Dear Members:

Welcome to the Continuing Professional Development (CPD) 2015 spring brochure, featuring a number of informative, relevant and affordable options for you to grow and develop as a professional. Through this unification transitional period, we are dedicated to ensuring all members of the Nova Scotia legacy bodies have the same access to the available professional development courses.

You will note that PD registration fees, including the passport fees, have increased this year. This is the first increase since 2010 and with this increase, our pricing still remains below the average pricing per day across Canada.

This brochure includes reoffering of some of the fall/winter half, full and two-day sessions developed by the interprovincial Professional Learning and Development Programs Committee (PLDPC), repeat entrepreneurial sessions and new offerings.

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

For members’ convenience, ICANS offers on-line functionality for the purposes of:

- Viewing details of your ICANS’ PD learning activities;
- Reporting your other PD activities;
- Viewing a log of your reported PD hours;
- Viewing a summary of hours completed for each year in a reporting cycle as well cumulative totals for the 3-year cycle;
- Submitting your PD Report electronically; and
- Requesting relief in relation to a member’s inactive status, temporary leave from workforce or extraordinary circumstances.

To find out more about this on-line functionality and to log in, please go to the following link on the ICANS’ website: www.icans.ns.ca under the Professional Development tab select Online CPD Reporting for more information. This brochure includes a description of ICANS CPD requirements, see CPD Requirement section. Additional information concerning ICANS current PD policies can be found under Professional Development tab Mandatory CPD on the ICANS website.

Also, ICANS accepts event registrations on-line. To register on-line go to www.icans.ns.ca, on the welcome page click on the “Member On-Line Registration” button. The first time you login you will need to set-up your account; your username is your 6 digit member number, located on your fee invoice in the address box Reference#. Initially, you will also need to set up your password by clicking on “Create/Reset My Password”. Please ensure you use the preferred email address that you use to receive emails from ICANS. You will then receive an email prompting you to create your password.

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

ICANS reminds you that our Personal and Organization Passports (see Registration Information and Conditions) are your most cost-effective payment choice. Passports are on sale now until May 4, 2015.

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.

Kathie Slaunwhite
Director, Professional Development
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<tr>
<td>18</td>
<td>19</td>
<td>20 AM</td>
<td>21 PM</td>
<td>22</td>
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**MAY 2015**

| 8      | 9       | 10 AM     | 11 PM    | 12     |
|        |         | iPad - An Effective Business Tool PD15160131 | Taxation of Employee Benefits PD15160371 | Corporate Treasury Management PD15160071 |
|        |         | Technology for Accountants - Don’t Get Left Behind PD15160141 | Employment Law A-Z PD15160181 |        |
| 15     | 16      | 17 AM     | 18 PM    | 19     |
|        |         | Retirement Planning PD15160231 |        |        |
| 22     | 23      | 24 AM     | 25 PM    | 26     |
| Financing Strategies PD15160091 | Strategic Relationship Skills for Influence PD15160241 | Estate and Probate Planning - Using Trusts Tax-Efficiently PD15160261 | Income Taxation of Portfolio Investments for Individuals PD15160331 | Compilation Engagements PD15160031 |
|        |         |        | GST/HST & Real Property PD15160281 | Effective Use of Analytical Procedures PD15160041 |        |
| 29     | 30      |          |          |        |
| Dealing with Difficult People PD15160171 | Get More Power from Your Brain PD15160191 |          |          |        |

**JUNE 2015**
Watch for the following references throughout the catalogue:

**PD14150101** These numbers under the course title represent the Course number for registration purposes.

**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 CPD requirements in the database.

**Member Pricing** Available to CAs, CMAs and CGAs who are members of a Provincial Body.

Comments From Previous Offerings:

**Accounting, Auditing and Professional Practice Update**
Great course for keeping up on current events for small practitioners.

**Breaking Up is Hard to Do**
Excellent course and highly recommended to all CA’s in public accounting and involved in business, tax and estate planning.
- Topic coverage is unique - it’s an issue clients ask about and getting high level background on it is helpful.
- This is the best course I’ve taken over my many years of taking PD. It is very relevant to most practitioners in public practice in servicing their clients, though they may not realize it until taking this course. It was a course that was long overdue.

**Practical Project Management**
It was a great course for an overview of project management.
- Great intro course.
- Formalized some of the things that I’ve already been doing.
- Interaction with the class and instructor, real life examples.

**Compilation Engagement**
Covered subject very well. I particularly liked the sample engagement file. The instructor did a very good job of keeping people interested & participants involved.
- Excellent update/refresher.
- Topical area, current developments, current trends.

**Due Diligence for Acquisitions**
Very good manual, very good examples used and also solicited from class, good case study that followed through all course.
- Good reference material and good general information.

**Employment Law A – Z**
The material is great - it’s information I really need and the rules are fairly straightforward. It gives you a good overview of where to engage expertise.

**Estate and Probate Planning - Using Trusts Tax-Efficiently**
Great summary and update, very useful.
- Great use of practical examples and what is used and works in his practice.

**Everyday Income Tax Issues for the General Practitioner**
Appeal, the content of the course. Topics covered were very informative. Instructor did a very good job & knew the material.
- Like to attend this every few years to ensure I’ve not missed anything new. I also like the ability to hear other practitioners experiences.

**Excel Advanced**
I liked that there were many examples of how to use the functions within Excel and how the uses might be relevant for an accountant.
- First Excel course that I felt I could keep up/follow most of the instructor examples on my computer.
- Useful tools that will be able to be applied to everyday use of Excel.

**Fraud Happens! What to Do When You Suspect Fraud**
Excellent refresher and reminder of all the different ways that fraud can occur.
- Many great tips for handling fraud as well.
- I think it is a very broad topic but the course focused on key issues and made you aware of appropriate actions and options relating to Fraud.
- Very practical approach with an engaging and charismatic teacher. I would definitely take more classes from Hugh. He had practical examples and kept my attention throughout the entire session. Very impressed.

**GST/HST & Real Property**
Covered key issues of GST/HST and real property. Will be a good reference going forward.
- The course material described transactions that we deal with in public practice.

**Retirement Planning**
Application of solid examples from real life. Broad-based enough to appeal to a wide audience. Everyone should come away with something.
- Presenter was very good with the right experience.
- Practical advice for retirement planning.
Course Fees

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

<table>
<thead>
<tr>
<th>TYPE / LENGTH</th>
<th>MEMBER FEE</th>
<th>NON-MEMBER FEE</th>
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<tbody>
<tr>
<td>½ Day</td>
<td>$180</td>
<td>$220</td>
</tr>
<tr>
<td>1 Day</td>
<td>$320</td>
<td>$380</td>
</tr>
<tr>
<td>2 Day</td>
<td>$585</td>
<td>$760</td>
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Price Reductions

Effective May 1, 2010, 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 at droode@icans.ns.ca or (902) 425-3291 Ext. 31.

Passports

PD Passports were developed to offer members and other professionals interested in taking multiple Passport 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 day passport valid sessions, but could also receive a saving of 28% if only registering for three days of PD in one year. Organization Passports work potentially on the same basis, the more sessions taken, the bigger the savings, but this passport has the versatility of multiple users from the same company or firm (see Registration Information & Conditions). PD Passports are valid from 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:

<table>
<thead>
<tr>
<th>PASSPORT TYPE</th>
<th>DAYS</th>
<th>PD PASSPORT FEES</th>
<th>ADDITIONAL PER COURSE FEE</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>MEMBER</td>
<td>NON-MEMBER</td>
</tr>
<tr>
<td></td>
<td></td>
<td>FULL</td>
<td>HALF</td>
</tr>
<tr>
<td>Individual</td>
<td>5 full/10 half</td>
<td>$690</td>
<td>$860</td>
</tr>
<tr>
<td>Organization</td>
<td>9 full/18 half</td>
<td>$2300</td>
<td>$2650</td>
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</table>

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

General (All Registrations)

CANCELLATION OF SEMINARS BY ICANS
1. The Institute reserves the right to cancel seminars for low registration. Courses with insufficient enrolment two weeks prior to course date will be cancelled. Registrants will be advised and may enroll in alternative courses (subject to availability) or receive a full refund/course credit.

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

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

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

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

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

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

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

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

TIMES
Please refer to course descriptions for course times. Check course outlines on ICANS’ website (www.icans.ns.ca under Professional Development tab CPD Opportunities) for the most recent changes.

CONFIRMATIONS
Confirmation reports for course registrations are mailed approximately two weeks prior to the course date. For registrations received after this date, confirmation will be faxed or emailed. If you have not received a confirmation prior to the seminar date, please contact the 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 Spring PD courses will take place in the ICANS Learning Centre, Halifax (address will be confirmed on course confirmation). Seminar locations and dates are subject to change. Please see individual course descriptions in this brochure for locations of each course and check on-line for updated information.

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 COURSE FEES SHOULD BE MAILED TO
The Institute of Chartered Accountants of Nova Scotia (ICANS)
5151 George Street, Suite 502
Halifax, NS B3J 1M5
Tel: (902) 425-3291

OR FAX (CREDIT CARD REGISTRATIONS 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
REGISTRATION INFORMATION & CONDITIONS

Non-Passport

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

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

PASSPORT

REGISTRATION
Deadline for the purchase of PASSPORTS is May 4, 2015. 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 Pricing Information) of $200 plus HST per full-day (not available for non-members) and $105 plus HST per half-day course (not available for non-members).

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

PASSPORT REGISTRATIONS

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

To register, complete and return the registration form together with a cheque or credit card information for the course (plus late filing fee if applicable) to The Institute of Chartered Accountants of Nova Scotia (ICANS). This should reach 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.)

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

CONDITIONS
Individual PD Passport
• Member pricing of $690 plus HST for CAs, CMAs and CGAs and $860 plus HST for non-members (see Pricing Information).

• 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
• Member pricing of $2,300 plus HST for CAs, CMAs and CGAs and $2,650 plus HST to include non-members (see Pricing Information).

• Organization participants may attend the equivalent of 9 full-day passport valid courses.

• Non-member Organization Passports entitle an organization to register those eligible for member pricing and non-members for up to 9 full-days, additional offerings can be added to this passport for CAs, CMAs and CGAs only, at the reduced fees. If more than 9 days are required for non-members, either an additional passport must be purchased or payment of full registration fees for the additional non-member registrations will apply.

• An organization can register any number of individuals eligible for member pricing for any given passport valid course(s), but they must be employees of that organization. All persons included on an Organization Passport must be registered by the passport deadline date; no additional participants can be added to an Organization Passport after the deadline date.

• 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.
ACCOUNTING

Accounting, Auditing and Professional Practice Update
PD15160011 | Reoffering
Level: Intermediate

This course is designed to review recent revisions to the CPA Canada Handbook, specifically Accounting - Part II (ASPE), Part III (Accounting Standards for Not-for-Profits), and Assurance, as well as other sources. It also includes an outline of the changes in IFRSs, as these revisions often precede similar revisions to ASPE and form one source of additional guidance in the application of ASPE. This course is designed as an update, yet it provides specific examples of the implementation of the new recommendations and practice guidance on other matters that are current and relevant to the participants.

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

At the end of the course participants will be:
• Aware of recent CPA Canada pronouncements and guidance in accounting and assurance
• Able to identify the potential impact on clients and their practice of the recent CPA Canada pronouncements and guidance
• Able to apply recent CPA Canada pronouncements in some situations

TOPICS INCLUDE
• Introduction and overview of new standards
• Review of all changes to CPA Canada Handbook – Accounting and Assurance
• Review of matters discussed by the Private Enterprise Advisory Committee
• Illustration of problem areas in the application of ASPE and Accounting Standards for Not-for-Profit Organizations, based on practice inspection and other sources
• Other practice matters including a review of practice inspection findings
• Exposure drafts and other projects in process for accounting and assurance, including an update on the status of the projects on review engagements and compilation engagements

NOTE
Those interested in an in-depth review of the changes to Part I (IFRS) of the CPA Canada Handbook should consider attending the IFRS - Update 2014 (see page 21) course and those interested in a more in-depth review of Part III (NFPOs) should consider attending the full day course: Not-for-Profit Organizations – A Survey of Standards Under Part III of the Handbook (see page 21).

SEMINAR LEADER/S (see Instructor Bios)
Susan McIsaac, FCA

May 7, 2015, 9am - 5pm
ICANS Learning Centre
1 Passport Day | 7 PD Hours

ASPE: Disclosure & Presentation - From Standards to Words
PD15160021 | Reoffering
Level: Intermediate

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

This seminar reviews disclosure and presentation requirements of ASPE, from cash to cash flow; from financial instruments to equity instruments; and from the known to the contingent. The seminar will start with a basic private enterprise financial statement, showing the common presentation and disclosure requirements and will then build on those statements with additional disclosure and presentation matters. Each disclosure and presentation requirement of ASPE will be reviewed and examples will be provided (sample financial statements are developed during the seminar). The seminar will be delivered primarily through discussion of examples with some exercises. Participants are welcome to bring financial statements used in their own environment.

SEMINAR OUTLINE
• Disclosure requirements provided in Part II of the Handbook – Accounting
• Applying professional judgement in developing sufficient disclosure
• Identifying options and choices in presentation
• Presentation and disclosure requirements in Sections 1000 through Section 3870 and the Six Guidelines in Part II of the Handbook – Accounting

WHO WILL BENEFIT
Practitioners and preparers of financial statements for private enterprises.

PREREQUISITE
Good working knowledge of ASPE.

SEMINAR LEADER/S (see Instructor Bios)
Susan McIsaac, FCA

May 8, 2015, 9am - 5pm
ICANS Learning Centre
1 Passport Day | 7 PD Hours
Compilation Engagements  
PD15160031 | Reoffering  
Level: Introductory to Intermediate

**OBJECTIVE**  
The objective of this seminar is to look at the professional requirements as outlined in the *CPA Handbook* and the *Rules of Professional Conduct*, and how to apply these standards in practice on a consistent basis for a compilation engagement.

**WHO SHOULD ATTEND**  
New and experienced practitioners and their staff who would like an overview of the practical issues of compilation engagements.

**BENEFITS OF ATTENDING**  
Some of the questions covered will include  
• professional judgement issues as to what should be in working paper files?  
• how do the “association rules” impact these engagements?  
• does the practitioner have to be independent?  
• what about monthly bookkeeping assignments?  
• what about information gathered for tax compliance purposes?

**CONTENT**  
• standards set out in *CPA Handbook* and the *Rules of Professional Conduct*  
• miscellaneous topics relating specifically to compilation engagements  
  • who can do compilation engagements  
  • what communication issues are relevant  
  • how does lack of independence impact these engagements  
  • how do the association rules impact these engagements  
  • how do the standards impact bookkeeping practices  
  • how do the standards impact tax compliance work performed  
  • discussion of what should be included in the working paper file  
  • how much work is too little, or too much, to have in our files  
  • the use of an index, engagement letters, compilation and independence checklists, and file review procedures  
  • sample compilation file to provide a practical example  
  • appendix - compilation and independence checklists; and other relevant materials of interest to practitioners

**PREREQUISITE**  
Review the Handbook sections 9200 and AuG-5.

**SEMINAR LEADER/S** *(see Instructor Bios)*  
David Strong, CA

June 26, 2015, 9am - 12pm  
ICANS Learning Centre  
½ Passport Day | 3 PD Hours

Effective Use of Analytical Procedures  
PD15160041 | Reoffering  
Level: Intermediate

The course prepares participants to use analysis under CAS requirements both as a risk assessment procedure and as a substantive procedure when responding to assessed risks. It equally prepares the participant to use analysis as a procedure in establishing plausibility when performing review engagements under Sections 8100 to 8600 of the *CPA Canada Handbook*-Assurance.

This course exposes participants to the various available analytical procedures and the different application techniques that can be used to maximize the effectiveness and efficiency of audit and review engagements while continuing to meet professional requirements.

**WHO WILL BENEFIT**  
The course is designed for supervisors and partners in small or medium-sized firms performing audit or review engagements for small to medium-sized businesses.

**LEARNING OUTCOMES**  
Participants will gain an awareness of the CPA Canada pronouncements in respect of analytical procedures, and understand how to develop possible analytical procedures effectively and efficiently on a client-by-client basis.

**TOPICS INCLUDE**  
• Requirements of the *CPA Canada Handbook* – Assurance and other relevant sources of information related to analytical procedures  
• The different objectives and requirements of using analytical procedures as a Risk Assessment Procedure (*CAS 315*) and as a substantive procedure (*CAS 330&CAS 520*)  
• Various types of analytical procedures  
• Sources of business information and establishing reliability of data  
• Benefits and concerns of using analytical procedures  
• Methodology in applying analytical procedures  
• Strategies in using analysis on its own or combined with other substantive procedures as a means of responding to identified risk in an audit under CAS  
• Documentation examples of required preliminary and final analytics and of a response to identified risk.  
• Using analysis in a review engagement along with inquiry and discussion to establish plausibility  
• Hands-on application through the use of practical examples and cases

**SEMINAR LEADER/S** *(see Instructor Bios)*  
Veronica Hunt, CA

June 26, 2015, 1pm - 4pm  
ICANS Learning Centre  
½ Passport Day | 3 PD Hours
Fraud Happens! What to Do When You Suspect Fraud

PD15160051 | Reoffering
Level: Intermediate

You don’t encounter fraud every day. This course, taught by an experienced fraud investigator, provides you with the basic skills you need to react to allegations of fraud in an efficient and effective way.

WHO WILL BENEFIT
Members in industry or public practice who wish to better understand the fraud investigation process, recovery techniques, and how to manage an internal fraud investigation while avoiding common pitfalls.

LEARNING OUTCOMES
You won’t be a fully-trained fraud investigator at the end of the day, but you will know enough to avoid panic and calmly work through the situation. The course provides a framework in which to manage the investigation of fraud allegations, including the use of investigative tools, sources of recovery, and related aspects (such as dealing with the media and the police).

TOPICS INCLUDE
• Introduction to fraud – An overview of fraud (definition/extent/ fraud triangles); the tools organizations use to address fraud (fraud policy, code of conduct, etc.); an overview of recent Fraud Surveys, preparing an organization to address fraud allegations; and common perils and pitfalls. The course also briefly addresses CPA Canada standards for IFA engagements
• Real life fraud cases – A review of recent frauds, including how the perpetrator benefited from the fraud, how they were caught, and what they did. The focus is on smaller or medium-sized frauds and organizations
• Fraud indicators – An overview of the indicators of fraud, tied to the fraud cases presented in the previous section
• Planning an investigation – Initial investigative steps in planning an investigation. (Case Study – part 1)
• Investigative research – An overview of publicly available information and how that information can be obtained, as well as internal sources of information
• Computerized information – An overview of preserving, analyzing and presenting electronic evidence (Case Study – part 2)
• Legal tools and remedies – An introduction to basic legal tools used by fraud investigators and counsel (such as Mareva Injunctions and Anton Piller Orders) and when they are appropriate
• Developing the investigative plan – Apply the above information to the case study (Case Study – part 3)
• Debriefing the “Actual” Case – Review what actually happened in resolving the fraud allegations
• Instructor/participant experience – Discussion of the instructor’s unique experience, as well as a chance for participants to present situations they have encountered

SEMINAR LEADER/S (see Instructor Bios)
Hugh Avery, CA-IFA, CAMS

June 15, 2015, 9am - 5pm
ICANS Learning Centre
1 Passport Day | 7 PD Hours
**Breaking Up is Hard to Do**

**PD15160161 | Reoffering**  
**Level: Intermediate**

**OBJECTIVE**  
When your business client’s marriage or common law relationship breaks down, you are often asked to assist during the negotiation and/or litigation process as you are familiar with the client’s finances and planning. Learn how the Matrimonial Property Act classifies matrimonial property and business assets, as well as the laws that apply to many common law couples.

**WHO SHOULD ATTEND**  
This seminar is for you if you have clients with business interests or family property including trusts.

**BENEFITS OF ATTENDING**  
You will gain an understanding of family law and will learn the important role you can play in creatively dividing business interests and other assets particularly from a tax and valuation perspective. Find out what information lawyers really need and how you can assist and advise your clients so they can be well positioned before a family breakdown occurs.

**CONTENT**  
- what is matrimonial property and matrimonial debt and how are these divided?
- what property and debt is excluded from a division of assets?
- how are business assets treated?
- what do you do when there is property and debt in other jurisdictions?
- how do the courts view entitlement to child and spousal support and quantum?
- learn common and complicated tax tips and traps in dividing property and debt
- accountants can play a big role in valuing family property and debt
- learn how the law treats cohabitation and prenuptial agreements
- learn some planning techniques for your clients to consider in advance of a marital breakdown

**SEMINAR LEADER/S (see Instructor Bios)**  
Dan Jennings, CA, CBV, CF
Christine Doucet, LLB

June 18, 2015, 1pm -4:30pm  
ICANS Learning Centre  
½ Passport Day | 3 PD Hours

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**Business Valuations - Introduction**

**PD15160061 | Reoffering**  
**Level: Introductory**

This full day seminar provides participants a practical insight into business valuation. Participants will learn about and apply valuations tools such as multiples and discounted cash flow to business case studies. The seminar also focuses on business valuation interpretation as well as the mechanics of the valuation process.

**After this seminar, participants will be able to:**  
- Understand the various approaches used in business valuation
- Explain how to apply these valuation approaches to real business
- Value a simple company using asset-based valuation methods
- Explain how to value a business using Capitalized Cash Flow (CCF) and Discounted Cash Flow (DCF) valuation approaches
- Value a business using market comparables

**SEMINAR OUTLINE**  
- Overview of valuation methodologies
- Asset based valuation methods
- CCF and DCF valuation techniques
- Calculating maintainable earnings
- Determining capitalization and discount rates
- Enterprise value versus equity value
- Market valuation approaches using equity value and enterprise value multiples

**WHO WILL BENEFIT**  
Those in industry and practitioners with limited to no valuation experience who are seeking a better understanding of business valuation principles and practices.

**SEMINAR LEADER/S (see Instructor Bios)**  
Craig Maloney, MBA, CA, CBV

May 12, 2015, 9am - 5pm  
ICANS Learning Centre  
1 Passport Day | 7 PD Hours

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For Course Fees, see Pricing Information.
Corporate Treasury Management
PD15160071 | Reoffering
Level: Intermediate

The treasury function has evolved from cash management and insurance to funding strategy, complex risk management techniques and oversight over many aspects of corporate risk management and loss reduction. This course provides the participants with the tools necessary to add value to the treasury function in their organization.

WHO WILL BENEFIT
This course will benefit corporate finance and treasury professionals, internal and external auditors, consultants, accountants, controllers and CFOs. The course will be of interest to those looking for an introduction to treasury, as well as practitioners. It provides interesting insights for large organizations with separate treasury departments, as well as for smaller companies where the treasury functions are carried out by finance and accounting staff. Consultants and auditors will also find this course useful in understanding some of the principles surrounding treasury activity and its internal controls and risk management.

LEARNING OUTCOMES
Participants will be able to understand the roles of a modern treasury function/department, including:
• Deepen understanding of risk management, including enterprise risk management, financial risk management, and value-at-risk
• Understand how current developments in financial markets affect treasury operations
• Understand cash management and cash flows
• Analyze capital structure and cost of capital
• Understand derivatives and when to use them
• Improve treasury internal controls and control systems
• Key issues in dealing with bankers

TOPICS INCLUDE
• Treasury overview
• Cash management
• Funding
• Financial instruments and derivatives
• Treasury oversight and control
• Risk management
• Dealing with bankers and lenders
• Tips and traps

SEMINAR LEADER/S (see Instructor Bios)
Scott Weatherby, CA

Due Diligence for Acquisitions
PD15160081 | Reoffering
Level: Intermediate

Due Diligence for Acquisitions focuses on the core part of an M&A project: how to plan, evaluate, analyze and then synthesize the information accumulated. The due diligence process has multiple objectives: providing a basis for pricing the transaction, deciding whether to proceed, and preparing for life after the acquisition is consummated. Participants will be able to deepen their understanding of mergers and acquisitions, understand strategic elements, and know what to look for when undertaking due diligence reviews.

WHO WILL BENEFIT
Accountants, managers and executives who have experience in mergers and acquisitions and would like some fresh perspectives, as well as those undertaking due diligence for the first time. The course also benefits those on the receiving end of a due diligence review.

LEARNING OUTCOMES
Participants will improve their ability to:
• Understand the strategic objectives of a due diligence review
• Plan an acquisition
• Develop valuation and pricing recommendations
• Understand critical issues in confidentiality agreements
• Identify key issues in a prospective acquisition

TOPICS INCLUDE
• Overview of the due diligence process
• Planning the acquisition
• Planning the due diligence review
• Information and confidentiality
• Financial review
• Human resources review
• Legal review
• Operational review
• Purchase price and valuation
• Reporting
• Tips and traps

SEMINAR LEADER/S (see Instructor Bios)
Scott Weatherby, CA

May 13, 2015, 9am - 5pm
ICANS Learning Centre
1 Passport Day | 7 PD Hours
FINANCE

Financing Strategies
PD15160091  |  Reoffering
Level: Intermediate

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

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

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

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

CONTENT
• overview of financing strategy and capital markets
• current state of the capital markets
• basic capital structure elements
• 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 and negotiating strategies

SEMINAR LEADER/S (see Instructor Bios)
Blair Cook, CA, CPA (IL), MBA

Principles & Practices of Business Acquisitions
PD15160101  |  Reoffering
Level: Intermediate

Many businesses use acquisitions as part of their growth strategy. This seminar focuses on the major considerations involved in assessing a possible target, making a deal, financing the transaction and operating the merged entity. The seminar is intended to provide a basic understanding of all of the considerations with an emphasis on those areas where an accounting professional is likely to be most involved in an acquisition. Participants will learn how the pieces of an acquisition fit into an integrated whole to generate value on behalf of an employer’s shareholders.

SEMINAR OUTLINE
• The acquisition business
• Selecting a target
• Overview of the acquisition process
• The due diligence investigation
• Forecasting the performance of the acquisition
• Valuing the target
• Financing your acquisition
• Integration: making the acquisition work
• Overview of some tax considerations
• Overview of some legal considerations
• Maximizing your probability of success
• Case study

WHO WILL BENEFIT
Members in industry who are involved in their company’s acquisition programs and practitioners who may be asked to advise clients in this area.

SEMINAR LEADER/S (see Instructor Bios)
Kelly Nelson, FCA

May 14, 2015, 9am - 5pm
ICANS Learning Centre
1 Passport Day  |  7 PD Hours

June 22, 2015, 9am - 5pm
ICANS Learning Centre
1 Passport Day  |  7 PD Hours

For Course Fees, see Pricing Information.
**Excel Advanced**

**PD15160111 | Reoffering**

**Level: Advanced**

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

**LEARNING OBJECTIVES**

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

**COURSE INFORMATION**

**Instructional delivery method:** Group-live demo and discussion using color computer projection – this course is “laptop friendly,” so feel free to bring your laptop equipped with Excel 2007 or higher.

**PREREQUISITES**

Experienced Excel user

**DESIGNED FOR**

Accountants who work with Excel and who want to learn all of the best features and functions.

**WHO SHOULD ATTEND**


**SEMINAR LEADER/S** (see Instructor Bios)

Ward Blatch, CA, MCSA

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**Paperless Office**

**PD15160121 | New**

**Level: Intermediate**

Would you like to find important documents in 10 seconds or less? Of course you would! At the very least, you would like to have secure, reliable access to information more rapidly than you have today while reducing storage space requirements and costs. No one expects a completely “paperless” office, but everyone would like to have much “less paper” to manage! This course will use best practice methods and demonstrate proven processes for document management.

The instructor will guide you through the file organization and retention process from simple, inexpensive systems costing a few hundred dollars to comprehensive options complete with workflow. Example topics include how to integrate digitized hard copy files with documents that already exist in your system, such as Word, Excel, and Outlook e-mail files and how to manage long-term electronic file systems. There will be discussion on exporting and importing data from specialized applications such as tax or accounting software into a total document management solution. Considerations for implementing paperless audits will be included. You will leave this seminar with a comprehensive understanding of your options and a clear direction of how to implement your own version of the Paperless Office.

**LEARNING OBJECTIVES**

- Define key paperless office terms such as Document Management, Records Management, and Business Process Management; calculate the ROI of Paperless; and identify the Steps to Prepare for Paperless.
- Describe the need for Records Retention Guidelines and define a Records Retention Policy.
- List and describe the three components of a paperless office – infrastructure, workflow, and people.
- Identify key characteristics of Electronic File Cabinet solutions and Document Management solutions and typical costs associated with these systems; recognize key vendors of these solutions and the products and services they offer.
- Identify key hardware requirements for moving to paperless, including Scanners, Computers, Storage, Memory, Operating Systems, and Network Considerations.
- Describe key data backup, disaster recovery, and business continuity issues and identify key vendors in this area and the solutions they offer.
- Define Paperless Audit and describe the key Hardware, Software, and Workflow tools needed to execute a paperless audit; identify key vendors and solutions for paperless audits.

**COURSE INFORMATION**

**Instructional delivery method:** Group-live demo and discussion using color computer projection – NOT a hands-on course.

**PREREQUISITES**

Fundamental knowledge of computer operations.

**WHO SHOULD ATTEND**

Accountants and other business professionals who are accountable for information CFO, Controller, CEO, CIO, and senior managers in general.

**SEMINAR LEADER/S** (see Instructor Bios)

Ward Blatch, CA, MCSA

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June 8, 2015, 9am - 5pm

ICANS Learning Centre

1 Passport Day  |  7 PD Hours

June 9, 2015, 9am - 5pm

ICANS Learning Centre

1 Passport Day  |  7 PD Hours
iPad - An Effective Business Tool
PD15160131  |  Reoffering
Level: Introductory
Moving beyond the hype, Apple’s iPad has all the potential to serve as a serious business tool. Not only can you use the iPad to access traditional resources, such as your corporate network and email, but you can also use it to create, communicate, and collaborate in ways that you may not have considered possible. In this fast-paced, four-hour seminar, you will learn how to put the iPad to work, exploring key business issues such as security, connecting to the Cloud, and how to work with common file formats, including PDF documents, Excel spreadsheets, and Word documents. Whether you already own an iPad or are considering acquiring one, you need this course to ensure that you maximize the return on your investment.

LEARNING OBJECTIVES
• Describe how to configure an iPad for business use, including securing access and connecting to VPNs and corporate email accounts
• List five primary business uses of the iPad and examples of available apps that support each of these uses
• Create spreadsheets, word processing documents, presentations, and other common documents using an iPad
• Use an iPad in an accounting environment
• Connect an iPad to a data projector and use it as a second monitor on another computer
• Integrate the iPad with various cloud services, including Apple’s iCloud service

COURSE INFORMATION
Instructional delivery method: Group–live demo and discussion using color computer projection – NOT a hands-on course.

DESIGNED FOR
iPad users and potential iPad users who desire to put their tablet to its best use in a business environment

WHO SHOULD ATTEND
Accounting, financial, and other business professionals who own or are considering acquiring an iPad

SEMINAR LEADER/S (see Instructor Bios)
Ward Blatch, CA, MCSA

June 10, 2015, 9am - 12pm
ICANS Learning Centre
½ Passport Day  |  3 PD Hours

Technology for Accountants -
Don't Get Left Behind
PD15160141  |  Reoffering
Level: Intermediate
Are you ready to learn about the latest trends in technology? Do you sometimes feel lost in the technology jungle? Would you like clear guidance regarding Windows, Office, the cloud, security, and other technology-related issues? If you answered “yes” to any of these questions, then make plans now to invest 3 hours in this fast-paced and highly informative seminar that is sure to ramp up your return on technology investment.

The technology tools available to all have never been better, but many are not taking full advantage of these tools. This course helps professionals at all levels understand the major trends in hardware, software, and services and how to utilize these tools to meet organizational objectives both efficiently and effectively. More than just a seminar on the latest computers, you will learn about the full spectrum of practical technology available to you and your team and how to implement these tools for maximum impact.

LEARNING OBJECTIVES
Upon completing this course, participants should be able to:
• List and describe key features of Windows 8 and identify situations where upgrading to this operating system might be advantageous
• Analyze developments in mobile technologies and develop an optimal strategy for going mobile
• Discuss security issues facing accounting and financial professionals and list options for mitigating risk
• List and describe key features of Office 2013 and determine optimal time to upgrade
• Describe trends in hardware, including desktops, laptops, servers, tablets, storage, and printing
• Discuss strategies for successful cloud implementations, including accounting and tax, document management, workflow, and data storage and synchronization applications
• Describe the topic of virtualization and how it potentially changes the technology infrastructure in your office

COURSE INFORMATION
Instructional delivery method: Group–live demo and discussion using color computer projection – NOT a hands-on course

PREREQUISITES
Fundamental understanding of basic technology concepts

WHO SHOULD ATTEND
Accounting and financial professionals who are interested in how technology affects them

SEMINAR LEADER/S (see Instructor Bios)
Ward Blatch, CA, MCSA

June 10, 2015, 1pm - 4pm
ICANS Learning Centre
½ Passport Day  |  3 PD Hours

For Course Fees, see Pricing Information.
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 $295/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

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 442-6965 or email Mary Bobyk-Lewis, maryb@traincanada.com.
Alternate Dispute Resolution in Business  
**PD15160151 | Reoffering**

This course will introduce Alternate Dispute Resolution (ADR) processes, which include negotiation, mediation, arbitration and med-arb. There will be an emphasis on negotiation, a practical and necessary skill for anyone in business.

**WHO SHOULD ATTEND?**
This course is for anyone who may ever have to negotiate or deal with disputes, whether those disputes are their own, such as disputes with clients over services, or with others. This course is also for anyone who may ever have to give advice and direction to clients who have any manner of disputes ranging from internal disputes (like shareholder disputes or succession planning matters) to and including disputes with others, such as in breach of contract cases.

ADR is growing in importance because traditional litigation is becoming so expensive and takes so long that for many clients, including many small to medium sized businesses, litigation is not affordable. Yet disputes have to be resolved. In many cases ADR processes make the most sense.

**TOPICS INCLUDED**
1. What is ADR?
2. ADR Processes available:
   - Negotiation
   - Assisted or Interest-based Mediation
   - Med/Arb
   - Arbitration
   - *Arbitration Act and Commercial Arbitration Act*
   - Exercises
3. Advantages of ADR over Litigation
   - Cost
   - Confidential (Private)
   - Efficiency (Speed)
   - Conflict Centered
4. Negotiation
   - Alternatives (BATNA)
   - Interests
   - Options
   - Legitimacy
   - Communication
   - Relationship – Separate the Person from the Problem
   - Commitment
5. Rethinking Standard ADR Provisions in Legal Agreements
   - Some History
   - Advantages to Modernization
   - Precedents

**SEMINAR LEADER/S (see Instructor Bios)**
Jim Musgrave, Q.C., C.Med.
Ron Pizzo, LLB

June 16, 2015, 9am - 12pm
ICANS Learning Centre
½ Passport Day | 3 PD Hours

Dealing with Difficult People  
**PD15160171 | Reoffering**

What makes it possible to deal with difficult people at all is that, like everybody else, they have positive responses in their repertoire. You can learn to avoid doing and saying those things that elicit the negative behaviour from a difficult person. And structure the interaction so as to encourage his or her positive, more productive responses. You will then be able to cope more successfully with difficult people.

Of course, we can all be difficult people ourselves in certain situations. So it is important to focus on the difficult behaviour and the situation in which that behaviour is occurring. After this course you will see difficult people as an interesting challenge which you can handle more skilfully.

**PROGRAM CONTENT**
- How to recognize underlying causes of conflict
- How to handle the triggers which get you upset
- How to listen and empathize so that you stay in control
- How to ask the questions which will uncover possible solutions
- How to identify shared interests and differing interests
- How to problem solve using time tested strategies
- How self-control leads to self-respect and respect from others

**PROGRAM BENEFITS**
This course will help you:
- Improve your emotional intelligence skills
- Get some distance between you and the difficult behaviour
- Use a step by step process to cope with a difficult person
- Step out of the Cycle of Conflict
- Develop the negotiation skills that work best for you

**WHO WILL BENEFIT**
Anyone who interacts with a variety of people in different situations, and who wants to further enhance their interpersonal effectiveness.

**SEMINAR LEADER/S (see Instructor Bios)**
Eileen Pease, BA, B.Ed., M.Ed., CHRP

June 29, 2015, 9am - 5pm
ICANS Learning Centre
1 Passport Day | 7 PD Hours
PROFESSIONAL & PERSONAL SKILLS

Employment Law A-Z
PD15160181 | Reoffering

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

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

WHO WILL BENEFIT?
Accountants who have responsibility for human resource matters will particularly benefit from this session

SEMINAR LEADER/S (see Instructor Bios)
Peter McLellan, QC

June 11, 2015, 1pm - 4pm
ICANS Learning Centre
½ Passport Day | 3 PD Hours

Get More Power from Your Brain
PD15160191 | Reoffering

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

These unrecognized habits literally weaken our brain power.

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

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

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

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

SEMINAR LEADER/S (see Instructor Bios)
Eileen Pease, BA, B.Ed., M.Ed., CHRP

June 30, 2015, 9am - 5pm
ICANS Learning Centre
1 Passport Day | 7 PD Hours
**Practical Project Management**  
**PD15160221 | Reoffering**  
**Level: Introductory**

Have you ever found yourself filling the role of a Project Manager, even though you aren’t one? We like to call it the “accidental project manager”. Today, in addition to the regular duties of your job, you are often expected to take on extra assignments - and to get that additional job done well, done under budget and done on time.

Course topics will familiarize you with the most common terms, practical implementation and the most current thinking about projects; including tips and tricks learned in industry by Project Managers.

**At the end of this workshop, you will be able to:**
- Understand what is meant by a project
- Understand what project management means
- Understand the role of a Project Manager
- Identify the phases of a project’s life cycle
- Create a Scope Statement and Project Charter
- Develop and manage change control
- Order tasks using the Work Breakdown Structure
- Communicate effectively with stakeholders and team members
- Use basic planning tools such as a Gantt chart & Excel
- Prepare a project budget
- Identify and manage risks
- Prepare a final project plan
- Execute a project
- Close-out a project

**WHO SHOULD ATTEND**

This workshop provides information needed to successfully participate in or lead projects of any scale. Whether you are an accidental project manager, a team member or a project manager, you will benefit from the practical approach of this workshop.

**SEMINAR LEADER/S (see Instructor Bios)**
Lorrie Slade, P.Eng

May 6, 2015, 9am - 5pm  
ICANS Learning Centre  
1 Passport Day | 7 PD Hours

**Retirement Planning**  
**PD15160231 | Reoffering**  
**Level: Introductory**

**OBJECTIVE**

This seminar will provide a comprehensive overview of what things should be considered in preparing and implementing a realistic retirement plan to meet retirement goals.

**WHO SHOULD ATTEND**

Early to mid - career professionals who are interested in ensuring they have an adequate retirement plan for themselves and/or who are involved in advising clients on retirement related matters.

**BENEFITS OF ATTENDING**

At the end of this seminar, you will know what steps are involved in preparing a retirement plan; will have performed some diagnostics on your own situations to determine if your retirement trajectory is on track; and will have gained some useful intermediate level knowledge on implementing an effective retirement plan.

**CONTENTS**
- The Retirement Horizon
- Demographics
- 100 Year Life
- Impact of the “Lost Decade”
- The Retirement Planning Process
- Why do a Plan?
- Objectives of a retirement plan
- Six Facets of Retirement Planning
- Case Study Exercise
- Sample retirement plan
- Diagnostic exercise: are you ready?
- Implementing a Retirement Plan: Important Things to Think About
- Retirement planning for the self-employed/small business owner
- Retiring allowances and severances
- Pension income splitting
- Layering your retirement income to optimize retirement income
- Limbo bar on net income
- Risk management strategies before and during retirement years
- The “retirement risk zone” and what to do about it.

**SEMINAR LEADER/S (see Instructor Bios)**
Doreen Malone, CA, CFP

June 16, 2015, 1pm - 4pm  
ICANS Learning Centre  
½ Passport Day | 3 PD Hours
Strategic Relationship Skills for Influence
PD15160241 | Reoffering

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

Whether you are an introvert or extrovert, shy or gregarious, strategic relationship skills for influence can help improve your business rapport with clients, team members, bosses, and direct reports, creating strong relationships to support the achievement of your goals.

During this seminar, we will explore a variety of strategic relationship skills for influence, including strategies for awkward situations. This workshop provides practical application using case studies and examples as well as personal reflection, to help you identify strategies that complement your personal style, allowing you to build stronger relationships across your personal and professional networks.

KEY LEARNING OUTCOMES
• Tools to build your adaptable relationship style by first understanding your role, style and preferences and how these influence your interpersonal interactions.
• Practical approaches to interaction opportunities, including how to quickly assess the preferences and needs of others, and how to adapt your approach to build rapport more quickly and, as a result, build stronger relationships to create more influence.
• Effective networking strategies, for both introverts and extraverts.
• Practical strategies to move a relationship from acquaintance to trusting.
• Practical tools for dealing with difficult and/or awkward situations while still preserving the underlying relationship and understanding how to push through a challenge with the relationship intact.

SEMINAR LEADER/S (see Instructor Bios)
Maureen Gillis, CA

June 23, 2015, 9am - 4pm
ICANS Learning Centre
1 Passport Day  |  6 PD Hours

Who You Are is How You Lead: Unleashing Leadership Excellence
PD15160231 | New

This course focuses on increasing people’s self-awareness so they make better choices, have better skills to deal with challenges in front of them, which in turn increases self-confidence, engagement and makes them better leaders.

A person’s effectiveness is directly related to the accuracy of their self-perception in the world. In other words, building on your knowledge and level of self-accuracy is key. Most of us are aware of how we could be more effective but we may continue to repeat patterns of behavior that are not supporting our overall success and contentment.

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

According to renowned executive coach Kevin Cashman (2008), author of Leadership from the Inside Out, it is incumbent that leaders “develop their internal capabilities to make a more positive contribution” (p.23). Cashman (2008) seeks to help executives master ways to lead more successfully by fostering the growth of the whole person as a leader. His list of important character traits includes: openness, trust, balanced concern for self and others, courage, and being a calming presence to name a few. His rationale for successfully helping leaders is based on thousands of conversations with CEOs, key thought leaders and scholars in the fields of psychology, adult development and leadership development.

Like Cashman, working as an executive coach I witness the challenges leaders face in not having enough time for their own development with the goal of building inner capacity and efficacy.

PURPOSE
To Increase Your Leadership Effectiveness

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

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

WHO SHOULD ATTEND
Executives, managers, supervisors, human resource professionals and anyone interested in moving to their next level of leadership.

SEMINAR LEADER/S (see Instructor Bios)
Mara Vizzutti, B.Ed., ACC

May 11 2015, 9am - 5pm
ICANS Learning Centre
1 Passport Day  |  7 PD Hours
Catching Up: 5 Years of Income Tax Developments
PD15160251 | Reoffering
Level: Intermediate

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

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

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

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

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

SEMINAR LEADER/S (see Instructor Bios)
David Cameron, CA

June 19, 2015, 9am - 5pm
ICANS Learning Centre
1 Passport Day | 7 PD Hours

Estate and Probate Planning – Using Trusts Tax-Efficiently
PD15160261 | Reoffering
Level: Intermediate

Trusts are an extremely flexible tool for estate planning. In particular, trusts can be used for tax-efficient probate planning.

In this session we will review the following topics:
• What is a trust?
• Taxation of trusts
• Review and assessment of various types of trusts including inter vivos trusts, family trusts, alter ego and joint partner trusts, spousal trusts, testamentary trusts, insurance trusts, and RRSP/RRIF trusts
• What is probate?
• Why avoid probate?
• Strategies to avoid probate, including gifts, joint ownership, beneficiary designations and various types of trusts including bare trusts

SEMINAR LEADER/S (see Instructor Bios)
Richard Niedermayer, LLB, TEP

June 24, 2015, 9am - 12pm
ICANS Learning Centre
½ Passport Day | 3 PD Hours

For Course Fees, see Pricing Information.
Everyday Income Tax Issues for the General Practitioner
PD15160271 | Reoffering
Level: Intermediate

This full-day seminar deals with income tax issues that general practitioners encounter every day. 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.

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

SEMINAR OUTLINE
• Incorporation and integration issues including planning and recent developments
• Small business deduction including criteria, management fees and personal service businesses
• Remuneration issues including salary vs. dividends, 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 benefits and loans issues including debit balances.
• Selected timely and topical practical matters of interest to practitioners.
• Practitioners’ library of facts, figures, deadlines, income tax resources, ideas.
• Common traps and pitfalls illustrated through practical, realistic examples and situations (bonus material – covered in class when time permits).

WHO WILL BENEFIT
Practitioners that have general income tax knowledge and deal with small and medium-sized owner-managed businesses.

PREREQUISITE
General corporate and personal income tax knowledge.

SEMINAR LEADER/S (see Instructor Bios)
Rob Jeffery, CA, CPA (CO)

GST/HST & Real Property
Formerly: GST/HST & Real Property: Tips & Traps
PD15160281 | Reoffering
Level: Intermediate

OBJECTIVE
The application of GST/HST to real property transactions can be very complex, particularly when part of the property may include a residential property. This seminar will help you increase awareness of some of the important concepts and rules including the deemed supply rules, identification of and distinction between taxable and exempt sales and rentals of real property, input tax credit and rebate entitlements and problems associated with vacation rental property, care facilities and supplies of real property by charities and other public service bodies.

WHO SHOULD ATTEND
General practitioners and advisors involved in the purchase, sale or rental of real property.

BENEFITS OF ATTENDING
The rules relating to real property are complex. Failure to appreciate these complexities, especially rules related to deemed supplies and exemption entitlements can result in significant and unexpected liabilities.

CONTENT
• Introduction and basic concepts
• Deemed self-supply rules
• Major exemptions
• Residential rebates
• Collection and remittance of tax
• Use of joint ventures
• Input tax credit entitlements & restrictions
• Special rules for not-for-profit sector
• HST transitional rules

PREREQUISITE
General understanding of GST/HST and input tax credit system.

SEMINAR LEADER/S (see Instructor Bios)
Jeremy Scott, LLB

June 25, 2015, 9am - 5pm
ICANS Learning Centre
1 Passport Day | 7 PD Hours
Income Splitting  
PD15160291  |  Reoffering  
Level: Introductory to Intermediate  

OBJECTIVE  
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. In recent years, legislation has been introduced which has significantly reduced the opportunities to split income, especially with minor children. Practitioners should be aware of these rules to ensure they are not caught unaware. Remaining opportunities for 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, including new and proposed changes to legislation. 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/S (see Instructor Bios)  
Greg Leslie, CA

June 18, 2015, 9am - 12pm  
ICANS Learning Centre  
½ Passport Day  |  3 PD Hours

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Income Tax Issues Dealing with Real Estate  
Formerly: Tax Issues In Real Estate: What Do You Need to Know?  
PD15160311  |  Reoffering  
Level: Intermediate  

OBJECTIVE  
This seminar identifies and reviews all the significant income taxation issues arising in various aspects of real estate activities. Starting with a review of the structures available to undertake real estate transactions, the course follows with a detailed look at income tax issues arising on the acquisition, development, holding and then disposition of Canadian real estate. While the seminar substantially focuses on income tax rules, a very brief review of GST, HST and provincial tax issues are also identified for consideration. Due to the emphasis on income taxes, this course does not provide a detailed or complete discussion of the impact of indirect taxes on real estate.

WHO SHOULD ATTEND  
The seminar is aimed at persons who want to gain an understanding of specific income tax rules and related issues that arise when dealing with all aspects of real estate activities. It should benefit practitioners in public practice and members in industry who need to be aware of and/or work with income taxation issues arising in real estate transactions. Participants attending this seminar should feel comfortable that they will be able to identify any significant income tax issue that may have to be addressed when contemplating or undertaking a real estate transaction. The seminar includes practical, business-focused comments on dealing with many of these tax issues.

BENEFITS OF ATTENDING  
At the end of this seminar the participant should have the ability to identify specific income tax issues related to real estate activities and understand the implications of tax issues involved in dealing with most common forms of real estate investment.

CONTENT  
Discussion of the following areas:
- Alternative structures for investment in real estate
- Pre-acquisition issues
- Acquisition and holding property
- Development issues
- Holding properties
- Dispositions of properties
- General overview of other taxation issues that may impact real estate activities including corporate reorganization rules, foreign real estate and indirect taxes (i.e. GST and HST)
- Provincial matters

SEMINAR LEADER/S (see Instructor Bios)  
Earl MacLeod, CA  
Stephanie Smith, CA

June 17, 2015, 9am - 5pm  
ICANS Learning Centre  
1 Passport Day  |  7 PD Hours
Income Tax Planning Refresher for Corporate Tax
PD15160321 | New
Level: Intermediate

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

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

WHO WILL BENEFIT
Those involved in corporate tax matters that desire to expand or refresh their knowledge of corporate tax.

SEMINAR LEADER/S (see Instructor Bios)
David Cameron, CA

May 21-22, 2015, 9am - 5pm
ICANS Learning Centre
2 Passport Days  |  14 PD Hours

Income Taxation of Portfolio Investments for Individuals
PD15160331 | Reoffering
Level: Introductory

Accountants are continually challenged by the creativity in the design and marketing of investment products and strategies. With the proliferation of new products, questions often arise regarding the taxation of the income component. This course will explain the application of income taxation to various investment products to assist in personal income tax filings and introduce the participant to after tax comparison of alternative investment strategies.

WHO WILL BENEFIT
Practitioners who would like to obtain or enhance their working knowledge of personal income taxation of portfolio investment products. Individuals and advisors who would like to enhance the tax effectiveness of personal portfolio holdings.

LEARNING OUTCOMES
At the end of the course, you should be able to:
• Prepare individual income tax returns more effectively
• Advise clients on the income tax implications of diverse portfolio investment products
• Assist clients in improving the tax effectiveness of their portfolio holdings

TOPICS INCLUDE
Investment Income Taxation – General Rules
• Canadian Source Income from Property (Rents, Royalties, Interest, etc.)
• Dividend Tax Credit
• Capital Gains
• Foreign Source Income/Foreign Tax Credits/Treaty Exclusions
• Special Treatment – Charitable Donations/Other Transfers
Deposit Accounts
• Bank Accounts
• Term Deposits
• Guaranteed Income Certificates/Accounts (GIC/GIA)
Shares
• Common, Preferred, Flow Through
• Reorganizations
• Puts and Calls
Bonds
• Conventional aka Nominal
• Real Return – inflation indexed
• Stripped
• Premium and Discount Bonds
Treasury Bills
Exchange Traded Funds (ETF)
Real Estate Investment Trusts (REIT)
Specified Investment Flow Through Trusts (SIFT)
Limited Partnership
Mutual Funds
• Trust
• Corporate
Life Insurance
• Accumulation Policies
• Segregated Funds
Registered Funds
• RRSP, RRIF, LIRA, LIF, TFSA, RESP, RDSP
• Planning a Retirement Portfolio

SEMINAR LEADER/S (see Instructor Bios)
Jeff Christian, CA

June 24, 2015, 1pm - 4pm
ICANS Learning Centre
½ Passport Day  |  3 PD Hours
Tax Issues for Private Corporate Groups
PD15160341 | Reoffering
Level: Intermediate

OBJECTIVE
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 taxation 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/HST issues
• loss utilization and the stop-loss rules

SEMINAR LEADER/S (see Instructor Bios)
Henry Visser, CA, LLB, TEP

May 20, 2015, 1pm - 4pm
ICANS Learning Centre
½ Passport Day | 3 PD Hours

Tax Issues in Shutting Down a Corporation
PD15160351 | Reoffering
Level: Intermediate

OBJECTIVE
This course will focus on the many tax issues that arise - both compliance and planning-related - when shutting down a corporation. It will primarily focus on private companies. It will deal with taxable wind-ups, tax-deferred wind-ups, tax-deferred amalgamations, and issues impacting shareholders of companies that are being “shut down”. Common traps and planning opportunities will be discussed.

WHO SHOULD ATTEND
Members who are involved in winding up/dissolving corporations or who advise clients that are involved in winding up/dissolving corporations. Particular focus will be placed on private companies.

BENEFITS OF ATTENDING
Attendees will broaden their understanding of tax compliance requirements, tax traps, and tax planning opportunities that arise when shutting down corporations.

CONTENT
• taxable wind-ups
• tax-deferred wind-ups
• tax-deferred amalgamations
• issues impacting shareholders of corporations being shut down
• issues relating to winding-up dividends
• tax issues relating to the disposition of shares and debts
• debt forgiveness issues that arise on winding up
• losses and ABILs
• clearance certificates, liability for tax debts, tax refunds, assessing a dissolved corporation
• PUC and ACB issues
• basic issues relating to foreign subsidiaries

SEMINAR LEADER/S (see Instructor Bios)
Bobby Boutlier, CA

May 20, 2015, 9am - 12pm
ICANS Learning Centre
½ Passport Day | 3 PD Hours
TAX

**Tax Planning for Private Enterprises on Business Succession**

**PD15160361 | Reoffering**

**Level: Intermediate**

**OBJECTIVE**

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

**WHO SHOULD ATTEND**

This seminar will be useful to accountants in public practice with clients who are owner-managers of private corporations, as well as in-house professionals of private enterprises.

**BENEFITS OF ATTENDING**

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

**CONTENT**

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

**SEMINAR LEADER/S (see Instructor Bios)**

Robert Dean, CA, CFP

May 19, 2015, 9am - 5pm

ICANS Learning Centre

1 Passport Day | 7 PD Hours

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**Taxation of Employee Benefits**

**PD15160371 | Reoffering**

**Level: Intermediate**

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

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

**SEMINAR OUTLINE**

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

**WHO WILL BENEFIT**

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

**PREREQUISITE**

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

**SEMINAR LEADER/S (see Instructor Bios)**

Greg Leslie, CA

June 11, 2015, 9am - 12pm

ICANS Learning Centre

½ Passport Day | 3 PD Hours
HUGH AVERY, CA•IFA, CAMS is a Forensic Audit and Accounting Representative with the Forensic Accounting Management Group of Public Works and Government Services Canada. Hugh is currently seconded to the Proceeds of Crime Unit of the RCMP in Halifax where he conducts forensic accounting engagements, participates in searches and technical interviews in support of investigative work, and assists investigators by providing advice in the preparation of documents during the course of legal procedures, he also testified before the courts as an expert. Hugh obtained his CA designation in 1998, his Certified Anti-Money Laundering Specialist designation in 2005 and received his IFA designation in 2010. In 2008 he received his graduate diploma in Investigative and Forensic Accounting from the University of Toronto.

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.

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

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

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

BLAIR COOK, CA, CPA (IL), MBA serves as a corporate director for a number of Canadian listed companies. As founder of the Finance Learning Academy, he also designs, develops, and delivers innovative blended learning development programs for professionals working in the fields of finance, accounting, and auditing. In addition, he continues to be a regular instructor at St. Mary’s University and the CPA Atlantic School of Business. In recent years, he has fulfilled the CFO role in a number of privately held and publicly traded entities.

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

CHRISTINE DOUCET, LLB is a partner with the Halifax law firm of McGinty Doucet Walker and practices primarily in the area of family law. She has a particular interest in the financial aspects of separation and divorce as they relate to the division of matrimonial property and determination of income for support purposes. Ms. Doucet is a trained collaborative family lawyer and president of the Association of Collaborative Family Law Professionals of Nova Scotia. She is a member of the executive committee of the Nova Scotia branch of the Canadian Bar Association.

ALEX FISHER, CPA, CA is a Principal with the Chartered Professional Accountants of Canada (CPA Canada) and is dedicated to helping Canadian practitioners and members in industry understand and apply International Financial Reporting Standards (IFRSs). Alex is working closely with the Mining Industry Task Force on IFRSs, Task Force on IFRSs, Investment Funds Standing Committee, and the Small Company Advisory Group, to develop practical, understandable, and timely guidance on various IFRS application issues. Alex is also a part-time instructor at the Schulich School of Business, York University, teaching undergraduate and graduate courses.

TONY GILL manages strategic projects in corporate real estate for a large Canadian retailer and also lectures for CPA Canada and York University. Published extensively, he is on the editorial board of the Corporate Real Estate Journal in London and the Advisory Board of the Telework Coalition in Washington D.C. Tony received undergraduate degrees in English Literature from the Florida State University, and Economics at the University of Waterloo. He also holds an MBA in finance and real estate from The University of Florida.

MAUREEN GILLIS, CA is an experienced CA with strong leadership, motivation and coaching skills who enjoys challenges, teaching, learning, and excels at strategic thinking, and relationship building. She has been working with Nova Scotia Community College for the past 8 years. Maureen has taught various aspects of accounting on a part time basis to aspiring accountants, including teaching at Saint Mary’s University, Mount Saint Vincent University, as well as (what was formerly) Doane Raymond and the Atlantic School of Chartered Accountancy. She designed and taught the public sector focused Financial and Managerial Accounting course for the Masters of Public Administration program offered through Dalhousie University, where she then designed an online version of this course for the University so that they could attract students from across Canada. Her experience in facilitating adult education is enhanced with a passion for the study of leadership and success. She is active in her local and professional communities having volunteered during her career with PSAB, ICANS, JA, FMI, the Chamber of Commerce, Middleton Regional High School, as well as other charitable organizations.

VERONICA HUNT, CA is an Audit Senior Manager with Grant Thornton’s Nova Scotia Business Unit with 8 years of public practice experience. Veronica is responsible for leading the delivery of audit and advisory services with experience in a variety of clients and industries with a primary focus on audits of public companies and complex private organizations.

ROB JEFFERY, CA, CPA (CO) is the Senior 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.

DAN JENNINGS, CA, CBV, CF is a Partner with BDO, based in Bedford, NS. He leads the firm’s Atlantic Valuation/M&A practice for small and mid-market entrepreneurial businesses. Dan has presented to various groups in the accounting, banking, legal and entrepreneurial sectors, and has provided expert witness testimony in both the NS and NB courts as well as the Federal Tax Court.

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K2 ENTERPRISES CANADA and its US partner K2 Enterprises is the pre-eminent provider of technology-focused continuing professional education to accountants and other professionals in Canada and the United States. K2 Enterprises Canada offers seminars on Excel, Word, PowerPoint, Outlook and Access. In addition our PD seminars include internal controls, cloud computing, tech tools to prevent fraud, Adobe PDF and overviews of current technology for accountants.

BRETT KNOWLES has established a global reputation for his work in the performance measurement and management area over the last 25 years. Brett founded the first Balanced Scorecard application and has created a number of innovative scorecard implementation methodologies which have been licensed by consulting and software organizations. To date, Brett and his organisation have completed more than 2,000 scorecard projects around the world. Clients include Nike, State Farm Insurance, the LRS, Ontario Ministry of Finance and Meridan Client Union, to name a few.

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

EARL MACLEOD, CA is a Partner with WBLI LLP Chartered Accountants in Dartmouth. He has experience with a wide variety of clients dealing in business advisory and tax services including corporate reorganizations, estate and succession planning, international taxation, and personal, corporate and trust tax planning. Earl has authored numerous articles for business publications and has presented ICANS PD courses and at the Atlantic Provinces Tax Conference.

DOREEN MALONE, CA, CFP is a Sr. Private Banker with BMO Harris Private Banking with a background in both the private and not-for-profit sectors. In her current role, she provides integrated and customized financial solutions to a portfolio of borrowing and non-borrowing Platinum Banking clients. She specializes in working with financially successful Canadian families to help them achieve their goals. Prior to joining BMO Harris Private Banking, she was a Financial Planner with Assante Capital Management and the General Manager of Neptune Theatre for 11 years. Previous to that she was the Director of Finance & Operations for Confederation Centre of the Arts in Charlottetown and a Senior Manager at Grant Thornton. Doreen is a graduate of St. Mary’s University and of an Executive Leadership Conference at Harvard University’s John Kennedy School of Government.

CRAIG MALONEY, MBA, CA, CBV, is a Partner at WBLI Chartered Accountants. Craig is heavily involved in servicing owner-managed businesses and professionals. He specializes in business valuation and providing strategic business advice and corporate finance advice on M&A transactions, and has developed a particular expertise in private company divestitures. He has industry and functional experience in leveraged buy-outs, capital raising, divestitures and acquisitions. Craig has also provided strategic advisory services and pricing analysis for various companies. Craig has unique past experience working with a private window and door manufacturing company in London, Ontario in both sales and materials management roles. Prior to joining WBLI, Craig worked for Deloitte & Touche Corporate Finance and also worked for Ernst & Young in both corporate finance and audit roles, both in Toronto, Ontario.

KEITH MARTIN, CPA, CA, is the founder of H.M Advisors Inc., a business advisory practice focusing on providing critical business planning and development for entrepreneurs. He has experience as Chief Financial Officer and Chief Operating Officer of a large, privately held industrial commercial investment contracting firm, where his time and efforts were equally focused on all aspects of the business, including human resources, strategic planning and operations.

SUSAN MCISAAAC, 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 a past member of the Practice Review Committee and is a member Practitioner’s Forum Committee of ICANS. Susan has instructed multiple PD offerings for ICANS for many years.

PETER MCELLENN, QC is a Senior Partner with Stewart McKelvey’s Labour and Employment group in our Halifax office.

With over 35 years experience, he frequently appears before Courts, Tribunals and other agencies on behalf of employers. Peter is a respected advisor to businesses on Labour and Employment issues including pensions and employee benefits. He is the Past President and a founding director of the Canadian Bar Association’s Labour and Employment section and has been a member of the Practice Review Committee and is a member Practitioner’s Forum Committee of ICANS. Peter is a member of the Bar of Nova Scotia and holds a Bachelor of Arts from Mount Allison University and a Bachelor of Laws from Dalhousie University.

JIM MUSGRAVE, QC, Chartered Mediator, is a Halifax-based lawyer, arbitrator and mediator with the Atlantic Canada regional law firm Cox & Palmer. An active trainer on mediation skills and techniques, Jim is also currently National President of the ADR Institute of Canada – the first President from Atlantic Canada in that organization’s history. ADR Institute of Canada is the internationally-recognized body that sets the standards for, and accredits, mediators and arbitrators everywhere across Canada.

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

RICHARD NIEDERMAYER, LLB, TEP is a partner in the Halifax office of Stewart McKelvey. His practice involves all aspects of tax and estate planning, estate administration, estate litigation and corporate/ commercial matters. His clients include owner-managed businesses, high net worth individuals and trust companies. Richard is the Past Chair of the Canadian Bar Association’s National Wills, Estates and Trusts Section and Past Chair of the Atlantic Canada Branch of the Society of Trust and Estate Practitioners. He is a member of the Canadian Tax Foundation, the Halifax Estate Planning Council (former President) and the Nova Scotia Barristers’ Society. Richard is listed in Best Lawyers in Canada for Trusts and Estates and Corporate Law and in Lexpert for Estate and Personal Tax Planning/Estate Litigation. He holds a BV Distinguished peer reviewed rating from Martindale Hubbell and the TEP designation from STEP. Richard is a frequent writer and speaker on estate and tax topics.
EILEEN PEASE, BA, B.ED., M.ED., CHRP, has 25 years’ experience teaching many courses related to thinking and interpersonal skills in the workplace. Recently she tapped into the most up to date knowledge on brain research to write her book “Get More Power from Your Brain” which was published in November 2014. Eileen knows how to help you get the most value out of your own creativity, thinking, decision making, willpower, reading time, concentration, and memory. Eileen also has a particular interest in mental health in the workplace. She has been certified by the Canadian Mental Health Association, Ontario branch, to teach their Mental Health Works programs. She knows that a psychologically healthy work environment supports employee engagement, recruitment, retention, productivity, effective risk management and corporate social responsibility.

RON PIZZO, LLB is a Partner in the law firm Pink Larkin. He was admitted to the Nova Scotia Bar in 1987. He holds certificates in Alternate Dispute Resolution (ADR) and advanced ADR. His primary area of practice is labour and employment. He represents large institutional clients and has appeared before arbitrators, labour boards, human rights tribunals and Courts throughout Atlantic Canada. Ron has extensive experience resolving disputes through ADR processes, including mediation, arbitration and med-arb. Ron also provides strategic guidance and advice to businesses and organizations for resolving conflicts early.

STEVE PRENTICE, is the president of the Bristall Group, a consulting firm with offices in Toronto and clients across the globe. Steve’s expertise focuses on the interaction between people and technology and he is well-known for his work in time management and productivity. Steve has delivered workshops and keynotes to hundreds of well-known organizations across Canada and the U.S. and is in high demand as a personal coach and mentor. Steve lectured in management strategy for the University of Ontario Institute of Technology (UOIT) and is a senior writer on cloud technology for CloudTweaks.

KURT ROSENTRETER, CPA, CA, is a “Family CFO” and Senior Financial Advisor with Manulife Securities Incorporated in Toronto. Kurt is the past co-founder of the National Wealth Management Practice at one of Canada’s Big Four accounting firms, where he assisted to grow the practice to $2 Billion dollars of assets under management. He is a national best-selling author on wealth management and a regular contributor on money matters in the national press. Kurt is into his eleventh year as an instructor at CPA Ontario. Learn more about Kurt at www.kuritsmycfo.com.

JEREMY SCOTT, LLB is the Director of Sobey Inc.’s Sales Tax Group. Prior to accepting this role, he was a Senior Manager with Grant Thornton LLP in Halifax, focused in the area of sales tax. Specifically, Jeremy has experience dealing with the Federal Goods and Services Tax (GST and HST), Provincial Sales Tax, Excise Tax, Tobacco Tax, Fuel Tax, and Gasoline Tax. He has written articles for tax publications and has presented at a number of commodity tax conferences, seminars and professional development workshops.

LORRIE SLADE, P.ENG received a degree in Industrial Engineering from Dalhousie University. After working as a Process Engineer for 10 years, she turned her focus to project management and is currently Service Line Leader of Training for Pinnacle Project Management. During her time with Pinnacle, Lorrie has held positions as a Project Management consultant and has developed and facilitated several courses.

STEPHANIE SMITH, CA Stephanie Smith, CA is a Tax Associate in the tax group of WBLI LLP Chartered Accountants in Dartmouth. Stephanie works primarily with owner managers and professionals. She has experience in a wide range of areas of taxation including personal and corporate tax planning, compliance for personal, corporate, and trusts, corporate reorganizations, and estate planning.

DAVID STRONG, CA has over 15 years experience in public accounting. Two years ago, and after 13 years with a national firm, David started his own practice with a focus on providing advisory and assurance service to a variety of small and medium sized owner-managed businesses.

HENRY VISSEER, 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 Tax Foundation (national and Atlantic conferences), Canadian Bar Association (Nova Scotia and New Brunswick), the Institute of Chartered Accountants of Nova Scotia, the Institute of Chartered Accountants of Prince Edward Island, the Atlantic Provinces Tax Seminar, the CPA Commodity Tax Symposium, STEP Atlantic, and McInnes Cooper’s annual tax tour, has written for the Federated Press Resource Sector Taxation Journal and Carswell’s Tax Hyperion, and is a frequent contributor of articles to McInnes Cooper’s Tax Brief and Tax Flash publications.

MARA VIZZUTTI, (B.ED), ACC, Org. Dev. and Leadership, is a seasoned facilitator and an accredited certified executive coach. Originally from western Canada, she has spent over 10 years working for a well-respected training company in Alberta delivering the renowned Excellence Series, seminars in personal leadership development. Over the past 15 years Mara has facilitated high caliber trainings to audiences of senior executives, supervisors and front line employees in diverse industries. During the course of her career, she has completed numerous training programs and is currently completing a Master’s degree in Organizational Development and Leadership. Prior to her facilitation career, Mara enjoyed a successful career in sales and management. Mara’s areas of expertise include: team building, leadership development, transformational coaching and effective communication systems. Mara works with organizations to improve engagement showing leaders how to communicate effectively and successfully develop their future leaders. She is committed to creating more collaborative, inspiring work environments where people feel engaged. Her goal is to transform the process of business communications and to facilitate collaboration and healthy relationships in the workplace.

SCOTT WEATHERBY, CA is the Chief Financial Officer and Corporate Secretary of Newfoundland Capital Corporation Limited (TSX: NCC.A, NCC.B) which operates Newcap Radio, one of Canada’s leading radio broadcasters with 95 licences across Canada, including the recent expansion into Toronto and Vancouver as well as the local radio stations Q104 and Radio 96.5. He has been with the Company for over 14 years and is responsible for public reporting, corporate finance, treasury, corporate taxation and investor relations. He is also a key member of the Company’s strategic M&A team having been involved in numerous business acquisitions, divestitures and a subsidiary’s IPO. Prior to joining Newcap, Scott spent ten years with Grant Thornton LLP, having various auditing and advisory roles as well as spending three years in the Firm’s National Human Resource Department with professional development, teaching and course development responsibilities.
NEW - Live broadcasts are seminars delivered live and can be accessed anywhere that you have access to the internet. Participants watch the seminar leader deliver the seminar, and have the PowerPoint presentation on their screen at all times. You will receive access to the pdf file of the seminar materials prior to the seminar date. A live chat option allows online participants to submit questions, so you will always feel like you are part of the room. Course fee: See Pricing Information - can be used as passport days. For detailed descriptions visit: www.icans.ns.ca/professional-development/cpd-opportunities/item80156.aspx

Commercial Real Estate for Corporate Strategy & Professional Accountants
PD15162247 | Strategy and Governance

Next to HR and IT, real estate represents one of the largest costs to an organization, yet it is often misunderstood. The impact of not sufficiently connecting disparate bits of information can have a significant financial cost on an organization. Possessing this knowledge can influence how operating costs are managed, cash flow is increased, and return on investment is maximized. This is particularly relevant to professional accountants who drive an organization’s strategic direction, as it offers a more holistic view on how all the pieces fit together and align with an organization’s underlying objectives. This workshop will provide a logical framework to connect these pieces together and is structured to discuss foundational, quantitative and strategic elements.

SEMINAR LEADER/S (see Instructor Bios)
Tony Gill

May 20, 10am – 5:30pm
1 Passport Day | 6.5 PD Hours

Enterprise Risk Management
PD15162254 | Strategy & Governance

Enterprise risk management (ERM) is quickly evolving beyond traditional regulatory conformance. ERM frameworks are linking performance into the view of risk. Attend this seminar to learn how organizations are able to balance risk and rewards by integrating best practices in strategy, risk, and performance management. This seminar will teach you how to leverage ERM solutions to identify and mitigate risk, and how to implement a response strategy for an organization and strengthen internal controls.

SEMINAR LEADER/S (see Instructor Bios)
Brett Knowles

July 16, 10am – 5:30pm
1 Passport Day | 6.5 PD Hours

Essential Topics for Controllers
PD15162242 | Management Accounting

Accountants have many opportunities to develop technical, financial based skills through professional training. However, as an accountant’s career progresses the importance of technical skills compared to soft skills shifts. As a financial manager it is the combination of these soft skills and technical abilities that will define your career and determine advancement and future opportunities. By attending this seminar, you will gain practical insights into seven skills in which managers are expected to be proficient, but receive little training for: conducting an employment interview; strategic planning basics; negotiating skills; performance evaluations; managing versus leading; knowing your communication skills; and terminating an employee.

SEMINAR LEADER/S (see Instructor Bios)
Keith Martin

May 26, 10am – 5:30pm
1 Passport Day | 6.5 PD Hours

IFRS - Resource Exploration and Mining Industry
PD15162255 | Financial Reporting

This seminar provides participants with a good understanding of the accounting standards relevant to resource exploration and mining and the specific application of the standards to industry issues. The instructor will cover all the stages an accountant will have to follow to support a client or organization in the resource exploration and mining industry. You will learn from the beginning, discussing exploration for an evaluation of mineral resources, to the end including, financial statement presentation and reporting and IFRS disclosures.

SEMINAR LEADER/S (see Instructor Bios)
Alex Fisher

July 21, 10am – 5:30pm
1 Passport Day | 6.5 PD Hours
**Personal Investing**  
**PD15162250 | Wealth Management**

Mutual funds, stocks, GICs, bonds, income trusts - are you overwhelmed by investment choices in the marketplace today? What do you put in your RRSP? Your child's RESP? Your TFSA? Should you hire an investment advisor, portfolio manager or investment counselor to help you manage your money or should you do it yourself? How do you construct an investment portfolio? How do you evaluate what you currently hold in your accounts? Are you achieving the returns you expected? Kurt Rosentreter is one of Canada's pre-eminent experts on wealth management, author, and has over twenty years of experience advising Canadians on money management. Kurt leads you through a fast-paced session, with blunt and direct commentary on Canada's investment landscape today. This seminar is one of Kurt's most popular and well-attended seminars.

**SEMINAR LEADER/S (see Instructor Bios)**  
Kurt Rosentreter

June 4, 10am – 5:30pm  
1 Passport Day | 6.5 PD Hours

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**Securing Your Data - Practical Tools for Protecting Information**  
**PD15162251 | Information Technology**

Encrypting sensitive information, acquiring and using e-signatures, security tools to secure sensitive data and systems - these are all important tools to help keep an organization's confidential information secure. Security is not optional and outdated security techniques are not working as effectively as they once were. It's time for professionals to tune up what they know about protecting sensitive data. Security failures, such as a breach of client or customer data, are costly they can even drive an organization out of business. In this seminar, you will learn about the latest tools and techniques for encryption, virus protection, secure communications, secure authentication, and more. The seminar is taught by explaining and demonstrating each of these tools and techniques.

**SEMINAR LEADER/S (see Instructor Bios)**  
K2 Enterprises

July 7, 10am – 1pm  
½ Passport Day | 3 PD Hours

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**Time Management Strategies**  
**PD15162252 | Professional & Leadership Skills**

Based on a sound combination of project management and psychology, and on the best-selling book, Cool Time: A Hands-On Plan for Managing Work and Balancing Time, this seminar approaches time management, productivity and work-life balance from a different perspective. The strategies taught in this seminar will not only allow participants to develop new best practices through an understanding of personal strengths, weaknesses, and attributes, but also guarantees successful implementation by delivering straightforward concepts that are easy to learn and implement, and take back to the workplace to teach to others. Blending classic common sense with the realities of the modern workplace, this seminar has been delivered with great success to thousands of accounting professionals.

**SEMINAR LEADER/S (see Instructor Bios)**  
Steve Prentice

June 18, 10am – 5:30pm  
1 Passport Day | 6.5 PD Hours
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 2-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.

May 18, 2015 | October 19, 2015
Member $440* Non-Member $540 14PD Hrs
*PD Passport Holder $340 PD Passport Discount

ASPE: A Survey of the Standards
DL15160031 | DL15160032 Level: Intermediate
This new seminar replaces the CICA Handbook Accounting Refresher. Its main objective is to provide a detailed review of ASPE, and is designed for individuals seeking an in-depth, detailed review of ASPE. The material is not a comparison of ASPE to IFRS or GAAP, and will cover only ASPE. However, given that 95% of the corporate entities in Canada are private, the course does have broad appeal and is equally applicable to non-corporate private enterprises. Individuals who have been detached from Canadian standards in recent years may especially find this course beneficial to regain a strong technical accounting base. All ASPE Handbook sections will be reviewed and discussed in the material together with an introductory module discussing the changeover from GAAP to ASPE.

CAS Auditing Refresher
DL15160011 | DL15160012 Level: Introductory
The new Canadian Auditing Standards (CASs) become effective for periods ending on or after December 14, 2010. This course will provide participants with a solid foundation in the practical application of the CASs in the new auditing environment. You will learn an introduction and overview of the new CASs; how to perform an audit in the new CAS environment; and the key elements of an engagement working paper file.

IFRS: A Survey of the Standards
DL15160021 | DL15160022 Level: Introductory
This seminar provides participants with a solid introduction to the International Financial reporting Standards (IFRSs) that have come into effect in Canada in 2011. IFRSs that are under development at the IASB with expectation for introduction after changeover will also be reviewed. Not all IFRSs are covered. Focus is on the IFRSs that apply to most profit-oriented entities that are different from Canadian GAAP. Note that this seminar is not a direct comparison with Canadian GAAP.

Income Tax Refresher for Corporate Tax Planning
DL15160051 | DL15160052 Level: Introductory
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.

Income Tax Refresher for Personal Tax Planning
DL15160041 | DL15160042 Level: Introductory
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.
**PD AudioWeb**

_Web-Based and Eligible for Verifiable CPD Hours!_

PD AudioWeb are direct recordings from live PD seminars.

These recordings are available as downloadable MP3 audio files, along with any corresponding handout materials in PDF files, from our website.

These titles are 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.

**HOW TO GET STARTED**

After you purchase your AudioWeb 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” AudioWeb titles will be available two weeks after the classroom seminar date – please take this into consideration before placing your order
- most titles are recorded from Executive Breakfast sessions, and are eligible for 2 Verifiable CPD hours each – half-day sessions are eligible for 3.5 Verifiable CPD hours each, and are denoted with an "***"

All PD AudioWeb titles are $65 each + GST unless otherwise noted.

See link below to view and order PD AudioWeb from the Institute of Chartered Accountants of British Columbia.

http://pd.bccpa.ca/pd-seminars.php  
(click on Web-Based PD Seminars)
ADDITIONAL PD OPPORTUNITIES

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

Taxable Benefits And Allowances
CP15160011
Level: Compliance
One of the most common audit issues is excluding taxable benefits and allowances from employment income. Employers are responsible for: determining whether the benefits they offer are taxable to their employees, adding the value of those benefits to reportable income; and, withholding, remitting and reporting the required statutory deductions to Canada Revenue Agency (CRA) and Revenu Québec (RQ). This seminar offers an in-depth review of applicable legislation and regulations and explains the key concepts used by CRA and RQ to evaluate taxability and assess more than 40 common benefits, including automobile allowances, loan and stock options, gift cards and more.

WHO SHOULD ATTEND
All payroll/human resources professionals or anyone responsible for calculating taxable benefits and allowances for employees within their organization.

Thursday, April 16, 2015, 8:30 AM – 4:30 PM
Holiday Inn Express, 133 Kearney Lake Rd, Halifax

Best Practices Of Employee Group Benefits
CP15160031
Level: Advanced
This full day seminar will explore advanced tools of the Employee Benefits industry. It will provide a comprehensive, in-depth overview and analysis on employee benefits best practices to better equip participants with the tools to become better negotiators at renewal. This course will focus on group benefits primarily from a payroll, human resources and financial point of view. It is recommended that payroll professionals attend this session every two years.

Attending certified payroll professionals receive 7.5 hours of continuing professional education (CPE).

WHO SHOULD ATTEND
• Accounting managers and other professionals who need to be aware of cost implications of your benefits plan both short and long term
• Human Resources and office managers and other business professionals with a functional responsibility for payroll and/or benefits
• Organizations who want to review, analyze and understand their own benefits statements and reporting
• Any payroll or human resources professional new to an organization or their position.
• Other positions recommended attending: Office managers, business professionals, payroll practitioners.

Friday, May 8, 2015, 8:30 AM – 4:30 PM
Holiday Inn Express, 133 Kearney Lake Rd, Halifax

Employment Standards
CP15160041
Level: Compliance
Finding the right information on Employment Standards in each jurisdiction can be challenging. This compliance seminar provides you with an in-depth understanding of employment standards legislation in every province—in plain language. Get the latest legislative updates and valuable tips to help you stay compliant and avoid litigation on topics such as: determining and calculating hours of work (overtime, compressed work weeks and averaging hours); statutory holidays and vacations; processing paid and unpaid legislative leaves (sick leave, maternity, parental, bereavement, etc.); and terminations.

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

Friday, June 19, 2015, 8:30 AM – 4:30 PM
Holiday Inn Express, 133 Kearney Lake Rd, Halifax

Register early and save - Early bird rates apply until two weeks prior to the seminar.

7 PD Hrs Cost: $449 /Early bird: $399
*Passport Discount $140, counts as 1 passport day

PASSPORT DISCOUNT
Chartered Professional Accountants of Canada
Professional Learning and Development

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

For additional information on our programs, visit: cpacanada.ca/2015Programs

INCOME TAX

COURSES

• CPA Canada In-Depth Tax Course
  Registration opens July 7, 2015

• Foundations in International Tax
  September 26-30, 2015, Whistler, BC

• Income Tax Practice – West
  October 31-November 6, 2015, Banff, AB

BLENDED LEARNING

Elearning combined with classroom session

• Accounting for Income Taxes
  Elearning: Online Access – Available Now
  Classroom Session – May 7, 2015, Toronto, ON

INDIRECT TAX

COURSES

• Forum on U.S. State and Local Taxes for
  Canadian Companies
  June 15-16, 2015, Toronto, ON

• Commodity Tax Symposium
  September 28-29, 2015
  (optional workshops September 30) Ottawa, ON

ADVANCED HST/GST COURSES

Elearning: Online Access – Available Now

• Cross-Border Transactions
• Financial Services
• Public Sector Bodies

TRANSFER PRICING

• In-Depth Transfer Pricing Course – Elearning
  Online Access – Available Now

FINANCIAL AND MANAGEMENT ACCOUNTING AND REPORTING

THE PUBLIC SECTOR

• Public Sector Financial Reporting and Accounting Course
  May 20-21, 2015 (third day is optional), Toronto, ON

• CPA Canada’s Public Sector Conference
  October 7-8, 2015, Ottawa, ON

SPECIALITY AREAS

• Practitioners Symposium and TECH+ Conference
  Presented in cooperation with the AICPA
  June 7-10, 2015, Orlando, FL

• Expert Witness Workshop
  Presented in cooperation with the AICPA
  September 2015, Washington, DC

• In-Depth Brokers and Investment Dealers Course
  Presented in cooperation with IIROC
  October 14-16, 2015, Toronto, ON

CORPORATE FINANCE

• Valuation in Corporate Finance
  April 20-21, 2015, Toronto, ON
  Fall 2015, Vancouver, Calgary, Montreal, Toronto

• Debt and Equity in Corporate Finance
  May 28-29, 2015, Toronto, ON
  Fall 2015, Vancouver, Calgary, Montreal, Toronto

• Governance, Ethical and Regulatory Issues in Corporate Finance
  Elearning: Online Access – Available Now

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

CPA Canada Online Professional Development

The largest library of elearning available for CPAs in Canada – Available now at cpacanada.ca/elearning

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

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

This intensive program is designed for CFOs and aspiring CFOs who are determined to move their career and their organizations forward. The CFO Leadership Program builds on core financial skills and prepares executives for the next step in their career.

Participants have included Chief Financial Officers, Vice Presidents of Finance, Vice Presidents of Operations, Directors of Accounting, Directors of Finance, Senior Controllers, and Treasurers.

May 30 – June 5 and October 18 – 24, 2015 – Banff, AB

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

Controllership

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

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

September 12 – 18 and November 21 – 27, 2015 – Banff, AB

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

MBA Financial Services at Dalhousie University

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 www.dal.ca/mbafs or 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 2015, choose from over 50 different seminars and certificate programs that will suit any stage of your career.

For more information: visit trainatsmu.ca, email epd@smu.ca or call 420.5638 or 1.800.877.0874
FAQ

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 is 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 9 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.

4. 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.

5. I don’t mind attending PD courses, but find that the seminars are “sold out” and I have limited time with virtually any other organization which delivers training courses. 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 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 ext. 23, fax at (902)423-4505 or email kslaunwhite@icans.ns.ca.
Continuing Professional Development

Members are referred to the ICANS’ website www.icans.ns.ca Professional Development 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 learning activities provide for the development of new or existing competencies relevant to a member’s professional responsibilities and growth; to qualify as verifiable study there must be some way to verify attendance at or completion of the learning activity. (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. The PD Committee has established guidelines concerning the documentation requirements for verifiable study. (Reference: Guideline – Documentation Requirements – Verifiable Study)

7. ICANS has introduced policies/procedures for purposes of verifying PD reports. (Reference: Bulletin #3)

8. The PD Committee will continue to grant waivers to individual members based on individual circumstances or classes of members. (Reference: Bulletin #4)

If you have further questions or concerns, please contact Danielle Roode, ICANS Membership Registrar, at (902) 425-3291 ext. 31 or at droode@icans.ns.ca.

Also on the ICANS website, Professional Development – Mandatory CPD, you will find

- Bulletins
  #1 Applicability
  #2 PD Learning Activities
  #3 Reporting / Verification / Documentation
  #4 Waivers
  #5 Reduction in ICANS’ PD Course Fees

- Guidelines
  Documentation Requirements – Verifiable Study

- 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

3 YEAR CYCLE
Current fixed 3 year cycle
Commencing January 1, 2014
Ending December 31, 2016