12130131	12 Catching Up: 5 Years of Income Tax Developments PD12130141	13 ASPE: A Survey of the Standards – 2 days PD12130021	14 ASPE: A Survey of the Standards – 2 days PD12130021	15
Maximizing Your Leadership Potential PD12130121				
18 PSAB 101 PD12130061	19 am Tax Issues for Private Corporate Groups PD12130201	20 Everyday Income Tax Issues for the General Practitioner PD12130161	21 Effective Communication Skills for Outstanding Performance PD12130111	22
	pm Taxation of Employee Benefits PD12130211			
25 Financing Strategies PD12130081	26 Developing Resilience To Depression In The Workplace PD12130101	27	28	29

JULY 2012

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
2 Holiday	3	4	5 Auditing, Accounting and Professional Practice Update PD12130011	6 am ASPE: The Transition PD12130031
				pm IFRS – An Update PD12130041
9 Auditing in the New CAS Environment – 2 days PD12130071	10 Auditing in the New CAS Environment – 2 days PD12130071	11	12	13



Comments from previous offerings:

“The course was very informative and will provide excellent reference material” • The instructor “is very well informed and has an excellent presentation style” • “Good update on what has to be done and when with the new standards” • “Great resource material” • “Is timely and of important significance to anyone performing audits.”

- Auditing in the New CAS Environment

“Good overview of recent changes and a head's up on what is coming.” • “Keeping up to date on the various sets of standards that currently exist and the current developments in those standards.” • “Excellent overview of changes.”

- Accounting, Auditing and Professional Practice Update

“Covered the transition issues relating to NPOs.” • “The binder with all the examples and details on the transitions and what choices (i.e. fair value option for capital assets) your organization can make, will be very helpful as we move forward with the new standards.” • “Topic area very useful and very relevant to my practice.” • “Content was of interest.”

- Not-For-Profit Organizations – Transition to the New Accounting Standards

“Relevant to practice.” • “We all need financing.” • “Discussed and brought up all types of financing with some key points on each of them, so it was informative and useful.”

- Financing Strategies

“Appropriate variety of topics covered, all of which highly relevant to common tax planning issues.” • “The topics were covered in suitable depth that this wasn't a "self-study" course once the seminar was over.”

- Everyday Income Tax Issues for the General Practitioner

“Overview of ASPE changes” • “Instructor intelligently humorous and was well grounded in SM Atlantic businesses with professional approach.” • “Good review of handbook.” • “Good presentation style for a dry subject.”

- ASPE: A Survey of the Standards

Thinking of a Specialist Designation?

The CICA National Specialization Council has entered into arrangements with several organizations to assist CAs in pursuing a specialist designation in their chosen field. In some cases, Chartered Accountants can pursue fast-track options which reduce any required courses, or allow CAs to write challenge examinations.

For information on specialization and all specialty areas, please refer to the CICA website at the following locations:

Specialization

- **CA•IFA** - Investigative and Forensic Accounting
- **CA•IT** - Information Technology
- **CA•CBV** - Business Valuation
- **CA•CISA** - Information Systems Audit and Control
- **CA•CIA** - Internal Audit
- **CA•CIRP** - Insolvency & Restructuring
- **CF** - Corporate Finance

- www.cica.ca/career-development/ca-specialization
- www.cica.ca/ifa
- www.cica.ca/it
- www.cica.ca/cbv
- www.cica.ca/cisa
- www.cica.ca/cia
- www.cica.ca/cirp
- www.cpd.cica.ca/CF

Strategic Partnership

- Management Consulting
- Corporate Directors
- Family Enterprises
- Financial Planning

- www.cica.ca/cmc
- www.cica.ca/icd
- www.cafenational.org
- www.fpssc.ca



Pricing Information

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 the Institute droode@icans.ns.ca or (902) 425-3291 Ext. 31.

PASSPORTS

PD Passports were developed to offer our members and other professionals interested in taking multiple ICANS' PD valid classroom sessions throughout the year at tremendous savings. Individual Passports were designed that a member could receive potentially over a 50% savings per session if taking advantage of the full five days of sessions, mixing half-days, full-days and two-days passport valid sessions, but could also receive a saving of 23% 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 conditions on page 8). PD Passports are valid from May 1st to April 30th 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:

PASSPORT TYPE	DAYS	PD Passport Fees		Additional Per Course Fee			
		Member	Non-Member	Member		Non-Member	
				Full	Half	Full	Half
Individual	5 full/10 half	\$600	\$750	\$175	\$90	N/A	N/A
Organization Member	9 full/18 half	\$2,000		\$175	\$90	N/A	N/A
Organization Non-Member	9 full/18 half		\$2,300	\$175	\$90	N/A	N/A

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.

WATCH FOR THE FOLLOWING REFERENCES THROUGHOUT THE CATALOGUE:

- "PD1213011"* *These numbers beside the dates of each course offering represent the Course number for registration purposes.*
- "Passport Valid"* *Indicates that the course can be taken using the PD Individual or Organization Passports.*
- "Passport Discount"* *Not valid for passport registration, but passport holders can claim a discount which counts as one passport day.*
- "Passport Invalid"* *Indicates Passports cannot be used to register for these courses.*
- "# Passport Days"* *Value that counts against Passports i.e. half, one or two days.*
- "# PD Hrs"* *Hours that will be recorded for Continuous Learning Requirement in the database.*
- "Member"* *Chartered Accountant who is a member of a Provincial Institute and CA students.*
- "CAPPD"* *Chartered Accountants Pooled Professional Development.*



Registration Information and Conditions

General (All Registrations)

COURSE CANCELLATION

1. 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.
2. If a course is **cancelled due to severe weather conditions** notice will be posted on the home page of the ICANS website www.icans.ns.ca.

REFUNDS

NO REFUND will be made for cancellations received after the deadline date of **May 11th, 2012** for Passport purchases) or 2 weeks prior to any other course date. Refunds for withdrawals before those dates will be subject to a handling charge of \$25 plus HST per course.

LUNCHES

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.

NON-MEMBERS

Chartered Accountants who are members of other Provincial Institutes may register as "members" on the registration form, please provide your CICA member number (found on your fee invoice or CA Mag mailing label). Registration is also open to sufficiently qualified non-members, with the stipulation that members receive preference up to the course deadline date. After that date, all applications will be equally received. We encourage your participation.

TIMES

Please refer to course descriptions for course times. Check course outlines on ICANS' website (www.icans.ns.ca under Continuing Education) 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 do not receive a confirmation two days prior to the seminar date, please contact the Institute. 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

ICANS PD Courses will take place in the ICANS Learning Centre. Seminar locations and dates are subject to change. Please see individual course descriptions in this brochure of locations of each course and check on-line for complete addresses. Please check www.icans.ns.ca under Continuing Education for the most up-to-date information.

The Institute 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 FEES SHOULD BE MAILED TO:

The Institute of Chartered Accountants of Nova Scotia (ICANS)
1791 Barrington Street, Suite 1410
Halifax, Nova Scotia B3L 3L1
Tel: (902) 425-3291

OR FAX (credit card information only) to: Fax #: (902) 423-4505

Please direct registration enquiries to:
Danielle Roode – droode@icans.ns.ca – ext. 31
Please direct course enquiries to:
Kathie Slaunwhite – kslaunwhite@icans.ns.ca – ext. 23

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 \$25 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 the Institute office by business closing on the deadline date specified or two weeks prior to the seminar date. **ALL REGISTRATIONS MUST BE ACCOMPANIED WITH THE REGISTRATION FEE. (Registrations without fees or via phone will not be processed.)**



Registration Information and Conditions

SUBSTITUTIONS

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

Passport

REGISTRATION

Deadline for the purchase of PASSPORTS is **May 11th, 2012**.

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

ICANS reserves the right to ask for picture identification.

PASSPORT EXPIRY

Valid for PD activities from May 1st to the following April 30th. 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 the Institute 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 page 6 for pricing table) of \$175 plus HST per full-day (not available for non-members) and \$90 plus HST per half-day course (not available for non-members).

REFUNDS

NO REFUND will be made for passport cancellations received after **May 11th, 2012**. Refunds for withdrawals before that date will be subject to a handling charge of \$25 plus HST per course.

CONDITIONS

Individual PD Passport

- Fee of \$600 plus HST for members and \$750 plus HST for non-members (see page 6 for pricing table).
- Attend up to five (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. ICANS reserves the rights to the PD Passports. Inappropriate use of the PD Passport will result in the immediate cancellation of privileges with NO REFUNDS.

Organization PD Passport

- Fee of \$2,000 plus HST for members and \$2,300 plus HST to include non-members (see page 6 for pricing table).
- Organization participants may attend the equivalent of 9 full-day passport valid courses.
- Non-member Organization Passports entitle an organization to register members and non-members for up to 9 full-days, additional offerings can be added to this passport for members 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.
- An organization can register any number of members 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**.
- ICANS reserves the rights to the Organization Passports. Inappropriate use of the Organization Passport will result in the immediate cancellation of privileges with NO REFUNDS.



Smart Leaders: Thinking and Innovation Skills

(First Time in Atlantic Canada) - Oct. 16 to 18 – Halifax

8:30am to 5:30pm with the last day ending at 3pm

Course #PD12130261

We live and work in an age that demands ultra-smart leaders – those who confidently possess both the knowledge and the tools needed to deal with exponentially accelerating change and the unpredictable volatility of today's complex, often chaotic business environment. These are leaders who know how to capitalize on emergent micro-trends, reconcile seemingly intractable contradictions, discern insight from infoglut, and design a future of choice for their organizations as well as themselves. In short, these mindful leaders know where and how to focus their attention and thus how to seize immense unforeseen opportunities while others become the victims of risks misunderstood and their own myopic thinking.

Smart leaders are "plugged in" to the idea spaces of our uncertain times. They are nimble and shrewd, creative but savvy – they actually "think up" new ideas rather than hoping they fortuitously arrive. They know what their "blind spots" and cognitive biases are and this self-knowledge helps them avoid making poor decisions or otherwise doing really stupid things. They invest in nourishing their own brainpower and readily acknowledge, then let go of unproductive traits. And they tap into the incredible power of their intuition. For they have replaced the power of habit with the power of focus.

The real leaders of today are those who understand the bold contrast between the success that comes from learning how to think without constraints and the failure that invariably follows an over-reliance on logic and analytical tools. Smart leaders can take their thinking to a different level by reconciling (vs. rationalizing) seeming opposites, such as the paradox of combining supreme confidence and profound humility. They fundamentally believe in their ability to solve problems – they know who they are, where they are going and how to get there. Yet they are also mindful of their mental traps and limitations. Their authenticity, self-assurance and knowhow inspire others to tackle seemingly insurmountable obstacles.

Leaders of the past relied on the lens of rational analysis to peer into the future only to discover, too late, that the urgent and vital task of understanding how their world – their business and personal lives – would unfold requires a different kind of thinking skills. Situations in which accepted rules and norms supply all the answers are now an endangered species. Imagination, the ability to connect conscious with unconscious thought and free oneself from the grip of self-imposed barriers, is the mind's faculty for grasping critical issues before they become daunting, recognizing patterns neither spatially contiguous nor logically related, and looking around corners to anticipate high-risk, high-impact events.

This is your opportunity to evaluate how you presently think and whether it serves the pursuit of your personal and professional goals. Discover better ways to find answers to vexing challenges, increase your productivity and understand your unique barriers and blind spots. Acquire a competitive advantage in dealing with perplexing issues that confront your business through robust dialogue and build a new network of seasoned, upwardly mobile professional contacts. *You will not only learn to think differently, you will begin thinking differently about yourself.*

For a detailed outline of program topics visit: <http://www.icans.ns.ca/media/documents/SmartLeadersOutline.pdf>

Who should attend

The question every competent executive today must ask is whether his or her current thinking style is up to the dictates of an era in which ideas are the raw materials of prosperity. Whether you seek to run your business better, grow it through revenue-focused invention or transform it entirely, innovation is really about everything you do and how you strategically choose to do it. Even if you decide not to change, the world around you most certainly is and will continue doing so at an ever more breathtaking pace.

If you want to learn how to synthesize pertinent information, challenge conventional wisdom, reconcile paradoxes, focus on what really matters and create intelligent yet feasible solutions, this program was designed with YOU in mind. What you will discover will likely contradict everything you've probably ever been taught about how to solve problems and make the right decisions.

The ability to think better and differently from others is the most significant competitive advantage you will ever possess. Your ultimate success lies not in what you know but rather in how you think, and therefore in what you DO with what you know. Only when you can truly think for yourself can you discover your inner genius and ascend to places and realities you never thought possible

Faculty

This timely, provocative, potentially life-altering learning experience is the creation of Dr. Jim Murray who has been researching and teaching creative problem-solving skills and innovation principles for over 40 years (and instructing senior accounting professionals since 1982). His life's quest is to liberate personal and organizational genius and to change lives. (For a full description of his credentials and accomplishments, check out his bio on www.SmartLeaders.ca.)

Program Fees

The Program Fee is \$2,000 plus 15% HST (Non-members \$2,500 plus 15% HST). Lunches included. **PD12130261**

Registration:

Complete a registration form and return to ICANS on or before **September 14, 2012**. Maximum registration is **20 participants**.



(902) 425-3291



pdreg@icans.ns.ca

9



1791 Barrington St., Ste. 1410
Halifax NS B3J 3L1



(902) 423-4505

Accounting

RE-OFFERING

Accounting, Auditing & Professional Practice Update

Level: Intermediate

This course provides an overview of the current developments in accounting and assurance standards. It is suited to members who practice public accounting, serving small and medium-sized businesses.

Objectives:

- To review the direction of accounting standards in Canada
- To review the recent revisions to the CICA Handbook, specifically Accounting - Part II (ASPE), Accounting Standards for Not-for-Profits (Part III), and Assurance - Part I, and other sources
- To provide specific examples of the implementation of the new recommendations
- To provide practice guidance on other matters that are current and relevant to the participants

Learning outcomes:

- Awareness of recent CICA pronouncements in accounting and assurance
- Ability to identify the potential impact on clients by the recent CICA pronouncements
- Ability to apply recent CICA pronouncements in some situations

Topics include:

- Introduction and overview of new standards
- Review of various components of CICA Handbook - Part I, IFRS for publicly accountable enterprises, Part II, Accounting Standards for private enterprises, and Part III, Accounting standards for not-for-profit organizations
- Review of matters discussed by the Private Enterprise Advisory Committee
- Review of transition guidance for ASPE
- Lessons learned from application of CASs - e.g., subsequent events review
- Other assurance matters in progress, including review engagements and notice to readers
- Other practice matters including review of practice inspection findings
- Exposure drafts and other projects in process.

Seminar Leaders: (Instructor Bios Pages 24 & 25)

Susan McIsaac, FCA

Jul 5	PD12130011	ICANS
Member: \$280	Passport Valid	9am–5pm
Non-Member: \$330	1 Passport Day	7 PD Hrs

RE-OFFERING

ASPE: A Survey of the Standards

Level: Intermediate

Objectives:

Effective January 1, 2011, the accounting by Canadian private enterprises changed; these enterprises are required to use either International Financial Reporting Standards (IFRS) or Accounting Standards for Private Enterprises (ASPE). This two day seminar is designed for individuals seeking an in-depth, detailed review of ASPE. All ASPE Handbook sections will be reviewed and discussed in the material together with an introductory module discussing the changeover from GAAP to ASPE.

Within the Modules, examples and exercises will also cover the “newer” topics of accounting, for example, the inventory standards in ASPE are the same as those in GAAP but these standards were only introduced in 2008. In addition, the seminar material is supplemented by appendices including sample financial statements, example notes and a comparison of the ASPE Section with those of the previous CICA Handbook – Accounting and CICA Handbook – Accounting XFI.

Seminar outline:

- Accounting Standards Framework & General Standards
- Financial Instruments
- Tangible Assets
- Long-term Assets
- Non-Financial Liabilities
- Shareholder Equity
- Revenue & Other Expenses
- Other Disclosures and Other Matters

Benefits of attending:

Participants will gain a reasonable understanding of the ASPE requirements to improve their technical knowledge of Canadian standards for private enterprises. A good understanding of ASPE, especially by those who may have been removed from the Handbook in recent years, will allow those individuals to appreciate the changes that have occurred in Canadian accounting standards.

Who will benefit:

This seminar will benefit those who are seeking a detailed review of ASPE including CAs in public practice, private companies as well as other non-corporate entities e.g. Partnerships. Canadian standards have seen significant change in recent years and many of these changes are within ASPE; accordingly, individuals who have been detached from Canadian standards in recent years may find this course beneficial to regain a strong technical accounting base.

(E-Learning version page 26)

Seminar Leader: (Instructor Bios Pages 24 & 25)

Debi Peverill, CA

Jun13 & 14	PD12130021	ICANS
Member: \$510	Passport Valid	9am–5pm
Non-Member: \$660	2 Passport Days	14 PD Hrs



Accounting

RE-OFFERING

ASPE: The Transition

Level: Intermediate

Accounting Standards for Private Enterprises (ASPE) requires transitional adjustments when this new platform is adopted by private enterprises for fiscal years commencing on or after January 1, 2011. Much has been said about the transition but what is the reality of adopting a new accounting framework? This course will review the retrospective impacts of adopting ASPE. The measurement and recognition changes required or considered upon adoption will be explored in this course. The course will also look at each transitional “option” available at transition that may lessen the impact of retrospective application of the ASPE standards. The focus will be on the transition date. The course will not review the future measurement and recognition requirements of ASPE though future accounting will be a consideration of the transitional accounting options. The course will be primarily discussion and examples with a few discussion questions and exercises. In addition, a complete transitional financial statement will be included.

The objective of the material is to provide participants with deeper knowledge and understanding of the financial statement transitional requirements of ASPE. The material can also be used as a future resource to seek out examples to be used for financial statement presentation and disclosure of the transition. This half day course is all about the transition, not a comparison to past practices or an in-depth review of ASPE.

Participants will be able to:

- Understand the transition to be disclosed in financial statements of private enterprises
- To be able to assess and apply the impacts of the transitional exemptions in financial statements.
- Understand financial statement presentation and disclosure of the transition.
- To understand the requirements of Section 1500 of Part II of the CICA Handbook – Accounting.

Seminar outline:

- The compilation of transitional financial statements provided in Section 1500 of Part II of the CICA Handbook – Accounting.
- All presentation and disclosure requirements in Section 1500 of Part II of the CICA Handbook – Accounting.
- The adjustments that may need to be applied at the transition date.
- Sample presentation of the transition.

Who will benefit:

Business/ Industry sector limited to private enterprise reporters. Public practitioners who serve the private enterprise market.

Seminar Leader: (Instructor Bios Pages 24 & 25)

Susan McIsaac, FCA

Jul 6 PD12130031 ICANS
 Member: \$155 Passport Valid 9am–12pm
 Non-Member: \$190 ½ Passport Day 3 PD Hrs

RE-OFFERING

IFRS – Update

Level: Intermediate

IFRS standards are changing and it is important to keep abreast of recent developments.

The course will provide participants with a review of new and revised IFRSs and an up-to-date snapshot of other projects being considered by IFRS standard setters. The content covers new and revised standards approved from July 2010 to June 2011.

Topics include:

- Overview of IFRS standards – issued, revised and in progress
- Review of new and revised standards
 - Consolidation
 - Joint ventures
 - Fair value measurement
 - Financial instruments
 - Employee benefits
 - Other
- Review of Exposure Drafts and Other Projects in Progress – IASB’s work plan

Who will benefit:

All professionals who work in financial reporting and related areas of publicly accountable enterprises including the following: CFO and VP, director and/or senior manager, controller and other financial reporting staff. Auditors and audit committee members will also find this to be a useful course.

Prerequisite:

Participants should have knowledge of IFRS as only the recent changes will be presented.

Note: This is an “Update” course and will update the understanding of the existing body of IFRS knowledge. It is not an Introductory or Comparison course.

Seminar Leaders: (Instructor Bios Pages 24 & 25)

Kate Horne, CA

Jul 6 PD12130041 ICANS
 Member: \$155 Passport Valid 1pm–4pm
 Non-Member: \$190 ½ Passport Day 3 PD Hrs



Accounting

RE-OFFERING

Not-for-Profit Organizations – Transition to the NEW Accounting Standards (Part III)

Level: Intermediate

This course provides an overview of the transition issues related to application of the new accounting standards for not-for-profit organizations (NFPOs) under Part III of the CICA Handbook.

The Accounting Standards Board (AcSB) finalized the new accounting standards for private not-for-profit organizations in December 2010. The standards clarify the AcSB's position that there should be no differences in accounting between profit-oriented enterprises and not-for-profit organizations when the circumstances and transactions are the same, other than for matters included in the 4400 series of Handbook Sections. Part III for NFPOs is referenced to Part II, Accounting Standards for Private Enterprises, as its base. It should be noted that a NFPO can also elect to apply Part I, IFRS.

These standards are effective January 1, 2012. The existing accounting standards in Part V of the Handbook will be retained for use by not-for-profit until they have all adopted either the new Part III or IFRSs. First-time adoption of this Part of the organizations Handbook is mandatory for annual financial statements relating to fiscal years beginning on or after January 1, 2012.

The general rule is that the changes must be applied retrospectively, with restatement. This course will review the transition guidance.

Learning outcomes:

- Identification of choices to be made upon transition.
- Identification of significant changes from current GAAP, including financial instruments.
- Comprehensive understanding of CICA 1501, First-time adoption by not-for-profit organizations, in Part III.
- Ability to prepare the required disclosure upon transition.

Topics include:

- Introduction and effective dates
- Overview of Part III of CICA Handbook
- Review of Part II of CICA Handbook as it would relate to NFPOs
- Accounting for transition

Who will benefit:

Those who are responsible for preparing, analyzing or auditing financial statements for smaller NFPOs.

Prerequisite:

Familiarity with the current NFPO standards in Part V, and Accounting Standards for private Enterprises, in Part II of the CICA Handbook.

Seminar Leader: (Instructor Bios Pages 24 & 25)

Tammy Crowell, CA, MBA

Jun 4	PD12130051	ICANS
Member: \$155	Passport Valid	1pm–4pm
Non-Member: \$190	½ Passport Day	3 PD Hrs

NEW

PSAB 101

Level: Intermediate

This course is developed for finance professionals who prepare, audit or need to understand the Public Sector Accounting Board (PSAB) accounting recommendations as they apply to financial reporting by entities in the government sector. Key recommendations of the *PSAB Handbook* and their application are reviewed, and a variety of examples are used to assist in understanding the application of the recommendations.

Objectives:

- Understand PSAB accounting recommendations
- Apply PSAB recommendations in the preparation of government financial statements
- Develop financial reporting in accordance with PSAB

Topics include:

- Financial statement concepts & objectives
- Reporting entities
- Financial reporting
- Investments
- Government partnerships
- Investments in government business enterprises
- Restricted assets and revenue
- Tangible capital assets
- Liabilities, contingent liabilities and contractual obligations
- Long-term debt and leased tangible capital assets
- Changes in PSAB – exposure drafts, discussion papers, transitional provisions

Emphasis Placed on:

- Defining the Government Reporting Entity
- Employment benefits
- Government transfers
- Leased Tangible Capital Assets
- Solid waste landfill closure and post-closure liability
- Tax revenue

Who will benefit:

This course is particularly valuable to those who have a familiarity with the *PSAB Handbook* and prepare, audit, use or provide advice on public sector financial reports and would like to develop a stronger understanding of the *PSAB Handbook*.

Seminar Leader: (Instructor Bios Pages 24 & 25)

Jill Devanney, CA

Jun 18	PD12130061	ICANS
Member: \$280	Passport Valid	9am–5pm
Non-Member: \$330	1 Passport Day	7 PD Hrs



RE-OFFERING

Auditing in the New CAS Environment

Level: Introductory

The Canadian Auditing Standards (CAS) 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 CAS in the new auditing environment.

Through a case study approach, participants are given an opportunity to build on their understanding of the standards, and to practise applying the standards to a set of client-specific facts. The case study will be based on the audit of a moderately complex "for-profit" private company. Key elements of an engagement working paper file will be developed as a deliverable to this course.

Topics include:

- Why comply - commitment to quality
- The new audit environment
- Pre-engagement procedures
- Communication with others
- A top-down approach to internal control
- Risk assessments
- Further audit procedures
- Engagement execution
- Audit documentation
- Evaluating evidence
- Engagement reporting

You will learn:

- An overview of the CASs
- How to perform an audit in the new CAS environment
- The key elements of an engagement working paper file

Who will benefit:

This course is recommended for audit practitioners at all levels of experience to obtain a practical understanding of auditing in the CAS environment. It will also be beneficial to any individuals who want to learn the CASs for other purposes.

(E-Learning version page 26)

Seminar Leader: *(Instructor Bios Pages 24 & 25)*

Susan McIsaac, FCA

Jul 9 & 10	PD12130071	ICANS
Member: \$510	Passport Valid	9am–5pm
Non-Member: \$660	2 Passport Days	14 PD Hrs

RE-OFFERING

Financing Strategies

Level: Intermediate

Objectives:

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 and existing capital structure. It will review the various forms of financing including operating lines, term debt, subordinated debt, and private and public equity. The course 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.

The seminar 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:

Goal of the course 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.

Benefit 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
- Operating Lines and Term Debt
- Mezzanine and Subordinated Debt
- Private Equity
- Public Equity and Convertible Debentures
- Understanding Cost of Capital
- Cost of Capital and Investment Decisions
- Financing Process

Seminar Leader: *(Instructor Bios Pages 24 & 25)*

Blair Cook, CA, CPA, MBA

Jun 25	PD12130081	ICANS
Member: \$280	Passport Valid	9am–5pm
Non-Member: \$330	1 Passport Day	7 PD Hrs



Professional and Personal Skills

NEW

Communication Skills Using the Myers-Briggs Type Indicator

In today’s world of fast change and intense economic pressure, working hard and being well informed is not enough. You must be able to communicate effectively with others to make real progress in this information age. People who have taken this workshop find that they have sharpened their communication strategies and broadened their repertoire of communication skills.

This workshop is taught through the use of enjoyable, revealing exercises, self-testing, and lecture.

After this workshop you will be able to:

- Understand the strengths and weaknesses of your communication style
- Recognize and use the preferred methods of communication of your listener
- Recognize and appreciate body language
- Improve your ability to understand and reduce conflict
- Learn how to reduce communication blocks
- Give instructions and share information effectively
- Understand feedback – how to get it, give it, and what to do with it
- Recognize that what you “do” communicates more than what you “say”
- Distinguish between perception, emotions, and facts
- Understand how you contribute to and are perceived by your team
- Work to incorporate new knowledge into the functioning of your team
- Identify the jobs and tasks that give you greater satisfaction

A manual, as well as the MBTI Inventory will be provided to participants to help them increase their knowledge of their personal and work style, its strengths and potential development areas.

Of Interest to:

This workshop will provide excellent tips and techniques for everybody, particularly those working in teams.

Seminar Leader: *(Instructor Bios Pages 24 & 25)*
Eileen Pease, M.Ed., CHRP

May 29	PD12130271	ICANS
Member: \$280	Passport Valid	9am–5pm
Non-Member: \$330	1 Passport Day	7 PD Hrs

RE-OFFERING

Defining and Managing Projects

Level: Introduction

Whether you’re conducting an audit, building a house or planning a vacation, temporary endeavours with specific objectives to be accomplished within a defined budget and schedule are all projects. So, what characteristics of an activity make it a project and not something else? Who is a project manager? What does it mean to manage a project? Is there a professional project management body of knowledge and related certification?

This course covers the five process groups of project management: Initiation, Planning, Executing, Monitoring and Closing. Throughout the course, the nine knowledge areas of project management are examined in a practical way that allows students to understand the depth to which these areas should be applied based upon the project at hand.

This course uses a combination of presentations, workshops and templates to help drive home the value of a more formal approach to project management. Students will learn project management process groups and knowledge areas, and how to apply them in practical ways.

After this workshop you will:

- Understand the five project management phases and nine knowledge areas
- Know how to define project objectives, stakeholders and business objectives
- Understand how to plan project activities to produce deliverables and how to report on project progress
- Understand how to manage change as a project progresses
- Know how to plan for the management of a project in consideration of the nine knowledge areas

Note: This is not a hands-on seminar
Maximum 12 participants

Seminar Leader: *(Instructor Bios Pages 24 & 25)*
Michael Frenette, PMP, I.S.P., CMC, MCITP

May 28	PD12120091	ICANS
Member: \$280	Passport Valid	9am–5pm
Non-Member: \$330	1 Passport Day	7 PD Hrs

Professional and Personal Skills

NEW

Developing Resilience in a Healthy, Productive Workplace

What do Clara Hughes, Angelina Jolie, and Winston Churchill have in common? They have all struggled with depression at some point in their lives, but they have also been very, very successful. Depression is an illness which is amazingly easy to hide and ignore in the workplace, but it drains your bottom line and causes untold pain and misunderstanding.

Executives, managers, and professionals can do plenty to help their people and help their bottom line. Learn how depression shows up in the workplace and what you can do to support the depressed person while reducing their impact on productivity.

Understand the conditions that may influence depression and the many different things you can do to adjust your own management style and your workplace environment to encourage more joy, safety, and productivity in the workplace. Global Business and Economic Roundtable reckons depression costs us about 4% of our GDP which is roughly equal to the combined output of Canada's mining and oil-and-gas industries. Learn how to reduce that staggering cost and create healthier workplaces.

Program Content:

- Understand how depression may show up in the workplace
- Know the appropriate way to approach someone who may be depressed
- How to support a person during and after a period of depression
- How to recognize and handle workplace bullying
- How to promote and protect the mental health of your employees
- Ten ways to encourage a healthy, productive workplace

Program Benefits:

In this course you will learn to...

- Enhance your understanding of a condition which affects one in five Canadians in their lifetime
- Make it easier for employees to handle their anxiety, worry, and sleeplessness
- Understand the rights and responsibilities of employer and employee on this issue
- Have an opportunity to discuss what works with your colleagues
- Understand the role of perception and reality when coping with mental illness
- Listen well, be accommodating and agree on clear performance measures
- Set up ways to assess the current costs of depression in your workplace

Seminar Leader: *(Instructor Bios Pages 24 & 25)*
Eileen Pease, M.Ed., CHRP

Jun 26	PD12130101	ICANS
Member: \$280	Passport Valid	9am-5pm
Non-Member: \$330	1 Passport Day	7 PD Hrs

RE-OFFERING

Effective Communication Skills for Outstanding Performance

One study of 500 successful organizations revealed that outstanding performance had more to do with issue resolution communication skills than with forms and policies that drive performance management. Effectiveness in this area of communication relates directly to higher productivity, quality, safety and retention. We can all take more ownership for handling issues as they arise to support the creation of more feedback friendly cultures in the workplace and outstanding performance.

You don't have to like everyone you work with but you do need to respect the workplace relationship. With every interaction you are influencing that relationship. A healthy relationship is one whereby individuals are able to deal with differences effectively. Some of the prices we pay for avoiding these conversations include: low morale, low productivity, higher costs and turnover.

We all can be more pro-active and more effective at handling issues as they arise with a step by step approach and practical guidelines for engagement.

Join us in this stimulating, hands-on workshop and learn practical tools for communication effectiveness:

- Understand how your paradigm creates your outcomes
- Learn the steps of an effective 4 step communication tool for conflict prevention and checking out assumptions
- Learn step by step guidelines for how to engage in effective conflict resolution in a manner that lowers defensiveness, creates safety and gets results
- Learn how to stay present when emotions run strong and remain in your logical brain in the process
- Learn tips for managing anger: yours and others

I invite you to join us for this practical workshop designed to enhance your skill in participating in constructive conversations for great results. With no-nonsense guidelines for these conversations you will find your confidence and competence in this area will be greatly improved.

Who should attend:

Managers, supervisors, and anyone interested in improving communication effectiveness for conflict prevention and resolving issues for better results and stronger working relationships.

Seminar Leader: *(Instructor Bios Pages 24 & 25)*
Mara Vizzutti, B.Ed., ACC

Jun 21	PD12130111	ICANS
Member: \$280	Passport Valid	9am-5pm
Non-Member: \$330	1 Passport Day	7 PD Hrs

Professional and Personal Skills

NEW

Maximizing Your Leadership Potential

A recent national health report has assessed that Canada is losing 56 billion a year in economic loss due to the effect of mental health issues, such as depression in the workplace. These issues also contribute to poor performance, low morale, absenteeism and lack of job engagement. It is a proven fact that job stress is a major factor in the problem. How much do you think your organization or your clients may be losing due to this issue? The fact is, this economic loss affects us all.

In part, our economic gains or losses are determined by the quality of the people we employ. If we are going to turn this around, then we need to discover the issues as they relate to our own individual workplace.

In this training we will address:

- What is the primary role of the leader.
- What is the primary role of those who are employed.
- How do we begin to change the culture in our organization.
- How do we begin to bring out the best in our people.

If you take this training you will:

- Never look at leadership in the same light again.
- Begin to be a change agent in your workplace.
- Walk away with a beginning strategy to make your workplace a better place.

Who is this for:

- Anyone currently in any leadership role.
- Anyone who has influence in the lives of leaders.
- Anyone who desires to move forward in a greater self-awareness.

Seminar Leader: (Instructor Bios Pages 24 & 25)

Randy Linzel

Dr. Steve McEvoy

Jun 11	PD12130121	ICANS
Member: \$155	Passport Valid	1pm-4pm
Non-Member: \$190	½ Passport Day	3.5 PD Hrs

RE-OFFERING

Working Effectively with Multiple Generations

You work with people who have different skills, abilities, interests, life experiences and expectations. Some are younger, some older, some with a lot of different work experiences, some new to the work world, some with a lot of education, some without. You have good days, and days you'd rather forget, but you're still expected to function as a team, coping with an ever-increasing workload and "getting along" with your team. Stress levels are high, and communication is often lacking, misinterpreted or misunderstood. *Sound familiar?*

In this interactive session, we will uncover some of these differences with the goal of understanding how diversity helps us to be more effective in our roles. You'll gain a greater understanding of:

- The multiple generations in the workplace and how their expectations vary
- The impact of a global economy, technology, human motivators and values
- How Management styles have changed and what is expected of managers and leaders in the workplace today
- Tips for Working with multiple generations

There will be individual and group activities with opportunity for discussion and input. A variety of materials will also be used, including group brainstorming, self-discovery and presentations. You will leave this session with a better understanding of diversity, especially generational diversity, the differences and similarities in expectations and needs, and an action plan for how you may be able to manage diversity more effectively.

Who should attend:

Managers, supervisors, human resource professionals and anyone interested in working more effectively with diversity in the workplace.

Seminar Leader: (Instructor Bios Pages 24 & 25)

Mara Vizzutti, B.Ed., ACC

Jun 11	PD12130131	ICANS
Member: \$155	Passport Valid	8:30am-12pm
Non-Member: \$190	½ Passport Day	3.5 PD Hrs

Taxation

RE-OFFERING

Catching Up: 5 Years of Income Tax Developments

Level: Intermediate

Objectives:

Income tax changes and evolves over time. "Keeping up" is necessarily an ongoing and 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 income tax developments and find out what they may have missed.

Who should attend:

This seminar would be extremely useful for anyone, whether in public practice, industry or the public sector; who feels that they haven't paid enough attention to recent income tax developments.

Benefits of attending:

In the absence of this seminar, one must take many tax seminars to "catch up" if the "catch up" period extends beyond one year. This seminar provides an opportunity to learn about the more significant income tax developments that have occurred during the past five years. At the end of this seminar, the participant 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 capital gains
- retirement saving
- income splitting
- tax credits, carry-forwards and other deductions
- 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 new 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?

Seminar Leader: (Instructor Bios Pages 24 & 25)

David Cameron, CA

Jun 12	PD12130141	ICANS
Member: \$280	Passport Valid	9am-5pm
Non-Member: \$330	1 Passport Day	7 PD Hrs

RE-OFFERING

Eligible Dividend Regime

Level: Intermediate

Objectives:

The objective of this seminar is to acquaint advisors and members of industry with planning for eligible dividends. They should be aware of the rules even if they do not end up using the rules.

Who should attend:

Income tax advisors and members of industry who are in controllership or income tax positions.

Benefits of attending:

At the end of this seminar, the participants should have an understanding of the rules, where they can be applied, the CRA schedules and issues in applying the legislation.

Content:

- Reasons behind the rules
- Calculation of the GRIP
- What is the LRIP
- Calculation of LRIP on ceasing to be CCPC
- Provincial rates
- Public companies / CCPC's / holding companies
- Review of CRA schedules
- Bonuses vs. dividends
- Alternative minimum tax
- Designations and penalties
- Planning points
- Anti-avoidance provisions
- Issues in applying the rules
- Examples on losses, timing on amalgamations and winding-ups
- Application in purchase and sale of business
- Frequently asked questions
- Holding company issues

Seminar Leader: (Instructor Bios Pages 24 & 25)

Rob Jeffery, CA, CPA

Jun 4	PD112130151	ICANS
Member: \$155	Passport Valid	9am-12pm
Non-Member: \$190	½ Passport Day	3 PD Hrs



Taxation

RE-OFFERING

Everyday Income Tax Issues For The General Practitioner

Level: Intermediate

Objectives:

This full-day seminar deals with income tax issues that general practitioners encounter everyday. Topics will be approached as practical issues rather than technical details. General background information will be provided to promote an understanding of each issue. Practical concerns, problems, suggestions and planning will be emphasized.

Who should attend:

The ideal seminar participant is a practitioner who has general income tax knowledge and deals with small and medium-sized owner-managed businesses.

Benefits of attending:

Many participants take this seminar again and again because they find the content so very relevant to the client situations they deal with and because each year there is always something new and interesting.

Topics covered:

- Incorporation and integration issues including recent developments and eligible dividend issues.
- Remuneration issues - including salary reasonableness, income splitting with family members, bonuses payable, employees vs contractors.
- Expenses/assets with both a personal and business element - including meals and entertainment, automobiles, taxable benefits.
- Shareholder benefit and loan issues - including debit balances, housing loans, benefits.
- Select timely and topical practical matters of interest to Practitioners.
- Practitioners' library of facts, figures, deadlines, income tax resources, ideas.
- The small business deduction including criteria, management fees and personal service businesses.
- Common traps and pitfalls illustrated through practical, realistic examples and situations (bonus material – covered in class when time permits).

Prerequisite courses/knowledge:

General corporate and personal income tax knowledge.

Seminar Leader: (Instructor Bios Pages 24 & 25)

Rob Jeffery, CA, CPA

Jun 20	PD12130161	ICANS
Member: \$280	Passport Valid	9am–5pm
Non-Member: \$330	1 Passport Day	7 PD Hrs

RE-OFFERING

Income Splitting

Level: Introductory to Intermediate

Objectives:

This half-day seminar will discuss the tax benefits of income splitting, including a detailed review of the Attribution and Split Income rules, which commonly impede access to these benefits. Methods of splitting income without offending these rules will be discussed in detail.

Who should attend:

This seminar is designed for advisors with a basic knowledge of personal tax planning who would like to learn more about the benefits of income splitting. It is for tax practitioners who advise high net worth individuals, professionals and business owners.

Benefits of attending:

Participants will understand the benefits of splitting income, the legislative impediments to such strategies and techniques for achieving tax benefits within the present legislative regime. At the end of this seminar the participant should be able to

- identify the benefits of income splitting
- understand the related legislative sections of the Income Tax Act
- identify planning techniques to achieve income splitting
- identify the pitfalls to avoid

Content:

- benefits of income splitting
- impact of eligible dividend rules on income splitting
- attribution rules
- common strategies for splitting income with
 - spouses
 - minor children
 - adult children
- inter-provincial income splitting opportunities

Seminar Leader: (Instructor Bios Pages 24 & 25)

Greg Leslie, CA

Jun 5	PD12130171	ICANS
Member: \$155	Passport Valid	1pm–4pm
Non-Member: \$190	½ Passport Day	3 PD Hrs



Taxation

NEW

Income Tax Refresher for Corporate Tax Planning

Level: Introductory

This is a refresher course for those participants who desire to update their knowledge in corporate tax and also an introductory course for those of you that want to learn more in the corporate tax area. At the end of the two days participants should have a good understanding of the taxes that impact corporations.

Seminar outline

- An introduction to tax
- Determination of residency
- Common definitions under the Income Tax Act that impact a corporate taxpayer including, related parties, affiliated parties, and associated corporations
- Calculation of corporate taxes
- Various sources of income, including active business income, investment income, specified investment business and personal service businesses will be discussed
- Commonly used corporate reorganization provisions including 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
- Loss utilization
- Issues for Buy sell agreements and purchase and sale of business
- Owner manager remuneration and estate planning
- Acquisition of control and debt forgiveness

Prerequisite

Participants may consider registering in "Tax Returns Corporate" prior to taking this seminar or have equivalent experience in preparing corporate tax returns.

Who will benefit

Anyone who is involved in corporate tax matters that desire to expand or update their knowledge in the area of corporate tax.

(E-Learning version page 26)

Seminar Leader: *(Instructor Bios Pages 24 & 25)*
David Cameron, CA

May 24 & 25	PD12130181	ICANS
Member: \$510	Passport Valid	9am–5pm
Non-Member: \$660	2 Passport Days	14 PD Hrs

RE-OFFERING

Practicing Safe Tax

Level: Intermediate

Objectives:

This half-day seminar is designed to help professional advisors reduce their exposure to liability in their tax practices. The seminar focuses on the procedures and processes of practicing in the tax area, highlighting areas where a better job could be done to protect practitioners from liability. The seminar also includes a discussion of technical issues associated with the areas where AICA claims experience show the greatest number and dollar value of claims.

Who should attend:

Practitioners and members in industry who are involved in tax compliance and want to obtain a better understanding of some of the risk areas and new practitioners in the process of developing their tax practices would benefit from this seminar.

Benefits of attending:

By the end of this seminar, participants will better understand some of the areas of risk and be able to determine whether their firm is adequately protected. Participants will also obtain information to use in developing a safe foundation for their tax services.

Content:

- Management and administration
- Tax services responsibility
- Dealing with the CRA
- Researching tax law
- Taxpayer relief provisions, collections and Third Party Liability
- Tax compliance
- Tips and traps
- GAAR
- Worst Case Scenario – malpractice lawsuit
- Top 10 liability insurance problems

Seminar Leader: *(Instructor Bios Pages 24 & 25)*
Duncan Ferguson,-CA

Jun 5	PD12130191	ICANS
Member: \$155	Passport Valid	9am-12pm
Non-Member: \$190	½ Passport Day	3 PD Hrs

Taxation

RE-OFFERING

Tax Issues for Private Corporate Groups

Level: Intermediate

Objectives:

This seminar covers the unique taxation issues that apply to groups of privately held companies and their shareholders. The seminar includes a detailed review of the association rules, a series of mini cases reviewing the issues that arise during the growth of a corporate group, the use of trusts and partnerships, and issues in respect to transactions between group members.

Who should attend:

This seminar will be of interest to practitioners and managers involved with groups of privately held companies.

Benefits of attending:

At the end of this session, participants will understand the unique taxations issues that apply to groups of privately held companies and their shareholders.

Content:

- Basic related, associated, and affiliated rules
- The rules that modify the associate rules
- The results of associating corporations
- Approaches to avoid association
- Timing issues
- Domestic transfer pricing
- Use of trusts and partnerships in the group
- GST issues
- Loss utilization and the stop-loss rules

Seminar Leader: (Instructor Bios Pages 24 & 25)
Henry Visser CA, LLB TEP

Jun 19	PD12130201	ICANS
Member: \$155	Passport Valid	9am–12pm
Non-Member: \$190	½ Passport Day	3PD Hrs

RE-OFFERING

Taxation of Employee Benefits

Level: Intermediate

This half day seminar provides a review of the income tax implications of benefits conferred on employees by their employers, including both owner-managers and employees who are unrelated to the employer. Participants will gain an understanding of the income tax issues which arise from various types of benefit, assisting them in assessing the tax-effectiveness of various benefit plans and choices of employment benefits, enhancing 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 Leaders: (Instructor Bios Pages 24 & 25)
Greg Leslie, CA

Jun 19	PD12130211	ICANS
Member: \$155	Passport Valid	1pm–4pm
Non-Member: \$190	½ Passport Day	3 PD Hrs



Information Technology

NEW

**Charting with Microsoft Office
Communicate More Effectively!**

Level: Intermediate

Everyone knows that you can create charts in Excel and PowerPoint. But do you know that you can also create charts in Word? Or that you can create charts which allow users to self-filter the data displayed? Or how to create "mixed" charts, such as one that combines a line chart and a column chart? Or how to create a PivotChart? In this three and a half hour course, you will learn how to move past the basics of charting in Microsoft Office and how to create compelling and captivating charts to help communicate your message more effectively.

Learning Objectives:

- Recognize which type of chart is appropriate for specific circumstances
- Generate standard charts in Excel, Word, and PowerPoint
- Modify formatting on individual chart elements, including chart axes, gridlines, and titles
- Describe the process for creating custom charts such as thermometer charts, bullet graphs, tachometer charts and saving these as chart templates for future use
- Utilize macros as a means for creating drill-down charts

Prerequisites: Basic understanding of computer operations and Microsoft Office applications

Who should attend: Microsoft Office users seeking to use charts as effective communication tools

Note: NOT a hands-on course

Seminar Leader: (Instructor Bios Pages 24 & 25)
Ward Blatch, CA, MCSA

Jun 7	PD12130221	ICANS
Member: \$155	Passport Valid	1pm–4:30pm
Non-Member: \$190	½ Passport Day	3.5 PD Hrs

NEW

**Excel Reporting – Best Practices,
Tools and Techniques**

Level: Advanced

This seminar is about how to create accurate, easy-to-prepare reports in Excel when the source data resides in an accounting or other database. In this seminar, learn how to use tools such as ODBC and OLAP to connect Excel to external data sources for reporting and analysis. You will also learn best practices for spreadsheet design and for report formatting and presentation.

Learning Objectives

- Link and import data from external databases – including multi-table databases – into Excel
- Use Tables and PivotTables to create accurate financial reports and analyses
- Describe Excel shortcuts for formatting financial reports
- Implement Excel templates to improve reporting productivity
- Identify opportunities to work with third-party tools to streamline reporting in Excel

Prerequisites: Strong working knowledge of Excel 2007 or Excel 2010

Who should attend: Accountants and other business professionals who want to use Excel to reduce the risk of errors, simplify reporting processes, and improve the quality of reports.

Note: NOT a hands-on seminar

Seminar Leader: (Instructor Bios Pages 24 & 25)
Ward Blatch, CA, MCSA

Jun 6	PD12130231	ICANS
Member: \$155	Passport Valid	8:30am–12pm
Non-Member: \$190	½ Passport Day	3.5 PD Hrs

Information Technology

NEW

Excel Tables - Revolutionize How You Work with Excel!

Level: Intermediate

Added to Excel with the 2007 release, Tables are one of Excel's best features about which most users know very little and, therefore, fail to experience the benefits of working with this great feature. Much more than just a formatting tool, Tables will revolutionize how you work with data in Excel. Tables can serve as data sources that automatically and dynamically re-size to match the volume of data under analysis; Tables provide a simplified means of writing formulas known as Structured Referencing; Tables contain advanced filtering and sorting capabilities; and Tables streamline the process of working with large volumes of data.

If you are using Excel 2007 or Excel 2010 and are not working with Tables, then you need this three and a half hour course to increase your efficiency and proficiency with Excel.

Learning Objectives

- Describe Excel's Table feature including how to create Tables in Excel 2007 and 2010
- List five key advantages of working with Tables
- Create formulas in Tables using Structured References, including formulas that refer to Tables in other worksheets and workbooks
- Use Tables as automatic re-sizing data sources for other objects, including PivotTables and PivotCharts
- Describe how to sort and filter data in Tables, including using external criteria to filter data inside a Table

Note: NOT a hands-on course

Prerequisites: Fundamental knowledge of Excel 2007 or Excel 2010.

Who should attend: Accounting, financial, and business professionals seeking to become more efficient and proficient with Excel.

Seminar Leader: *(Instructor Bios Pages 24 & 25)*
Ward Blatch, CA, MCSA

Jun 6	PD12130241	ICANS
Member: \$155	Passport Valid	1pm-4:30pm
Non-Member: \$190	½ Passport Day	3.5 PD Hrs

NEW

Office 365

Level: Basic

As cloud services become normal practice in business, the move from on-premise to hosted services for email, document sharing, collaboration, and communication tools is a logical first step. While there are a number of solutions available for this first step, this seminar demonstrates how Microsoft's Office 365 can work for your business. This seminar will cover configuring and using Office 365 services such as email & calendar, Office Web Apps, websites & collaboration, and instant messaging & online meeting. After completing this course, you and your team will be able to work from anywhere, on any device, and at any time using Office 365.

Learning Objectives

- List the benefits of moving services to the cloud
- Differentiate Office 365 from competitors
- Identify which Office 365 plan is right for you and your team
- Configure Office 365, including email and SharePoint
- Utilize Office Web Apps to create documents and collaborate with team members

Note: NOT a hands-on course

Who should attend: Accountants and business professionals who wish to evaluate and learn how to setup, configure and use Office 365

Seminar Leader: *(Instructor Bios Pages 24 & 25)*
Ward Blatch, CA, MCSA

Jun 7	PD12130251	ICANS
Member: \$155	Passport Valid	8:30am-12pm
Non-Member: \$190	½ Passport Day	3.5 PD Hrs

Computer Applications Training

For the members interested in registering for computer applications training sessions we have an agreement with ctc TrainCanada allowing ICANS' members to register for any of the following sessions at a reduced price.

You can register for any level 1 and 2 computer application course for \$225/person/day and any level 3 or advanced course for \$265/person/day. We trust that this will meet your needs sufficiently.

To register contact ctc TrainCanada at 442-6967. **You must identify yourself as being an ICANS member and pay via credit card. Please ensure that you track these hours for your professional development reporting.**

For detailed course outlines and dates visit www.traincanada.com

Passport Invalid

- Excel Level 1 or 2
- Excel level 3
- Outlook – Level 1 or 2
- PowerPoint Level 1 or 2
- Word – Level 1, 2 or 3

Members can also register for other desktop application courses such as Access, Project, HTML and Front Page at a 10% discount off list rates.

ctc TrainCanada does not cancel any desktop application courses due to low enrolment. If they have a course with only one or two students registered, they will still run the course. The trainer will personalize the course to meet your specific requirements and objectives.

Other computer application training opportunities available, contact ctc TrainCanada at 442-6967 or email Mary Bobyk-Lewis at maryb@traincanada.com.



PD On Audio

Now Web-Based and Eligible for Verifiable CPD Hours!

PD on Audios 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.

These titles are now eligible for Verifiable CPD Hours – in order to claim these hours as verifiable, you will be required to successfully complete a short quiz, also accessible via the website. Upon successful completion of the quiz, you will be able to print a certificate of completion.

Passport Invalid

How to get started:

After you purchase your PD on Audio title(s), we will email you a web link where you can download the MP3 file to your own computer. You will also be able to download any available handouts or PowerPoint slides for that seminar in PDF. If the audio title is available, you will receive the email within one working day after your order is processed. After you have finished with the audio, you can return to the webpage and complete the quiz.

- all “NEW” and “UPDATED” PD on Audio titles will be available two weeks after the classroom seminar date – please take this into consideration before placing your order
- most titles are recorded from Executive Breakfast sessions, and are eligible for **2 Verifiable CPD hours** each – half-day sessions are eligible for **3.5 Verifiable CPD hours each**

All PD on Audio CDs are \$65 each + HST unless otherwise noted.

See link below to view and order PD on Audio and E-Learn PD from the Institute of Chartered Accountants of British Columbia.

<http://www.icabc-pd.com/pd-products.php>



Instructor Bios

Ward Blatch, CA, MCSA, provides computer training, network support, and network evaluation to accounting firms, small businesses, and professional organizations in Canada and the United States. With over 20 years' experience in public accounting and over 12 years in networking offices ranging in size, 3 to 80 users, he understands the frustrations and knows what is needed to make your computers and staff work effectively.

David Cameron, CA is a Senior Manager in Deloitte & Touche LLP's Halifax Tax Group. He has more than thirteen years of experience in public accounting, including more than seven years' 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 investment holdings. 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.

Blair Cook, CA, CPA, MBA works for Smartfirm Interactive developing live and web-based finance learning experiences. Blair also instructs at St. Mary's University and the Atlantic School of Chartered Accountancy. Blair currently serves as a director and Audit Committee member of a publicly traded company. He has fulfilled the CFO role in a number of privately held and publically traded entities in recent years.

Tammy Crowell, CA, MBA is an instructor and case leader for the Atlantic School of Chartered Accountancy. Tammy has marked the Uniform Final Evaluation since 1996 and provides UFE training services to many CA students on a regional and national level. Tammy is also presently employed as a full time instructor at Dalhousie University in the School of Business. For many years, Tammy has instructed professional development courses for ICANS.

Jill Devanney, CA, graduated with a Bachelor of Business Administration from Mount Saint Vincent University in 2006. She joined the Office of the Auditor General of NS in the same year and obtained her CA designation in 2008. She is currently a Financial Accountant with the NS Department of Finance, where she provides financial accounting support to government departments and contributes to the preparation of the Province's Consolidated Public Accounts. Jill is also heavily involved with the Atlantic School of Chartered Accountancy (ASCA). She not only develops ASCA content but also facilitates numerous UFE candidate workshops each year. Her professional activities have given her extensive experience in the interpretation and application of Public Sector Accounting (PSA) standards, International Financial Reporting Standards (IFRS), Accounting Standards for Private Enterprises (ASPE), and Canadian Auditing Standards (CAS).

Duncan Ferguson, CA is the Director of Tax for the Armco Capital Group of Companies based in Halifax, NS. He is responsible for coordinating and implementing tax planning and compliance for a diverse group of privately held companies. Prior to joining Armco Capital Duncan was a Senior Manager in the Tax Group of Grant Thornton LLP in Halifax. Duncan has previously presented courses for ICANS, CICA and ASCA dealing with various taxation topics.

Michael Frenette (PMP, I.S.P., CMC, MCITP) is a principal in the Risk Management and Information Technology department of Sierra Systems, an IT consulting firm founded in the 1970s and headquartered in Vancouver. His areas of expertise include portfolio, program and project Management, virtual teaming, collaboration portals, SharePoint governance and enterprise project management approaches and tools. Mr. Frenette gained technical expertise in the early days of his career in Information Technology, later moving into management roles in the mid-eighties. He has served on the boards of the Canadian Information Processing Society and the Project Management Institute and currently chairs PMI Global's Technology Member Advisory Group. Mr. Frenette holds professional certifications from CIPS, CAMC and PMI.

Kate Horne, CA is an Assurance & Advisory Senior Manager with Deloitte in Halifax. She has 10 years of public accounting experience providing assurance and advisory services to private and public companies. She specializes in providing complex accounting assistance and advice including IFRS, conversion services, regulatory reporting and public offerings.

Rob Jeffery, CA, CPA is the Director of Taxation for Sobeys Inc. Prior to accepting this role, he was a Senior Tax Manager with Deloitte in their Halifax office. He has experience in tax and succession planning for owner managed businesses, along with experience in corporate reorganizations, real estate taxation, and international taxation. Rob has tutored the CICA In Depth Tax course, taught a number of ICANS courses and has worked with ASCA to assist CA students working towards successful completion of the UFE.

Greg Leslie, CA is a Senior Manager in the tax practice at Collins Barrow Nova Scotia. Greg works primarily with owner managed small and medium size businesses, with experience in tax planning and compliance for corporations, trusts, and individuals, reorganizations, estate planning, and charitable organizations. He was admitted into ICANS in 2004. Greg has completed Part III of the CICA In-depth Tax program. He has lectured and tutored for ICANS and CICA and has presented on income tax matters to a variety of local and regional business organizations.

Randy Linzel is an engineer by profession and started Leadership by Design in 1998 after progressing through the corporate world, experiencing leadership first hand and receiving intensive business management training. Randy has worked extensively in system design and alignment with large corporate clients worldwide including corporations in Europe, Canada, USA, and Australia. He is a sought after speaker at conferences on leadership and system design internationally. Randy's passion is working with organizations to remove the bottlenecks in systems and inverting the hierarchical structure pyramid with regards to leadership.



Instructor Bios

Dr. Steve McEvoy is a leader of leaders. With a completed doctorate in Leadership and Organizational Development, Steve works with leaders in the business and non-profit sector with a focus on their personal development. Steve specializes in helping leaders capture and clarify the vision and mission that they are currently leading and position themselves to effectively lead the entire organization in the direction of that vision. Steve also has a specific focus in helping leaders gain personal clarity concerning their unique design. From these discoveries, a plan of action is implemented to lead the entire organization into similar discoveries. The end result of this process is a greater work environment resulting in greater efficiency and productivity in the entire corporation.

Susan McIsaac, FCA is a partner in a general practice firm in Amherst. She is a member of the Standards Committee of the AC Group of Independent Accounting firms, and is a member of the Practitioner's Forum Committees of ICANS and Small and Medium Practices advisory committee of CICA. Susan has instructed multiple PD offerings for ICANS for many years.

Eileen Pease, BA, B.Ed., M.Ed., CHRP, is President and founder of Dynamic Learning Inc., a company devoted to enhancing people's ability to grow and learn by working with their thinking skills. As a facilitator she has led executive, supervisory and management groups across Canada and the United States. Eileen is a senior consultant with Knightsbridge MICA Management Resources (Toronto, ON) and is certified by the Management Research Group (Portland, ME) to facilitate their assessment-based development system in Leadership 360^o™ and Strategic Leadership Practices™. Eileen has been facilitating interaction within groups ranging from a few people to over 100 people since 1991. Her facilitation has been for as little as two hours, or as long as nine months. She has facilitated creative thinking, problem solving, strategic planning, and relationship sessions with front line employees, supervisors, managers, executives, and CEOs in homogenous and mixed groups. Eileen plans to publish her book called *Get More Power from Your Brain* before the end of 2011.

Debi Peverill, CA is the owner of Peverill and Associates Inc. operating in Bedford. Debi practices mainly in the area of owner managed enterprises and tax compliance work. She has lectured during ICANS' PD program for many years and also lectures at both Dalhousie and Saint Mary's Universities.

Henry Visser, CA, LLB, TEP is a partner in the Tax Group of McInnes Cooper in Halifax. He practices in the area of tax law with an emphasis on personal, corporate and estate tax planning, as well as commodity taxation (GST/HST and provincial sales tax), including such matters as estate freezes, crystallizations, succession planning, creditor-proofing, corporate structuring and restructuring, inbound and outbound investments and unlimited liability companies. Henry also has expertise in drafting income and sales tax legislation. Henry has written and presented for the Canadian Bar Association (Nova Scotia), the Institute of Chartered Accountants of Nova Scotia and at the Atlantic Provinces Tax Seminar, has written for the Resource Sector Taxation Journal and is a frequent contributor of articles to McInnes Cooper's Tax Brief and Tax Flash publications.

Mara Vizzutti, B.Ed., ACC is an ICF certified coach, a seasoned facilitator and principal of New Avenue Leadership. Mara has worked in the field of personal/professional leadership development since 1994. Originally from Alberta, she worked for a highly-respected San Francisco based training company managing the Calgary operation, later delivering group coaching solutions and conducting seminars in personal leadership effectiveness. Since moving to the Maritimes, Mara has worked with a number of organizations to increase communication effectiveness and engagement in the workplace. Mara is committed to transforming the process of business communications and facilitating collaboration, connection and healthy relationships in the workplace. She is passionate about the power of adopting a coaching mindset and approach as a means to transforming our thinking and practices about management and leadership. Mara effectively trains leaders and supervisors in the skills necessary for creating coaching cultures and learning organizations.



E-Learning

Interactive On-line Seminars

ICANS is pleased to continue to offer the following two-day seminars converted into two-month interactive on-line 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 two-day classroom course, the Institute 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.

Member \$440*

***PD Passport Holder \$340**

May 13 to July 16, 2012

Oct 15 to Dec 31, 2012

Non-Member \$540

PD Passport Discount

14PD Hrs

ASPE: A Survey of the Standards

Level: Intermediate **DL12130011 & DL12130061**

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. *(In class session page 10)*

Auditing in the New CAS Environment

Level: Introductory **DL12130021 & DL12130071**

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 they key elements of an engagement working paper file. *(In class session Page 13)*

IFRS: A Survey of the Standards

Level: Introductory **DL12130031 & DL12130081**

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 Planning

Level: Introductory **DL12130041 & DL12130091**

This seminar provides an excellent overview and general refresher on corporate income tax matters. The primary target audience for this seminar is CAs 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. *(In class session Page 19)*

Income Tax Refresher for Personal Tax Planning

Level: Introductory **DL12130051 & DL12130101**

This seminar provides an excellent overview and general refresher on personal income tax matters. The primary target audience for this seminar is CAs 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.



Additional PD Opportunities



The Canadian Payroll Association

The Canadian Payroll Association delivers comprehensive educating for business professionals who have a functional responsibility for payroll. The CPA has represented the payroll community for more than 30 years. CPA seminars will help members and their staff enhance and adapt payroll operations, meet new legislative requirements, address changing workplace needs 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.

HR Fundamentals for the Payroll Professionals

Level: Introductory

This seminar is a dynamic, interactive seminar designed for payroll professionals who want to build their HR skills toolkit and add further value to their organizations. As the role of payroll professionals continues to grow and evolve in organizations, a higher level of responsibility for "Human Resources" issues, or the "people-side" of the business, is being expected. Today's payroll professionals are increasingly more involved in a variety of HR activities, either directly or indirectly. To increase your value and contribution to the organization's Payroll/HR team, it is important to understand the role of HR and its impact on the entire organization.

Topics Covered:

- The Role of Human Resources and Key Skills
- Employee Relations
- HR Policies, Employee Handbooks and Metrics
- Candidate Recruitment and Selection
- Managing Employee Performance
- Remuneration, Reward and Retention Programs
- Compliance with Employment Legislation
- Ending the Employment Relationship

Oct 19 CP12130041 8:30am-4:30pm
 Cost: \$375 7 PD hours

Location TBA

***Passport Discount \$120, counts as 1 passport day**

Learning Payroll II

Level: Introductory

This seminar expands on the concepts from Learning Payroll I by exploring more complex processes and government requirements. It is a comprehensive, interactive seminar designed for:

- New staff with no or limited exposure to payroll and junior payroll staff
- Practitioners returning to the payroll field
- Other professionals who have functional responsibility for payroll
- Suppliers providing payroll services to corporate customers.

Although Learning Payroll I is not a prerequisite, it is strongly recommended.

Topics covered:

- Taxable earnings
- Allowances
- Overview of common taxable benefits
- Termination of employment
- Introduction to garnishments

Jun 8 CP12130021 8:30am-4:30pm
 Cost: \$375 7 PD hours

Holiday Inn Express, 133 Kearney Lake Rd, Halifax

***Passport Discount \$120, counts as 1 passport day**

Learning Payroll I

Level: Introductory

This seminar is a comprehensive introduction to the payroll function for:

- New staff with no or limited exposure to payroll and junior payroll staff
- Practitioners returning to the payroll field
- Other professionals who have functional responsibility for payroll
- Suppliers providing payroll services to corporate customers.

Participants learn about processing and reporting requirements and the payroll practitioner's key role in government statutory withholding and remittance.

Topics covered:

- Introduction to payroll
- Processing a payroll
- Employment/Labour Standards
- Government reporting
- Records retention

Jun 7 CP12130011 8:30am-4:30pm
 Cost: \$375 7 PD hours

Holiday Inn Express, 133 Kearney Lake Rd, Halifax

***Passport Discount \$120, counts as 1 passport day**

Special Payments & Completing the ROE

Level: Intermediate

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). It is ideal for:

- 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.

Topics covered:

- Special Payments
- Payments at Termination of Employment
- Top-up Payments
- Other Special Payments
- The Record of Employment (ROE)

Jun 22 CP12130031 8:30am-4:30pm
 Cost: \$375 7 PD hours

Holiday Inn Express, 133 Kearney Lake Rd, Halifax

***Passport Discount \$120, counts as 1 passport day**



Additional PD Opportunities

Passport
Invalid

CICA Continuing Education 2012

CICA Continuing Education provides an extensive portfolio of training and professional development products that deliver new skills, knowledge building and increasing competencies. The programs are designed to meet the continuing education requirements for Provincial Institutes/Ordres and other professional associations.

For additional information on CICA Continuing Education conferences and courses, visit: www.cpd.cica.ca

INCOME TAX

The NEW CICA In-Depth Tax Course

For more information, visit: www.cpd.cica.ca/incometax

CICA In-Depth Tax Course – Part 3

August 18-22, 2012, Niagara Falls, ON

National Conference on Income Taxes

September 12-14, 2012, Toronto, ON

Income Tax Practice Course - West

November 3-9, 2012, Canmore, AB

Foundations in International Tax Course

November 3-7, 2012, Whistler, BC

Advanced Tax Issues for the Owner-Managed Business Course

November 10-14, 2012, Mont Tremblant, QC

Corporate Reorganizations Course

November 24-28, 2012, Niagara Falls, ON

INDIRECT TAX

CICA In-Depth HST/GST Course

May 27-June 1, 2012, Niagara Falls, ON

ADVANCED HST/GST COURSES:

Financial Services Course

June 14-15, 2012, Toronto, ON

Cross-Border Transactions Course

November 15-16, 2012, Toronto, ON

Public Sector Bodies Course

November 19-20, 2012, Toronto, ON

CICA Commodity Tax Symposium

October 1-2, 2012 (optional workshops Sept. 30, Oct. 3)
Ottawa, ON

Commodity Tax Symposium - West

March 2013, Calgary, AB

TRANSFER PRICING

CICA In-Depth Transfer Pricing Course

Part I: eLearning – Fall 2012

Part II: In-Residence - TBA

IFRS/FINANCIAL REPORTING & GOVERNANCE

IFRS Specific:

IFRS Self-Study Learning and Certificate Program

Available Now at www.cpd.cica.ca/IFRSSelfStudy

IFRS Immersion 1 Course (core topics)

April 16-19, 2012, Toronto, ON

August 13-16, 2012, Halifax, NS

IFRS Immersion 2 Course (specialized topics)

June 12-15, 2012, Calgary, AB

September 10-13, 2012, Toronto, ON

Other Financial Reporting & Governance Programs:

Financial Reporting Conference for the Oil and Gas Industry

June 6-7, 2012, Calgary, AB

Public Sector Financial Reporting and Accounting Course

September 5-7, 2012, Ottawa, ON

February 11-13, 2013, Ottawa, ON

Financial Reporting and Accounting Conference (IFRS and ASPE)

September 24-25, 2012 (optional workshops Sept. 26)

Toronto, ON

Public Sector and Not-For-Profit Financial Reporting Conference

October 10-11, Ottawa, ON

CICA Conference for Audit Committees

November 20-21, 2012 Toronto, ON

Financial Reporting Conference for the Mining Industry

December 5-6, 2012, Toronto, ON

UNIQUE PRACTICE AREAS & INDUSTRIES

CICA National Conference for SME Advisors

August 8-10, 2012 (optional workshop Aug. 7) Halifax, NS

In-depth Brokers and Investment Dealers Course

Presented in cooperation with IIROC

September 19-21, 2012, Toronto, ON

Investigative and Forensic Accounting Conference

October 23-24, 2012 (optional workshop Oct. 22), Toronto, ON

CICA Business and Industry Conference

November 21-22, 2012 (optional workshop Nov. 20)

Toronto, ON

Canadian Conference on IT Audit, Governance and Security, and Fundamentals of IT Audit - Workshop

March 2013, Toronto, ON

CORPORATE FINANCE

Corporate Finance eLearning Courses

For more information, visit: www.cpd.cica.ca/CF

Valuation in Corporate Finance Course

September 24-25, 2012, Toronto, ON

October 9-10, 2012, Calgary, AB

Debt and Equity in Corporate Finance Course

November 2012, Toronto, ON and Calgary, AB

Making Corporate Finance Work Course

January 2013, Toronto, ON and Calgary, AB

Advanced Corporate Finance Course

Fall/Winter 2012-13, Toronto, ON

CICA Corporate Finance Briefs

Presentations in selected cities across Canada

Dates will be posted at: www.cpd.cica.ca/CF

Note: All events, dates and locations subject to change.



Additional PD Opportunities



Passport
Invalid

Institute of Chartered Accountants of Ontario (ICAO)

Executive Development Programs

Location: White Oaks Conference Resort & Spa, Niagara-on-the-Lake, Ontario

Through the cooperation of the Provincial Institutes, ICANS' members are invited to take part in the ICAO Executive Development Programs. The ICAO Executive Development programs are a series of acclaimed in-depth programs developed to meet the needs of finance professionals.

Leadership Series:

Becoming CEO (and Staying There): Acquiring the Leader's Edge – July 23 – 26

Are you CEO material? And, if you already are one, do you have what it takes to stay at the top? After all, over 40% of CEOs flame out within their first 18 months. This one of a kind program provides you with the roadmap to get to the top and then help you succeed in your new role. Topics include: the Opportunity and Realities of CEOdom; The Challenges of Leadership; Getting There and Staying There – Tools & Perfecting Critical Skills, The CEO as Chief Decision Maker, Beyond the First Quarter and The Responsibility of Leadership.

The Optimal Negotiator – November 13 – 16

Arguably the one skill today's leaders must possess is the ability to get people to agree with them. In any undertaking of significance, whether personal or business related, knowing how to get others to accept your point of view while seeing themselves as winners is crucial to **your** success, if not the prosperity of your organization. Indeed, one cannot ever expect to ascend the corporate ladder without a sound grasp of the fundamental negotiating principles and nuances or without the knowledge and skills to emulate those who consistently do it well.

The Master Strategist – December 9 – 12

Great strategy matches existing or acquired corporate competencies and resources with economic opportunities while mitigating risk to the corporation. Those managers who are successful, through generating bottom line results, improved market share, reinventing the corporate culture, and/or strengthening brand – move to the top echelons of their organizations. Reacting to everyday demands and crises often leaves little time to continuously evaluate your corporations' strategy. Take this opportunity to step back and be The Master Strategist.

The Controllership Program:

Operational Skills – (3 Offerings) - June 10 – 13, July 22 – 25, and October 28 – 31

Polish your financial skills. Learn about leading-edge developments in finance. Develop your analytical skills. Understand new developments in internal control and compliance. Obtain new insights in how to reduce costs and improve efficiency. Improve the financial reporting process and ensure the integrity of the numbers. These are the Controller's core competencies. Become the financial expert in your organization – the go-to finance manager who can develop and interpret financial and operational metrics and provide decision support for key executives.

Management Competencies – November 11 – 14

In Part 2 of the Controllership Program, you will focus on your coaching and supervisory, team building and presentation skills and devote time to the enhancement of your personal development. The course emphasizes practical approaches and the sharing of best practices in a stimulating and collaborative setting. You will leave with established priorities and plans for what you want to change in the period ahead and the skills to accomplish it. Your company will profit from your ability to build high-performance teams, and aptitude for implementing business process improvements.

The CFO Leadership Program:

CFO Operational Skills – October 14 – 17

This program delivers the core CFO competencies that organizations expect and demand. Get up to speed on corporate governance and risk management and the latest tools and application. Examine the relationship of strategy and risk-taking. Nail down the planning, budgeting and internal control competencies that facilitate efficient and effective operations. Explore CFO competencies in business valuation, business intelligence, and intellectual property. Learn how to effectively communicate the core finance and operating results for internal and external stakeholders.

CFO Leadership Competencies – November 18 – 21

Organizations with skillful leadership consistently outperform those with less effective management. Your organization will benefit from having a more self-assured finance team leader, your enhanced abilities to contribute to organizational core values, and your ability to communicate effectively with your stakeholders. You will learn how to improve your performance as a strategic business partner to the key stakeholders in your organization and how to enhance your capabilities as a leader. This program delivers "beyond the theory" training in leadership, executive communications, management, and CFO political skills. You will return to your office with significant insights into how you can improve your individual and team performance.

Finance Series:

The Value Driven CFO – June 25 – 28

The role of the CFO and the finance function within an organization has changed – the focus is now on being a business partner to the CEO/Board to maximize the value of the organization through strategic and tactical decisions driven by business insights. The CFO needs to understand risk and reward trade-offs – understand how the organization may fail and what it takes to succeed. The CFO needs to know how to value the business models within their own organization and those of the competition – and what value drivers to monitor. The CFO needs to measure and manage enterprise performance coupled with analytics, scorecards and incentive design to maximize value to the organization. **Shareholder value.** Create it, enhance and refine it, acquire it, link strategies that support it, and create a reporting architecture to drive it through the enterprise.

The CFO as Navigator – November 25 – 28

While Fortune 500 firms can afford the luxury of "silo" management, many organizations now require CFOs to not only understand and appreciate non-financial parts of their business, some are entrusting the CFO with the key responsibilities of information management and corporate strategy. This program is dedicated to providing you breadth and depth in key areas such as dashboards, performance metrics and process maps, information management and business intelligence, platform design and creation, corporate strategy, talent management and incentive design. This program is designed to make you a complete CFO. It is not meant to convert you into the VP-HR or the Chief Information Officer, but to provide you with enough depth to either manage these functions or to communicate effectively to these counterparts with knowledge and confidence.

For full program descriptions, testimonials and registration information please visit: <http://www.icaon.ca/PDExec>

If you have questions please contact: Lawrence Wong CA, Associate Director, Professional Development, Office: 416 969-4343
Toll free: 1-800-387-0735 Ext. 343 e-mail: lwong@icaon.ca



(902) 425-3291



pdreg@icans.ns.ca

29



1791 Barrington St., Ste. 1410
Halifax NS B3J 3L1



(902) 423-4505



Additional PD Opportunities

Executive Leadership Programs
Designed to take you beyond the technical



Go beyond the technical and elevate your performance to gain the competencies you need to successfully lead others, lead teams, lead the financial function and lead organizational transformation.



This intensive program is designed for those CFOs and aspiring CFOs who are determined to move their career and their organizations forward. Building on core financial skills, it 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 12 – 18, 2012, October 20 – 26, 2012 – Banff, AB

For more information visit www.cfoleadership.ca, email cfoleadership@icaa.ab.ca or call **1800-232-9406**.



Designed for financial professionals who are determined to move their career and their organization forward. This intensive program is ideal for individuals currently in a controller role or aspiring to the role, who want to make a more profound impact in their organization.

Participants have included Corporate and Business Unit Controllers, Assistant Controllers, Comptrollers, Finance Directors, Finance Managers, Accounting Managers, and Financial Analysts.

November 24 – 30, 2012 – Banff, AB

For more information visit www.controllership.ca, email controllership@icaa.ab.ca or call **1-800-232-9406**.

At Dalhousie University
MBA Financial Services



Have you considered completing an MBA with a focus on financial services for your professional development plan? You can advance your career with our **MBA Financial Services** degree.

Our internationally recognized program includes:

- Facilitation by a world-class cadre of academic and industry experts
- Proven, successful delivery of graduate programs designed for working professionals
- Blended learning: on-line/on-site format



For more information:

visit mbafs.management.dal.ca

call **494-6391** or **1.800.205.7510**



Executive and Professional Development Opportunities

At Saint Mary's University



ICANS 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 ICANS, members in good standing will receive a **10% discount on any seminar** offered by Saint Mary's University Executive and Professional Development*.

At Executive and Professional Development we concentrate on you by providing:

- instructors who focus on the most important skills you need
- classes conveniently scheduled to fit your busy work schedules
- professional staff that care about your learning experience

From now until June 2013, choose from over 60 different seminars and certificate programs that will suite any stage of your career.

For more information:

visit epd.smu.ca

call **420.5638** or **1.800.877.0874**



*Please identify yourself as an ICANS member and provide your member number to receive the 10% discount



FAQs

PD Materials

1. Why is the material controlled?

The material is controlled because the Institute uses this method to track if a member has attended the courses they've registered for on the PD Registration Form. The information on the registration form is used for recording in the Mandatory PD Reporting section of the members' database and must be accurate.

2. Why can't I receive the material if I don't attend? or Why can't I pick up material for another registrant at my firm if they can't make it?

- a. The course material for many of the courses offered are developed on a national basis through other Provincial Institutes for the sole purpose of the PD seminars.
- b. Course materials that are developed locally remain the property of the individuals who have been contracted to develop and present the course to ICANS' members.
- c. The Nova Scotia Institute does not hold the copyright to the material, which means the material, cannot be reproduced for sale on an individual basis.

3. Why can't I have the material for a course that is scheduled at the same time as the course I'm registered for?

Again, the material is not the Institute's to sell on an individual basis (please refer to question 2).

PD Passport Questions

1. Do I have to register for 5 full-days to take advantage of the PD Passport?

No, you can register for as many full and half-day courses you would like as long as they **total no more** than 5 full-days to be included on the PD Individual Passport. Members may now take additional passport valid courses at a reduced rate to enhance your passport purchase.

2. Why can't I be replaced by someone on my individual passport?

The individual passport is sold to the individual to reduce the per course cost of multiple registrations for an individual and is non-transferable. The organization PD member and non-member passports are in place to allow for multiple CAs and employees to use the same passport at a cost savings.

3. Why can't I register for a passport after the deadline if I'm willing to pay the penalty fee per course?

It is necessary to impose a deadline date to allow sufficient time to make final course decisions and to handle the administration of the program.

4. Why can't I take advantage of the cost savings I get with my PD Passport throughout the whole year vs the fall/winter?

You can purchase a PD passport for the spring session and take advantage of the reduced cost savings for the whole year, May 1st until April 30th the following year, this still entitles the individual passport the equivalent of 5 full-days and the organization passport the equivalent of 9 full-days. An added bonus is that members can take additional passport valid courses once a passport is purchased at a reduced rate.

Other PD Questions

1. Why can't I cancel the course the day before?

You are not able to cancel after the deadline date because your registration is taken into account when the financial decision to run the course was made. Also, if the course is filled to capacity, the Institute might have turned away other participants or bumped non-member registrations to make room for your registration. The Institute policy is consistent with virtually any other organization which delivers training courses.

2. Why is the penalty fee the same for a full-day course as it is for the half-day course?

The penalty fee is the same for full-day and half-day because this is an administrative fee to cover the processing costs related to a cancellation. The PD Brochure is normally mailed out allowing at least six weeks for mailing and return to the Institute before the deadline, this is felt to be a sufficient amount of time to adjust your calendars to attend. Administratively a full-day and half-day course is the same amount of work per registration so the penalty is the same.

3. Why can't I switch courses after the deadline?

A deadline is necessary to allow time for the Institute staff to prepare course material, registration lists and make administrative decisions on class sizes and placement.

4. There are usually cancellations or "no shows" why can't I take their place in the course? or Why can't I attend a course or "just sit in" on the course during the week if I find my schedule has been freed up?

For obvious reasons, it is only fair that all seminar attendees have paid the necessary registration fees and abided by the same rules and policies. When seminars are "sold out" a decision has been made that a larger participation would diminish the effectiveness and quality of the seminar.

5. I don't mind attending PD courses, but find that the Institute only offers a minimum amount of courses in areas of interest to me. Why should I subsidize other people's training through the Institute and then have to go elsewhere for my own seminars?

This question raises two issues. First of all, the Institute's PD Program is a self-funding activity which is intended to operate on at least a break-even basis. Accordingly, members who do not attend the PD Program are not subsidizing those that do. Secondly, while the Institute attempts to offer a wide range of courses which will be of interest to Chartered Accountants both in and outside public practice, it would be impossible to attempt to address all the PD needs of each and every member.

There are many in-house training programs and courses offered by universities, other professional associations, and entrepreneurial training companies which are of the highest quality and offer specific training in areas which would be impossible for the Institute to offer. In addition, there seems little point in competing with these sources if Chartered Accountants can attend the sessions at a suitable time, location and at a reasonable cost.

Given the above, it is not surprising that many of the courses offered by the Institute are fairly technical, core topic courses which would be of interest to Chartered Accountants but may not be broad enough for other agencies to offer in the market.

6. How can I become an instructor for ICANS?

Just phone, email or write to Kathie at the Institute office, we are always happy to add new instructors to our database.

Further questions? Please call Kathie Slaunwhite, PD Director at (902)425-3291, fax (902)423-4505 or email kslaunwhite@icans.ns.ca.



Continuing Professional Development - 2008 And Beyond

Members are referred to the ICANS' website www.icans.ns.ca Continuing Education tab / Mandatory CPD as well as the Bylaws for more complete information on this area.

The highlights of the CPD :

1. Members are required to complete the following minimum PD learning activities:
 - A. A minimum of 20 PD hours in each calendar year; and
 - B. A minimum of 120 PD hours in fixed three year periods, including at least 60 hours of verifiable study. (reference ICANS' Bylaw 70)
2. All members, other than inactive members or those otherwise granted a waiver, are required to meet the minimum requirements. (reference Bulletins #1/#4)
3. Eligible PD learning activities remain the same as in the past, although there is the requirement for "verifiable" study. (reference Bulletin #2)
4. Members are required to file annually a PD report which sets forth their hours of PD learning activities. (reference Bulletin #3)
5. Members are required to retain appropriate documentation which supports their PD reports and, upon request, make this information available to ICANS. (reference Bulletin #3)
6. ICANS has introduced policies/procedures for purposes of verifying PD reports. (reference Bulletin #3)
7. The PD Committee will continue to grant waivers to individual members based on individual circumstances or classes of members. (reference Bulletin #4)

3 Year Cycle

**Current fixed 3 year cycle –
Commencing: January 1, 2011
Ending: December 31, 2013**

If you have further questions or concerns, please contact **Greg Crosby**, CA, LLB, ICANS' Director, Regulatory Affairs, at (902) 425-3291 ext. 24 or at gcrosby@icans.ns.ca.

Also on the ICANS website, Continuing Education – Mandatory PD, you will find:

- **Bulletins**
 - #1 - Applicability
 - #2 - PD Learning Activities
 - #3 - Reporting / Verification / Documentation
 - #4 - Waivers
 - #5 - Reduction in ICANS' PD Course Fees
- **CPD Log**
- **Sample Learning Plans**
 - Academia
 - Industry – Accounting Position
 - Industry – Executive Position
 - Industry – Non-financial Position
 - Public practice – Large firm
 - Public practice – Mid-size Firm
 - Public practice – Sole Practitioner
 - Public sector

CA Competency

The CA profession has undertaken a detailed analysis of the core knowledge and skills expected of CAs by business, government and the public. Working with members, clients and employers, many clear expectations - or competencies - of our profession have been identified. These competencies are laid out in *The UFE Candidates' Competency Map*, which is used as the basis for our qualification process and in the continuing development and enhancement of our PD Program.

The UFE Candidates' Competency Map provides a profile of the CA profession, not of the individual CA. It can, however, prove useful in helping shape your own PD opportunities that will help you to meet your career goals.

Pervasive qualities and skills

These skills include:

- ethical behaviour and professionalism
- personal attributes such as accountability, adaptability to change and the ability to self-manage, take initiative and add value
- professional skills such as communication, problem solving and management

Specific competencies

- governance, strategy, and risk management
- performance measurement and reporting
- assurance
- finance
- management decision making
- taxation

To learn more about *The UFE Candidates' Competency Map*, please refer to "CA Skills and Competencies" under "Becoming a CA" on: www.cica.ca.





The Institute of Chartered Accountants of Nova Scotia
1791 Barrington Street
Suite 1410
Halifax NS B3J 3L1

Please direct course enquiries to:
Kathie Slaunwhite Phone # (902)425-3291 ext. 23
Email: kslaunwhite@icans.ns.ca

Please direct registration enquiries to:
Danielle Roode Phone # (902)425-3291 ext. 31
Email: droode@icans.ns.ca