CONTINUING PROFESSIONAL DEVELOPMENT

FALL/WINTER 2014-2015

* Passport Deadline OCTOBER 17
Fall 2014

Dear ICANS Members:

Welcome to the Continuing Professional Development (CPD) 2014 Fall/Winter 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.

This brochure includes half, full and two-day sessions developed by the interprovincial Professional Learning and Development Programs Committee (PLDPC), many repeat entrepreneurial sessions and a number of new offerings. Also, ICANS is offering a new 3 day CEO Conference: “The CEO Program: Leading with Purpose” (page 14) scheduled from Nov 5 through 7, presented by Dr. Jim Murray who has been helping participants advance their careers for almost 40 years.

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 on page 96. 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 alternative. Passports are on sale now until October 17, 2014.

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.

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

Kathie Slaunwhite
Director, Professional Development
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<td>Audit of a Small Entity&lt;br&gt;PD14150541</td>
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<td>Review Engagements&lt;br&gt;PD14150551</td>
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<td>8</td>
<td>Tax for Controllers&lt;br&gt;PD14151321</td>
<td>9</td>
<td>Resiliency and Grit: You Have What It Takes to Bounce Back from Adversity and Challenge&lt;br&gt;PD14150951</td>
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<td>15</td>
<td>Accounting, Auditing and Professional Practice Update&lt;br&gt;PD14150313</td>
<td>16</td>
<td>ASPE - Accounting Update for Members In Industry&lt;br&gt;PD14150011</td>
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<td><strong>JANUARY 2015</strong></td>
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<td>Accounting, Auditing and Professional Practice Update&lt;br&gt;PD14150314</td>
<td>13</td>
<td>Income Tax Update&lt;br&gt;PD14151236</td>
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<td>19</td>
<td>PSAB 101&lt;br&gt;PD14151101</td>
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<td>GST/HST Issues for the Non-Profit Sector&lt;br&gt;PD14151191</td>
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<td>26</td>
<td>RIP - Estate Planning to Minimize Tax Leakage&lt;br&gt;PD14151291</td>
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<td>Advanced Estate Planning for Business Owners&lt;br&gt;PD14151111</td>
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<td>Best Practice in Practice Management PD14150461</td>
<td>General Practitioners “Need to Know…” PD14151161</td>
<td>ASPE - A Comparison to IFRS PD14150321</td>
<td>Root Cause Analysis PD14150971</td>
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<td>(PM) ASPE: Revenue Recognition PD14150371</td>
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<td>Interest, Penalties and Taxpayer Relief PD14151251</td>
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<td>Controllership - A Partner for Business PD14150581</td>
<td>Corporate Treasury Management PD14150591</td>
<td>Taxation of Domestic Trusts - Compliance PD14151391</td>
<td>Advanced CaseWare &amp; CaseView PD14150661</td>
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<td>Get Organized &amp; Take Control @ Work PD14150891</td>
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<td>Influential Leadership: Leading Teams and Others PD14150911</td>
<td>Effective Communication Skills for Outstanding Performance PD14150831</td>
<td>Scientific Research &amp; Experimental Development Tax Credits PD14151301</td>
<td>Dealing with Difficult People PD14150801</td>
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<td>Advanced Tax Planning Strategies PD14151121</td>
<td>Taxation of Domestic Family Trusts - Advanced PD14151381</td>
<td>Write With Confidence for Professionals PD14151081</td>
<td>Stress - Taking a Problem Solving Approach PD14151001</td>
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<td>Time and Priority Management PD14151051</td>
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<td>Improving Financial Performance for Controllers and CFOs PD14150611</td>
<td>Strategy and Risk Management for Financial Managers PD14150641</td>
<td>The Making of a Great Leader PD14151041</td>
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<td>Project Scheduling PD14150791</td>
<td>Strategic Relationship Skills for Influence PD14150991</td>
<td>Email Etiquette: Create the Right Tone &amp; Get the Best Response PD14150841</td>
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<td>Finding Flow: The Art and Science of Motivation PD14150871</td>
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<td>I’m Right – You’re Wrong! PD14150901</td>
<td>Get More Power from Your Brain PD14150881</td>
<td>Meetings to Live For! PD14150931</td>
<td>Stop Putting Things Off and Master Your Priorities PD14150891</td>
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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:

GST/HST for Professionals:
“Great overview”
“Very qualified teacher”
“Excellent use of examples”
“Good reference material. Covered many issues that we deal with in public practice”
“Really liked the real life examples”

Catching Up – 5 years of Income Tax Developments
“Quick overview when you’re not dealing with tax on a daily basis”
“Presenter had great sense of humour that helped with a relatively dry topic”
“Good refresher”
“Topic area, good refresher of materials”

Non-Government Controlled NFPOs – Financial Statement Presentation & Note Disclosure
“Good, solid information”
“Good and plenty of examples of F/S presentations”
“Course material and the binder is great!”

Business Valuation – Introduction
“I found it very interesting, not too technical and it gave a good overview of the valuation process”
“Reference material”
“Good examples in the text book”

ASPE – Disclosure & Presentation
“Broad yet practical coverage of everyday application of the topic”
“Very useful reference materials for practitioners”
“Timely topic”
“Handout should be a good reference for day to day issues”
“Specifically addresses issues I face every day; very good reference material practical”
“The example notes are good.”
“Very practical for public practitioners working through all of the required disclosures; very good reference materials to use in practice (eg. sample notes)”
“Good overview and update”

EXCEL Best Practices
“Practical questions from people in the course and answers from course leader were good”
“The instructor used examples that were relevant to work performed”
“Was able to address various versions of Excel”
“Well paced. Most topics were relevant to small business”

iPAD – An Effective Business Tool
“Very practical applications”
“The collaborating tools that are available to allow one to be more productive”
“Scope of the iPad and its Apps practical”
“Practical business applications for iPads demo’d along with estimated costs/pitfalls that may be encountered”
**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>$155</td>
<td>$190</td>
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<tr>
<td>1 Day</td>
<td>$280</td>
<td>$330</td>
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<tr>
<td>2 Day</td>
<td>$510</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 23% if only registering for three days of PD in one year. Organization Passports work potentially on the same basis, the more sessions taken, the bigger the savings, but this passport has the versatility of multiple users from the same company or firm (see *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>
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<td></td>
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<td>MEMBER</td>
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<td>FULL</td>
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<td>Individual</td>
<td>5 full/10 half</td>
<td>$600</td>
<td>$750</td>
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<tr>
<td>Organization</td>
<td>9 full/18 half</td>
<td>$2000</td>
<td>$2300</td>
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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)

CANCELATION 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 $25 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.

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 Fall/Winter PD courses will take place in the ICANS Learning Centre, Halifax (address will be confirmed on course confirmation). Halifax PD Week will be held at the WTCC and Cape Breton PD Week will be held at the Holiday Inn, Sydney Waterfront. 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
Non-Passport

REGISTRATION
THE DEADLINE FOR REGISTRATION is two weeks (14 days) prior to any course date. Registrations received from participants after those deadline dates will be subject to a $25 plus HST administration charge per course.

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

Passport

REGISTRATION
Deadline for the purchase of PASSPORTS is October 17, 2014. 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 $175 plus HST per full-day (not available for non-members) and $90 plus HST per half-day course (not available for non-members).

REFUNDS
NO REFUND will be made for passport cancellations received after the Passport deadline date. Refunds for withdrawals before that date will be subject to a handling charge of $25 plus HST per course.

ALL REGISTRATIONS MUST BE ACCOMPANIED WITH THE REGISTRATION FEE. (Registrations without fees or via phone will not be processed.)

CONDITIONS
Individual PD Passport
• Member pricing of $600 plus HST for CAs, CMAs and CGAs and $750 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 $2,000 plus HST for CAs, CMAs and CGAs and $2,300 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.
**NEW**

**The CEO Program: Leading with Purpose**  
PD14150281

Leaders today must know how to handle the complexity of unpredictable, volatile forces that will impact their business. These include changing priorities, counter intuitive imperatives and events largely beyond their control. Organizations are simply not built to innovate in an era characterized by decaying business models, transient competitive advantage, bad strategies and an unquestioning reliance on archaic management tools. The new world demands a different kind of leader – one who can initiate strategic conversations that question rather than reinforce the status quo.

Leading with purpose requires the ability to make tough but smart decisions, apply strategic intelligence and foresight, see the inevitable speed bumps and anticipate career derailers before they arrive, select talent and build a cohesive executive team, relate well with key stakeholders, deal with unexpected but high-impact surprises, articulate a vision that both informs and inspires, foster a culture of resilience and create business models that can compete for the future.

Beyond requisite skills, the responsibility of leadership demands that you deal with ethical dilemmas and avoid the allure of the slippery slope, nurture and lead people who are brighter than you, design and build healthy organizations, decide when “the game” must be retooled, overcome self-doubt and find the answers to the role-defining questions that will determine your destiny. When you possess this knowledge, you will have your own distinctive leadership identity.

Do you have the requisite emotional and mental competencies, interpersonal skills, street-smart insights, decision-making competencies and executive presence to lead others? Regardless of your ultimate pedestal in business, do you know what it really takes to lead others? If so, do you possess the inner moral compass and attributes to do it with conviction? Because the opportunities abound – organizations replace their CEOs every four years on average and over 40% (the unprepared) flame out within their first 18 months.

**WHO SHOULD ATTEND**  
This one-of-a-kind, proven program is designed for both current and aspiring CEOs or for those who simply want to excel with confidence and conviction in the upper echelons of executive responsibility.

**SESSION TOPICS INCLUDE**

- **The Opportunity and Gritty Realities of CEOdom** - The difference between the “good” and the “best.” What you must know to define your leadership identity. What will disqualify you (even before you begin).


- **The Ingredients of Leadership** - Realistic self-assessment: Could you pass the entrance exam? Executive presence and self-promotion. Reconciling the paradoxes of being the top dog. Acquiring/using power.

- **Perfecting the Critical Skills** - Building the team, developing action plans, nurturing key relationships. Leading high-impact performers. Ensuring a symbiotic board relationship. Misunderstood/misused leader tools.

- **The CEO as Chief Decision Maker** - Avoiding the echo chamber and making tough calls: What will make or break you. Dealing with experts. Building risk intelligence. Achieving competitive advantage

- **The Ultimate Responsibilities of Leadership** - Ethical dilemmas, succession planning, developing talent, sustaining excellence. Commandments for career CEOs. The defining questions. How to lead with purpose.

**THE PROGRAM**  
Highly practical, reflective of the latest research and interactive, emphasis is placed on participation and relevant case studies. The depth and breadth of participant experiences is one of the primary benefits of attending. You will receive a pre-course workbook with readings and diagnostic exercises to ensure a higher return on your investment. Testimonials from prior attendees available on request.

**FACULTY**  
This intensive, provocative, interactive and advanced program is the creation of Dr. Jim Murray who has successfully led large and small entities in the public and private sectors, has a remarkable track record of helping over 600 organizations achieve their potential, and has taught members of the accounting profession across the country since 1982. His students and clients have hailed him as a “man of brilliance,” a “rare breed” and an “organizational therapist.” You can read his full bio at www.SmartLeaders.ca.

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

**REGISTRATION**  
Complete a registration form and return to ICANS on or before October 1, 2014. Maximum registration is 20 participants.

**November 5-7, 2014, 8:15am-6:00pm**  
Location: TBD  
PD Hours 21
Accounting, Auditing and Professional Practice Update

Updated | 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 (Halifax)
David Baker, CPA, CA (Sydney)

ASPE: Accounting Update for Members In Industry

PD14150011 | Updated
Level: Intermediate

This course is designed to review recent revisions to the CPA Canada Handbook – Part II, Accounting Standards for Private Enterprises (ASPE). In addition providing an update, the course provides specific examples of the implementation of new and revised recommendations and practice guidance on other current and relevant matters. It outlines the implications of changes in other accounting frameworks such as IFRS and Accounting Standards for Not-for-Profit Organizations, in the context of their relationship to ASPE. It is suited to members who are involved in the preparation and analysis of financial statements for small and medium-sized entities.

WHO WILL BENEFIT
This course provides an overview of the current developments in ASPE. It is best suited to professional accountants in small and medium-sized businesses.

LEARNING OUTCOMES
At the end of the course participants will be:
• Aware of recent CPA Canada pronouncements in ASPE
• Able to identify the potential implications of the recent ASPE pronouncements
• Able to apply recent ASPE pronouncements in some situations

TOPICS INCLUDE
• Introduction and overview of new standards in ASPE
• Review of improvements to ASPE, including basis of conclusions
• Review of matters discussed by the Private Enterprise Advisory Committee
• Review of “trips and traps” in the application of ASPE
• Future developments in ASPE standards

NOTE
Those interested in changes to Part I (IFRS) of the CPA Canada Handbook should consider attending the IFRS - Update 2014 course (see page 21) and those interested in changes to Part III (Not-for-Profit Organizations) 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

December 16, 2014, 9am - 12pm
ICANS Learning Centre
½ Passport Learning Centre
3 PD Hours

For Course Fees, see Pricing Information.
ASPE: A Comparison to IFRS  
PD14150321 | Updated  
Level: Introductory

This course examines the major differences between accounting standards for private enterprises (ASPE) and publicly accountable enterprises (IFRS).

WHO WILL BENEFIT
Professional accountants who work in financial reporting and related areas of publicly accountable enterprises and private enterprises including CFO and VP, director and/or senior manager, controller and other financial reporting staff. Those who want to have a general understanding of the key differences to determine which set of standards would be most appropriate for an entity, and be able to explain the impact of differences on client’s financial statements and the implications of using IFRS compared to ASPE. Audit committee members may also find this to be a useful course. The course may be of particular interest to those in enterprises that are considering going public who need to consider the impact on their accounting policies.

In addition, individuals wanting a general understanding of the differences that would impact their interpretation of financial statements using IFRS compared to ASPE.

LEARNING OUTCOMES
Participants gain an understanding of:
• The major similarities and significant differences between the two sets of standards and how these differences impact financial statements. This will help them interpret and understand financial statements prepared using IFRS compared to ASPE.
• The impact of current developments and changes to standards in IFRS and how they will impact ASPE.
• The one-time considerations on transitioning between the two sets of standards

TOPICS INCLUDE
• Conceptual framework
• Fair value measurement
• Standards related to:
  • Financial statement presentation
  • Non-current, non-financial assets
  • Property, plant and equipment
  • Investment property
  • Agriculture
  • Intangible assets
  • Impairment
  • Borrowing costs
  • Assets held for sale
  • Financial instruments
  • Joint ventures
  • Investment
  • Other liabilities
  • Asset retirement obligations
• Provisions
• Contingencies
• Employee benefits
• Income taxes
• Leases
  • Revenue
  • Construction contracts
  • Other standards
  • Inventories
  • Subsequent events
  • Government grants
  • Foreign currency
  • Consolidated financial statements
  • Non-controlling interests
  • Investments
  • Related party transactions
  • Stock based compensation
  • First-time adoption

ASPE: A Survey of the Standards  
PD14150361 | Updated  
Level: Intermediate

This seminar is designed to review ASPE from cover to cover encompassing all the Handbook sections and guidelines and is aimed at individuals seeking a complete review of ASPE together with some not-for-profit impacts. The seminar will provide information about all of the standards that make up Part II of the Handbook with illustrative examples and exercises in certain measurement, recognition and disclosure areas. In addition, the course will identify and outline the accounting policy choices available to management in applying ASPE.

Examples and exercises will cover some of the newer or more common concepts of accounting used by private enterprises or areas where practice review has identified struggles or challenges. Some supplemental information to address ASPE application for not-for-profit organizations will be included at a high level.

SEMINAR OUTLINE
• Accounting standards framework and general standards
• Financial instruments
• Tangible assets
• Long-term assets
• Non-financial liabilities
• Shareholder equity
• Revenue and other expenses
• Other disclosures and other matters
• Sample financial statements and note disclosures

WHO WILL BENEFIT
Those seeking a robust and complete review of ASPE including individuals who have been detached from Canadian standards in recent years may find this course beneficial to regain a technical accounting base of standards to be used by private enterprises. Individuals involved in the not-for-profit sector may also find this course useful because of the ASPE measurement, recognition, presentation and disclosure requirements applicable to not-for-profit accounting and reporting.

PREREQUISITE
Familiarity with current accounting frameworks.

NOTES
The seminar and the materials provided do not review in depth the transition to ASPE or provide a comparison of the ASPE to the previous accounting standards or IFRS.

For e-learning session, see page 88

SEMINAR LEADER/S (see Instructor Bios)
Debi Peverill, CA

November 20-21, 2014, 9am - 5pm
WTCC
2 Passport Days | 14 PD Hours
ASPE: Disclosure & Presentation
- From Standards to Words
PD14150021 | Updated
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

ASPE in the Construction Industry
PD14150381 | New
Level: Intermediate
This course explores the ASPE standards that are applicable to the construction industry in a practical manner. For the purposes of this course, construction industry includes construction contractors with various activities. A contractor may engage in those activities as a general contractor or a subcontractor, and does not necessarily have ownership of real estate, but is acting as the vendor to builders, developers, and landlords that have direct or indirect ownership of the real estate. The course will also cover the disclosure requirements of ASPE and other issues specific to the construction contracts.

WHO WILL BENEFIT
• All professional accountants who work in or are interested in financial reporting and related areas of accounting in the construction industry
• Anyone involved in financial reporting and corporate accounting under ASPE including CFOs, VPs Finance, and Controllers
• Those in public accounting practice, including partners, managers, and seniors.

LEARNING OUTCOMES
At the end of this course participants will:
• Understand the key elements of ASPE as they apply to the construction industry
• Learn through lectures and practical application the specific scenarios that illustrate accounting treatment
• Leave this course with an understanding of industry practices and accounting policy selections

TOPICS INCLUDE
Areas covered in the context of the implications to construction entities:
• Revenue recognition
• Work in process
• Holdback receivable and payable
• Impairment
• Financial statement presentation

Specific standards covered in the context of the implications to construction entities:
• Section 1000, Financial Statement Concepts
• Section 1100, Generally accepted accounting principles
• Section 1510, Current Assets and Current Liabilities
• Section 3031, Inventories
• Section 3400, Revenue
• Section 3856, Financial Instruments

NOTE
For a more in-depth scope of real estate, participants may prefer to attend the course ASPE in the Real Estate Industry (see page 18).

SEMINAR LEADER/S (see Instructor Bios)
Katrina Beach, CA, CPA (IL)
Matthew Totten, CA

November 18, 2014, 9am - 5pm
WTCC
1 Passport Day | 7 PD Hours

November 19, 2014, 1pm - 4pm
WTCC
½ Passport Day | 3 PD Hours

For Course Fees, see Pricing Information.
ACCOUNTING

ASPE in the Real Estate Industry
PD14150351 | Updated
Level: Intermediate

This course explores the ASPE standards that are applicable to the real estate industry and makes a link to REALpac in a practical manner. For the purposes of this course, real estate industry will include real estate development and rental properties. This course will discuss accounting issues encountered by builders, developers, and landlords that have direct or indirect ownership of the real estate. It does not address accounting issues related to the general contractors or subcontractors who are involved in the construction. The course will also cover the disclosure requirements of ASPE and other issues specific to the real estate industry.

WHO WILL BENEFIT
• All professionals who work in/are interested in financial reporting and related areas of accounting in the real estate industry
• Anyone involved in financial reporting and corporate accounting under ASPE including CFOs, VPs Finance, and Controllers
• Those in public accounting practice, including partners, managers, and seniors.

LEARNING OUTCOMES
• Understand key elements of ASPE and make a link to REALpac
• Learn through lectures and practical application the specific scenarios that illustrate accounting treatment
• Leave this course with an understanding of industry practices and accounting policy selections

TOPICS INCLUDE
Areas covered in the context of the implications to real estate entities:
• Development and construction costs
• Rental properties (including its construction, purchase or sale)
• Revenue recognition
• Impairment
• Asset Retirement Obligations
• Joint-ventures

Specific standards covered in the context of the implications to real estate entities:
• Section 1000, Financial Statement Concepts
• Section 1100, Generally accepted accounting principles
• Section 1510, Current Assets and Current Liabilities
• Section 3031, Inventories
• Section 3055, Interest in Joint Ventures
• Section 3061, Property, Plant and Equipment
• Section 3063, Impairment of Long-Lived Assets
• Section 3064, Goodwill and Intangible Assets
• Section 3110, Asset Retirement Obligations
• Section 3400, Revenue
• Section 3475, Assets held for sale
• Section 3850, Interest Capitalized
• Section 3856, Financial Instruments

NOTE
Those interested in accounting issues related to the general contractors or subcontractors who are involved in the construction, may prefer to attend the course ASPE in the Construction Industry (see page 17).

SEMINAR LEADER/S (see Instructor Bios)
Katrina Beach, CA, CPA (IL)
Matthew Totten, CA

November 3, 2014, 9am - 5pm
ICANS Learning Centre
1 Passport Day | 7 PD Hours

ASPE Income Tax
PD14150391 | New
Level: Intermediate

OBJECTIVE
This half-day seminar reviews the accounting policy choices for accounting for income taxes under ASPE. To do this we review the application of the liability method under future income taxes including the identification of common temporary differences, the meaning of more likely than not, and accounting for outside basis differences. We also review the disclosures under the taxes payable method and the impact of refundable taxes.

WHO SHOULD ATTEND
This is an introductory level seminar or a refresher at the intermediary level on the choice between the taxes payable method and the future income tax method. It is designed for preparers of ASPE financial statements or practitioners auditing or reviewing ASPE financial statements.

BENEFITS OF ATTENDING
Participants will have an opportunity to apply the principles through exercises and review sample disclosures.

CONTENT
• Taxes payable method
• Future income taxes method
  • Identification and recognition of temporary differences
  • Measurement of future income taxes
  • Presentation (intra-period allocation, refundable taxes and offsetting)
  • Disclosure

The seminar will integrate lecture with exercises and group discussion.

SEMINAR LEADER/S (see Instructor Bios)
Kate Horne, CA

December 16, 2014, 1pm - 4pm
ICANS Learning Centre
½ Passport Day | 3 PD Hours
ASPE: Revenue Recognition  
PD14150371 | Updated  
Level: Intermediate  

OBJECTIVE  
For privately held enterprises in Canada, the available guidance for revenue recognition is more principles based than what it was just a few short years ago, has changed! This seminar will provide participants with practical guidance on how to work with CPA Handbook 3400 to analyze sales contracts in the new environment, a new world that is more principles based. It will help participants find and utilize guidance applicable to unique revenue recognition situations, and to identify and treat the separately identifiable components of multiple-element arrangements. The course will be of interest to practitioners it is intended to apply to a broad range of industries and those in public practice.

WHO SHOULD ATTEND  
CAs and other professional accountants who need to navigate complex issues around the recognition and measurement of revenue under ASPE.

BENEFITS OF ATTENDING  
Participants will learn to navigate available guidance on revenue recognition; understand which issues are likely to involve the most significant estimates or judgments; establish revenue policies where specific guidance does not exist; allocate contract revenues appropriately in multiple-element arrangements; understand when it may be appropriate to refer to other country GAAP for solutions under the Canadian GAAP hierarchy; and be aware of some of the most common problem areas and recent or pending developments.

CONTENT  
• detailed analysis of CPA Handbook 3400 Revenue;  
• discuss accounting for commonly encountered issues - delivery and substantial performance; deferred payments and effect of fair value measurement (discounted cash flow); multiple-element contracts; separately identifiable components of an arrangement; revenue with right of return; price protection; gross versus net reporting; sale and repurchase agreements; bill and hold sales; reimbursements of out-of-pocket expenses; non-refundable payments received in advance;  
• examples of financial statement presentation

SEMINAR LEADER/S (see Instructor Bios)  
Kim Day, CA

February 5, 2015, 9am - 12pm  
ICANS Learning Centre  
½ Passport Day | 3 PD Hours

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Financial Instruments for Private Enterprise (ASPE) and Not-for-Profit Organization (ASNPO)  
PD14150401 | Updated  
Level: Intermediate

This seminar provides information on private enterprises adoption of new standards beginning January 1, 2011, and not-for-profit organizations adoption of new standards January 1, 2012.

The entire focus will be on Section 3856, Financial Instruments. The Canadian Accounting Standards for Private Enterprises (ASPE) provide specific guidance for the recognition, measurement, presentation and disclosure of financial instruments. These requirements apply to all private enterprises preparing general purpose financial statements using ASPE. For non-government NFPOs, these same financial instrument standards will apply to organizations adopting Part III of the CPA Handbook – Accounting.

This seminar will explore the financial instrument standards from recognition to disclosure. The seminar uses two core examples determining the initial fair value, the initial presentation, the subsequent measurement and the disclosure in the financial statements. This course also examines those instruments required to be subsequently measured at fair value including disclosure of an investment portfolio.

SEMINAR OUTLINE  
• Initial recognition & presentation of financial instruments  
• Application of fair value and amortized cost methods  
• Measurement and disclosure of financial instruments in the annual financial statements  
• Identify optional presentation and disclosure methods  
• Valuation options and requirements for not-for-profit investment portfolios

WHO WILL BENEFIT  
Industry, organizations and public practitioners operating or volunteering in the private enterprise environment or not-for-profit environment.

PREREQUISITE  
Participants should have a good working knowledge of ASPE or have previously attended an ASPE seminar.

SEMINAR LEADER/S (see Instructor Bios)  
Debi Peverill, CA

January 15, 2015, 9am - 5pm  
ICANS Learning Centre  
1 Passport Day | 7 PD Hours

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For Course Fees, see Pricing Information.
ACCOUNTING

**IFRS: Fair Value Measurement**

PD14150411 | Updated
Level: Intermediate

**OBJECTIVE**

This seminar will provide participants with an intermediate-level understanding of where fair value is used in IFRS and how it is measured. It will also include coverage of IFRS 13, which is effective for annual periods beginning on or after January 1, 2013.

**WHO SHOULD ATTEND**

Accountants, management and financial professionals who are involved in the preparation, audit and use of financial statements under IFRS.

**BENEFITS OF ATTENDING**

IFRS introduces new concepts and broadens the applicability of fair value. This seminar assumes that most participants have a basic familiarity with standards relating to fair value accounting and assessment under IFRS, including IFRS 3 and 9 and IAS 16, 38, 40, 36 and 39. The seminar will teach, using examples, when and how to apply these standards. IFRS 13 on Fair Value Measurement will be reviewed in detail.

At the end of the seminar, participants should be able to determine when fair value measurement applies under IFRS, options available for measurement (if applicable) and how to account for fair value. They will have an understanding of the methodologies and standards applicable to fair value measurement and impairment testing, although not at a level of a valuation professional.

**CONTENT**

- intangible assets
- business combinations
- impairment of assets
- appendices touch on property, plant and equipment, investment property, financial instruments, related party transactions, share-based payments, oil and gas, employee benefits and the IFRS Work Plan
- public company examples of fair value disclosure are included

Participants should have a basic understanding of the IFRS standards incorporating fair value.

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

Trisha LeBlanc, CA, CPA (IL)

December 18, 2014, 9am - 5pm
ICANS Learning Centre
1 Passport Day | 7 PD Hours

**IFRS: Financial Statement and Note Disclosure**

PD14150421 | New
Level: Intermediate

This course provides participants with an overview of the standards related to the preparation of all the statements and related note disclosure with an emphasis on quality presentation and disclosure. The presentation material will concentrate on areas of presentation and disclosure that are new and/or difficult to implement.

**WHO WILL BENEFIT**

Professional accountants and other professionals involved in the preparation of IFRS financial statements for enterprises.

**LEARNING OUTCOMES**

At the end of this course participants will:

- Understand the standards related to financial statement presentation and note disclosure under IFRS that are new and/or complex.
- Have reviewed sample notes and statements to assist with application in their own work environment.
- Have worked on mini cases that assist with the understanding of how to implement the presentation and disclosure standards.

**TOPICS INCLUDE**

The course concentrates on new and difficult areas regarding:

- Presentation on all the financial statements; and note disclosures related to:
  - Business combinations; consolidations, subsequent events and investments
  - All assets
  - All liabilities.
  - Revenue and expenses
  - Other disclosures - related party transactions; government grants, agriculture, exploration, interim statements, and first time adoption; contingencies; commitments; subsequent events; going concern; economic dependence

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

Allan Jenkins, CA, CPA (IL)

November 20, 2014, 9am - 5pm
WTCC
1 Passport Day | 7 PD Hours
IFRS: Update 2014
PD14150431 | New
Level: Intermediate

IFRS standards continue to change and it is important to keep abreast of recent developments. This course provides participants with a review of new and revised IFRSs and an up-to-date snapshot of other projects being considered by IFRS standard setters. The content covers new and revised standards approved from July 2013 to June 2014. Updates are provided to summarize changes after June 2014.

WHO WILL BENEFIT
All professionals who want to be informed of the recent developments in IFRS standards, including: public accountants, preparers and readers of financial statements using IFRS. CFOs and VPs, Directors, Senior managers, Controllers and other financial reporting staff, auditors, and audit committee members will find this course useful.

LEARNING OUTCOMES
After completing this course, the participants will have an understanding of the IFRSs approved or revised during the past year and an overview of projects on the IASB’s agenda.

TOPICS INCLUDE
• Overview of IFRSs – issued, revised and in progress
• Review of new and revised standards
• Revenue
• Financial Instruments including Hedging, Classification and Measurement and Impairment
• Interim standard for rate-regulated entities
• Annual Improvements
• Other
• Review of feedback from regulators
• Review of Exposure Drafts and Other Projects in Progress – IASB’s work plan including Leases

NOTES
This is an “Update” course and will update the understanding of the existing body of IFRS knowledge. It is not an Introductory or Comparison course, these subjects are offered in the “Interactive On-line seminar” IFRS – A Survey of Standards course (see page 88).

SEMINAR LEADER/S (see Instructor Bios)
Kate Horne, CA

November 19, 2014, 9am - 12pm
WTCC
½ Passport Day | 3 PD Hours

AUDIOWEB PRESENTATION OF IFRS UPDATE 2014
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. This title is 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 receive a confirmation email as 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. After you have finished with the audio, you can return to the webpage and complete the quiz.

DL14150061 Available November 10, 2014 to February 28
½ Passport Day | 3.5 PD Hours | Price: $110

Formerly: NFPO - Accounting Standards
PD14150441 | Updated
Level: Intermediate

This course provides an overview of the accounting standards for non-government controlled not-for-profit organizations (NFPOs) under Part III of the CPA Canada Handbook. It reviews the application of GAAP with an emphasis on the areas where choices have to be made in the preparation of financial statements. It should be noted that a NFPO can also elect to apply Part I, IFRS. This course will not discuss this option in detail.

Part III of the CPA Canada Handbook provides the standards that are unique to non-government private not-for-profit organizations. In addition, the underlying premise is that there should be no differences in accounting between profit-oriented enterprises and not-for-profit organizations when the circumstances and transactions are the same, (other than for matters included in Part III), therefore, NFPOs are also directed to Part II of the CPA Canada Handbook, Accounting Standards for Private Enterprises (ASPE). As a result this course will also review some of the more relevant accounting standards under ASPE.

LEARNING OUTCOMES
• Understand the accounting choices and issues that are related and specific to NFPOs
• Review the implications of more complex accounting standards (e.g. financial instruments)

TOPICS INCLUDE
• Recently revised standards and status on projects
• Review of Part II of CPA Canada Handbook (ASPE) as it relates to NFPOs
• Accounting for financial instruments under Part II, Section 3856
• Financial statement presentation – a review of the accounting choices that must be made in the preparation of financial statements for not-for profit organizations
• Accounting for contributions and contribution receivables
• Accounting for tangible and intangible capital assets, and collections
• Accounting and disclosures related to controlled and related entities
• Other matters and disclosures – use of a disclosure checklist

NOTES
Those involved in larger NFPOs may prefer to attend the full-day course: Not-for-Profit Organizations & Registered Charities – Accounting, Auditing & Taxation Issues (see page 22).

SEMINAR LEADER/S (see Instructor Bios)
Tammy Crowell, CA, MBA

January 16, 2015, 9am - 5pm
ICANS Learning Centre
1 Passport Day | 7 PD Hours

For Course Fees, see Pricing Information.
NFPO: Financial Statement & Note Disclosure (Non-Government Controlled Not-For-Profit Org)
Formerly: Non-Government Controlled Financial Statement Presentation & Note Disclosure
PD14150071 | Updated
Level: Intermediate

This course provides participants with a summary of the standards related to the preparation of all the statements and related note disclosure, along with examples to assist in the preparation of the financial statements for non-government controlled Not-for-Profit Organizations (NFPOs). Government-controlled NFPOs must follow the Public Sector Accounting Handbook, which will not be addressed in this course.

WHO WILL BENEFIT
Members and other professionals involved in the preparation of NFPO financial statements.

LEARNING OUTCOMES
At the end of this course participants should be able to:
• Understand financial statement presentation and note disclosure requirements under Part III of the CPA Canada Handbook for NFPOs, and relevant disclosures from Part III Accounting Standards for Private Enterprises (ASPE)
• Develop presentation guidelines for their own financial statements, statement of financial position, statement of operations, statement of changes in net assets, and statement of cash flows
• Develop the note disclosure by major financial statement area (e.g., PPE, liabilities, allocation of expenses, and others such as, contingencies, commitments, subsequent events, related party transactions, etc.)

TOPICS INCLUDE
• The concepts that drive the presentation and disclosure requirements
• The accounting choices that must be made in the preparation of financial statements for not-for-profit organizations under the deferral method and the restricted fund method
• Statement of Operations presentation and related disclosures
• Statement of Financial Position presentation and related disclosures, i.e., financial instruments
• Statement of Changes in Net Assets
• Statement of Cash Flow presentation and related disclosures, i.e., cash equivalents
• Other Disclosures: related party transactions; contingencies; commitments; subsequent events; going concern; economic interest, etc.
• Discussion of ongoing projects and potential impact of changes

NOTES
Participants should have knowledge of Part III of the CPA Canada Handbook, with respect to measurement issues or completion of the course Not-for-Profit Organizations – A Survey of Standards Under Part III of the Handbook (see page 21).
Those involved in larger NFPOs may prefer to attend the full-day, Not-for-Profit Organizations & Registered Charities – Accounting, Auditing & Taxation Issues course (see page 22).

SEMINAR LEADER/S (see Instructor Bios)
Kristina King, CA

NFPOs & Registered Charities - Accounting, Auditing & Taxation Issues
PD14150081 | Updated
Level: Introductory to Intermediate

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

WHO SHOULD ATTEND
Members in the NPO sector and practitioners who audit or provide advice to registered charities or NPO entities. It is not appropriate for those specifically involved with government not-for-profits adopting standards prescribed by the Public Sector Accounting Board without the PS4200 series. Those who are responsible for preparing, analyzing, or auditing financial statements from smaller NPOs, and/or those interested in a review of current standards under Part V of the CPA Handbook, may prefer to attend NFPO – A Survey of the Standards under Part III of the Handbook.

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

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

SEMINAR LEADER/S (see Instructor Bios)
Gerry Lacroix, CA

October 30, 2014, 9am - 5pm
ICANS Learning Centre
1 Passport Day | 7 PD Hours
Audit of Small Entity
Formerly: Micro Audit
Updated | Level: Intermediate

This course is directed to professionals who wish to enhance their skills in auditing small entities effectively and efficiently by focusing on the key CASs that are most relevant to small entities. By understanding these sections the professionals performing the engagement will be able to use the CAS objectives and requirements to drive the audit approach of profit and not for profit small entities in a cost effective manner.

WHO WILL BENEFIT
Professionals performing small audit engagements

LEARNING OUTCOMES
• The course will help professionals:
  • Have an in depth understanding of key CASs most relevant to auditing small entities
  • Be able to access and use the CASs in designing the audit
  • Know when and how to use memos to reduce unnecessary documentation.
  • Designing practical approaches to risk assessment procedures.
  • Design practical audit approaches to reducing risk
  • Have a better understanding how to lower the cost of the audit while complying with CAS standards.

TOPICS INCLUDE
Risk assessment:
• Understanding CAS 315 “Identifying and Assessing the Risks of Material Misstatement through Understanding the Entity and Its Environment” and how to use it when performing risk assessment procedures for a small entity.
• Practical risk assessment procedures for a small entity
• Use of analytics as a risk assessment procedure
• How to document the risk assessment procedures performed
• Summarizing results and documenting conclusions

Risk response and reporting:
• Understanding CAS 330 “The Auditor’s Responses to Assessed Risks “ and how to use it in responding to risk in a small entity
• Customizing audit procedures and forms to address risk
• Understanding what further audit procedures to perform
• The use of tests of detail
• Analytical audit procedures as a substantive risk response
• When and how to use test of controls as a risk response in a small entity
• Extent of testing considerations
• How to sample and when to sample in the audit of a small entity
• Forming/documenting judgments and conclusions
• Communicating audit findings

Other
• Understanding CAS 320 “Materiality in planning and performing an audit” and the particular issues of determining and using materiality for a small entity.
• Identification of unnecessary documentation.
• Know which C•PEM forms will most likely be needed in the audit
• Using C•PEM forms as a resource rather than documentation

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

PD14150541 December 1, 2014, 9am - 5pm
ICANS Learning Centre
1 Passport Day | 7 PD Hours

Auditing Refresher
Formerly: Auditing in the New CAS Environment
PD14150451 | Updated
Level: Introductory

This course will provide participants with a solid foundation in the practical application of the Canadian Auditing Standards (CAS) to auditing engagements.

Through a case study approach, participants are given an opportunity to build on their understanding of the standards, and to practise applying the standards to a set of client-specific facts. The case study is based on the audit of a moderately complex “for-profit” private company.

WHO WILL BENEFIT
This course is recommended for audit practitioners at all levels of experience to refresh their understanding of auditing in the CAS environment. It will also be beneficial to any individuals who want to understand the CAS for other purposes.

LEARNING OUTCOMES
Participants will be able to:
• Understand the CASs
• Apply the CASs in a case study
• Identify the key elements of an engagement working paper file

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

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

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

For Course Fees, see Pricing Information.
ASSURANCE

Best Practice in Practice Management
PD14150461  |  Reoffering
Level: Intermediate

This course is designed to enhance the skills of experienced practitioners in the development and management of their practices. Through a combination of lecturing and class discussions, you will learn to do a SWOT analysis, review your relationships with your clients, establish a plan to maintain your technical skills, and review the efficiency of your practice.

WHO WILL BENEFIT
Practitioners in small or medium-sized practices.

LEARNING OUTCOMES
• Practical knowledge to strengthen a practitioner’s performance in running a small practice
• Discussion of all aspects of practice with colleagues and learn from their successes

TOPICS INCLUDE
• SWOT analysis
• Personal attributes for success
• Client relationship management
• Marketing and development of your practice
• Practice efficiency and profitability
• Staff development and motivation

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

February 2, 2015, 9am - 5pm
ICANS Learning Centre
1 Passport Day  |  7 PD Hours

Compilation Engagements
PD14150471  |  Updated
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

November 19, 2014, 9am - 12pm
WTCC
½ Passport Day  |  3 PD Hours
ASSURANCE

Effective Audit Documentation using C-PEM
Formerly: Preparing Working Papers for a Small Bus Audit using C-PEM
PD14150481 | Updated
Level: Intermediate

Documentation not only provides the evidence that the audit was planned and performed in accordance with CASs but also the thought process involved in reaching the conclusions.
This course will help auditors to understand the documentation requirements and then comply in an efficient and cost effective manner. Learn how to effectively use the key CPEM forms including updating forms in subsequent years, what CPEM forms can be safely ignored and how to prepare structured memos (instead of some CPEM forms) that meet CAS requirements.

SEMINAR OUTLINE
• The major steps involved in an audit and related documentation requirements
• How to complete key CPEM forms and prepare structured memos
• Application of CPEM forms to mini case study scenarios
• Examples of completed documentation
• Evaluating the sufficiency of evidence obtained
• Communicating audit findings and control deficiencies
• Common documentation deficiencies
• How to modify the auditor’s report

WHO WILL BENEFIT
Professional personnel performing audit engagements

NOTES
Course registrants who do not have access to the Canadian Professional Engagement Manual (C•PEM) may take advantage of a special 50% discount on the initial one-year subscription, reducing the cost to $160 for print or electronic versions. To take advantage of this special offer, visit CAstore.ca/picapem and enter coupon code COUP2234 at the checkout.

This discount applies to the C-PEM member product only (Internet, DVD, Download or print formats). It cannot be applied to C-PEM combo products.

SEMINAR LEADER/S (see Instructor Bios)
Wanda Leese, CA
Chris MacPhee, CA

November 26, 2014, 9am - 5pm
ICANS Learning Centre
1 Passport Day | 7 PD Hours

Effective Use of Analytical Procedures
PD14150491 | New
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
Chris Trenaman, CA

December 19, 2014, 9am - 12pm
ICANS Learning Centre
½ Passport Day | 3 PD Hours

For Course Fees, see Pricing Information.
Efficient & Effective Review of Working Paper Files - Audit, Review & Compilation Engagements
Formerly: File Review Methodologies
PD141S0501 | Updated
Level: Intermediate

This course develops a process for performing and documenting a review of a working paper files for various engagements and review levels.

WHO WILL BENEFIT
The course is directed to professionals just starting to review the working papers of audits, reviews and compilation engagements. It will also benefit individuals with experience in reviewing working paper files wishing to improve their review skills.

LEARNING OUTCOMES
Participants will be able to understand:
• The relationship between the review process and the requirements for engagement file reviews under the Canadian Auditing Standards (CAS) and Other Canadian Standards
• The different approaches needed in the various review roles resulting from the CSQC 1 quality control requirements
• How to follow an organized structure when reviewing working paper files
• Specific file review problem areas
• The most common file deficiencies to be found
• Requirements of CAS 230 audit documentation
• Other CAS sections that have documentation requirements.

TOPICS INCLUDE
• Why review working paper files
• Detailed outline of file review requirements under the CAS
• When to review working papers
• Some useful techniques to use when reviewing working papers.
• Discussion of review problems encountered in practice
• How reviews are different for various levels of assurance
• How reviews differ when no assurance is given (Compilations)
• Comparison of file review requirements for various review situations (i.e. detailed vs. general reviews)
• File review notes – how to prepare and present them to file preparers
• Provincial inspection reports as a tool for file review.
• Review of a file for file efficiency purposes.
• How to review some key C+PEM forms
• Case study in file review
• The use of checklists when reviewing

February 16, 2015, 9am - 5pm
ICANS Learning Centre
1 Passport Day | 7 PD Hours

External Audit: Understanding & Testing Controls for Small to Mid-Sized Entities
PD141S0511 | New
Level: Intermediate to Advanced

Auditors often find it challenging to obtain a sufficient understanding of a client’s system of internal control to meet the requirements of the Canadian Auditing Standards (CAS).

This session will identify the common trouble spots as identified by practice inspection, regulators and personal experience, and provide practical tips and techniques for improving how to obtain an understanding of internal controls sufficient to satisfy CAS requirements. Using a case study scenario, the course will also illustrate the benefits of using a top-down approach to understanding internal control.

Learn how to determine if testing controls would be cost-effective in audits, and for cases where that approach is selected, learn how to do so in a manner that would allow the auditor to appropriately reduce the amount of substantive testing performed.

LEARNING OBJECTIVES
• Examine common internal control trouble spots during an audit
• Revisit the Canadian Auditing Standards (CASs) requirements specific to internal controls
• Understand how to use a “top down approach” to internal controls
• Share efficiency and effectiveness tips in understanding and documenting entity and activity level controls
• Examine when it would be cost effective to test internal controls
• Discuss rotational testing approaches for obtaining control assurance

SPEAKER
Neverest is a leading provider of professional development training for professional accountants and auditors. All training programs are led by experienced instructors and are designed to improve performance at individual and team levels. Courses are conducted in an interactive format involving discussions, case studies, and group exercises. Since 2007, Neverest has provided training for professional institutes, corporations, the public sector and public accounting firms, in the areas of accounting & finance, risk management, internal audit, external audit and related professional soft skills.

SEMINAR LEADER/S (see Instructor Bios)
Laura Simeoni, CPA, CA, CIA

February 17, 2015, 9am - 5pm
ICANS Learning Centre
1 Passport Day | 7 PD Hours
**Fraud Happens! What to Do When You Suspect Fraud**

**PD14150531 | Updated**

**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

**November 13, 2014, 9am - 5pm**

ICANS Learning Centre

1 Passport Day | 7 PD Hours

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**Review Engagements**

**PD14150551 | New**

**Level: Intermediate**

This course provides practitioners with a refreshed skill set for completing review engagements. Interaction is an important aspect of this course and participants are encouraged to bring challenging questions for discussion. It is not about completing checklists, but rather the extensive judgment required to complete a review. Sample documentation is included for many issues. Case studies are reviewed to illustrate the material and provide practical guidance.

**WHO WILL BENEFIT**

Experienced practitioners who want a refresher on the practical issues of review engagement assignments including a review of the current standards and some best practices.

**LEARNING OUTCOMES**

Participants will have a better understanding of:

- What is required under professional standards for a Review Engagement.
- The risks associated with the engagement.
- Where some efficiencies may be gained in file preparation.
- Preparing for upcoming review engagements.

**TOPICS INCLUDE**

- A practical refresher on the application of the review engagement standards (CPA Handbook Sections 8100, 8200).
- Integration of the standard CSQC-1 “Quality Control for Firms that Perform Audits and Reviews of Financial Statements and other Assurance Engagements” and how it affects review engagements.
- A refresher on the acquisition and documentation of knowledge of the entity’s business and industry.
- Maximizing the use of understanding the entity’s business and industry during the planning stage of a review engagement.
- Integrating this understanding with decisions on how to complete the review.
- Relationship of “risk” to “work performed” in a review engagement.
- Emphasis on high-risk areas.
- Communicating expectations to professional staff.
- Completion of a review engagement.
- Samples of documentation to be included in a review engagement working paper file.
- Case studies illustrating the more difficult issues and their resolution.
- Common concerns raised by Practice Review/Inspection Departments pertaining to review engagements.
- Discussion on how AuG 20 can assist the practitioner in determining the procedures to be performed.
- Exploration of techniques to ensure an effective, yet efficient, engagement is achieved.
- Discussion of how CAS may impact review engagements.
- A review of frequently asked questions.
- A review of the current Exposure Draft on Review Engagements and how it may affect these engagements in the future.

**NOTES**

This course is not intended to be taken every year but rather a “refresher” every three or four years.

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

David Baker, CPA, CA

**December 2, 2014, 9am - 5pm**

ICANS Learning Centre

1 Passport Day | 7 PD Hours

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For Course Fees, see Pricing Information.
Risk & Control Workshop for Not For Profit Organizations
PD14150521 | New
Level: Intermediate to Advanced

A solid understanding of risk and control concepts is particularly important for those working in not-for-profit organizations (NFPOs). Risks can harm NFPOs, or risks can produce opportunities from which these organizations can benefit. The challenge for management is to recognize and assess these risks, and ensure that a suitable system of internal control is in place to mitigate the risks appropriately within the NFPO’s overall risk environment.

Using a not for profit case study scenario, this seminar will explain how to define, identify and assess potential risks specific to not-for-profit organizations. It also defines, and explores different types of control. It explains the new COSO Internal Control Framework and demonstrates how the Framework can assist in identifying controls to mitigate risks appropriately in computerized and non-computerized environments.

LEARNING OBJECTIVES
• Define, identify and assess risks affecting not-for-profit organizations.
• Identify existing internal controls and any control deficiencies.
• Design an effective internal control system to reduce inherent risk to a low level for a not-for-profit organization.

SPEAKER
Neverest is a leading provider of professional development training for professional accountants and auditors. All training programs are led by experienced instructors and are designed to improve performance at individual and team levels. Courses are conducted in an interactive format involving discussions, case studies, and group exercises. Since 2007, Neverest has provided training for professional institutes, corporations, the public sector and public accounting firms, in the areas of accounting & finance, risk management, internal audit, external audit and related professional soft skills.

SEMINAR LEADER/S (see Instructor Bios)
Laura Simeoni, CPA, CA, CIA

February 18, 2015, 9am - 5pm
ICANS Learning Centre
1 Passport Day | 7 PD Hours
**Breaking Up is Hard to Do**

**PD14150561 | New**

**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

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**Business Valuations - Advanced Issues**

**PD14150571 | Updated**

**Level: Advanced**

Building on the concepts of “Business Valuations: Introduction”, this seminar gives participants a more detailed insight into some of the more complex issues associated with business valuations. Participants are introduced to topics such as valuation discounts, valuing intangible assets, and valuing securities other than common shares.

**After this seminar, participants will be able to:**
- Evaluate a Discounted Cash Flow (DCF) valuation and assess the reasonableness of cost of capital, cash flow, and residual value assumptions
- Identify common errors and pitfalls associated with the business valuation process
- Evaluate the impact of buyer intent on the valuation process including assessing the value of potential cost and revenue synergies
- Apply various valuation discounts where appropriate
- Explain the best practice approach to valuing intangible assets
- Understand how to value securities other than common shares such as preferred shares and convertibles

**SEMINAR OUTLINE**
- Complexities associated with DCF valuation methods
- Valuation and buyer intent – strategic buyers versus financial buyers
- Identifying and valuing synergies
- Valuation discounts – minority interest, marketability, key person
- Valuing intangible assets
- Valuing preferred shares, convertibles securities and stock options

**WHO WILL BENEFIT**
Those in industry and practitioners who are seeking a deeper understanding of some of the more complex issues surrounding business valuation.

**PREREQUISITE**
Business Valuations: Introduction.

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

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December 19, 2014, 1pm - 4:30pm
ICANS Learning Centre
½ Passport Day | 3 PD Hours

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

Business Valuations - Introduction
PD14150092 | Updated
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

November 17, 2014, 9am - 5pm
WTCC
1 Passport Day | 7 PD Hours

Controllership - A Partner for Business
PD14150581 | Updated
Level: Intermediate

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

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

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

WHO WILL BENEFIT
Finance professionals working towards a Controller position, who are new to the position of Controller, or long-time Controllers looking for new tools/ideas on leadership.

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

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

February 9-10, 2015, 9am - 5pm
ICANS Learning Centre
2 Passport Days | 14 PD Hours
**Corporate Treasury Management**  
PD14150591 | Updated  
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  

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

February 11, 2015, 9am - 5pm  
ICANS Learning Centre  
1 Passport Day | 7 PD Hours  

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**Due Diligence for Acquisitions**  
PD14150601 | Updated  
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  

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

November 24, 2014, 9am - 5pm  
ICANS Learning Centre  
1 Passport Day | 7 PD Hours
FINANCE

**Financing Strategies**
*Updated 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

**Improving Financial Performance for Controllers and CFOs**
*PD14150611 | New Level: Intermediate*

**OVERVIEW**
- There is more and more pressure to do things better, smarter, and cheaper. This course will help the finance professional improve financial performance:
- Deal with short-term issues such as reducing expenses and increasing cash flows
- Change internal procedures and processes to help the business prosper
- Understand the changing business environment to be prepared for the future

This fast-paced one-day seminar combines lectures and problem-solving workshops. You will be exposed to novel ideas, hone your analytical skills, and be able to develop practical solutions for your organization.

**TOPICS INCLUDE**
1. Setting the stage
   - What is different now?
   - Financial and economic models
   - Behavioral finance
2. Profit improvement
   - Cash management
   - Expenses and soft costs
   - Banking and bankers
   - Managing receivables and payables
   - Capital expenditures
3. Process improvement
   - Finance and accounting: function and reporting
   - Internal control and risk management
   - Practical approach to enterprise risk management
   - Management tools
   - Reinvigorating the strategic process
4. Conclusion - ideas to follow up

**WHO WILL BENEFIT**
Financial directors, managers, controllers and CFOs, who want to help their organization survive and prosper, and accountants and consultants who advise clients.

**SEMINAR LEADER/S** (see Instructor Bios)
Jeffrey Sherman, BComm., MBA, FCSI, FCPA, FCA

March 9, 2015, 9am - 5pm
ICANS Learning Centre
1 Passport Day | 7 PD Hours
Management Accounting Refresher  
**PD14150621 | Updated**  
**Level:** Introductory  
The objective of this course is to provide participants with an overview of key concepts and decisions in management accounting.

**WHO WILL BENEFIT**  
This course will benefit individuals interested in a refresher of key concepts and decisions using management accounting information.

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

**TOPICS INCLUDE**  
- Different types of costs and cost behavior  
- Job order and activity based costing  
- Cost volume profit (CVP) analysis  
- Budgeting  
- Decision making using management accounting information (e.g. make or buy, add or drop, scare resource allocation)  
- Transfer pricing  
- Performance management (e.g. the Balanced Scorecard)

**NOTE**  
Please bring a calculator to the course to ease ability to participate in course activities.

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

November 12, 2014, 9am - 5pm  
ICANS Learning Centre  
1 Passport Day | 7 PD Hours

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Principles & Practices of Business Acquisitions  
**PD14150631 | Updated**  
**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

November 25, 2014, 9am - 5pm  
ICANS Learning Centre  
1 Passport Day | 7 PD Hours
Strategy and Risk Management for Financial Managers
PD14150641 | New
Level: Intermediate

OVERVIEW
Successful financial managers must thoroughly understand governance and strategy, and how to relate it to their reporting and control responsibilities, as well as how to add value to the strategic process. Risk management is a critical element of planning, and internal control provides the foundation of risk management.

You may already be involved in the strategy-setting process in your own organization, or perhaps you want to get more involved in value-added planning issues. This one-day seminar combines lectures and workshops using a comprehensive case study. You will be exposed to some novel approaches and ideas, hone your analytical skills, and be able to develop practical solutions for your organization.

COURSE OUTLINE
1. Role of the finance department
2. Strategy and corporate governance
3. Internal control: using the frameworks
4. Risk management and planning
5. Implementing change and concluding thoughts

WHO WILL BENEFIT
CAs in industry, including finance directors, managers and controllers, who want to help their organization survive and prosper, and CAs who advise clients.

SEMINAR LEADER/S (see Instructor Bios)
Jeffrey Sherman, BComm., MBA, FCSI, FCPA, FCA

March 10, 2015, 9am - 5pm
ICANS Learning Centre
1 Passport Day  |  7 PD Hours
**Advanced CaseWare & CaseView**  
**PD14150661 | New**  
**Level:** Intermediate  
This half full day session will focus on refining the use of Caseware and Caseview through the discussion of various features and options available to enhance file quality and productivity. The session is appropriate for various experience levels, however the session is targeted towards the experienced user.

**PREREQUISITES**  
One or more years’ experience with Caseware and Caseview

**LEARNING OBJECTIVES**  
- Understanding advanced features of Caseware's working trial balance, documents and functionality  
- Understanding of the more sophisticated features within CaseView to develop automated letters, reports and financial statements.

**TOPICS COVERED INCLUDE**  
**CaseWare**  
- Creating files from client data and templates, import and export information  
- Program options  
- File documentation, printing and year end roll forward  
- Advanced document settings and customization  
- Analytical review using account and variance analysis  
- History and milestones  
- Issue management, settings and customization  
- File maintenance and completion  
**CaseView**  
- Paragraph and section skipping, check boxes and popup cells (with choices)  
- Table formatting and options, cell roll forward & events  
- Cell calculations, linking to working paper data, drill-downs to working paper data  
- Notes to financials - best practices, insert and update knowledge library links  
- Issue management and viewer  
- Printing and exporting reports  
**Templates**  
- Implementation and maintenance  
**CaseWare Add-ons**  
- GAAP and IFRS Financials templates  
- Audit and Review templates  
- Connector

**SEMINAR LEADER/S (see Instructor Bios)**  
Terry Isles, FCGA

February 13, 2015, 9am - 12pm  
ICANS Learning Centre  
½ Passport Day | 3 PD Hours

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**Basics of CaseWare & CaseView**  
**PD14150651 | New**  
**Level:** Intermediate  
This half full day session is designed to show participants the basics of Caseware and Caseview. The session is divided between CaseWare and CaseView topics with time allotted for general discussions and questions. The session is appropriate for various experience levels, however the session is targeted towards the new and less experienced user.

**LEARNING OBJECTIVES**  
- Understanding of Caseware’s working trial balance, documents and functionality  
- Understanding of CaseView’s report writing functionality and features

**TOPICS COVERED INCLUDE**  
**CaseWare**  
- Creating new files from client data and templates, lead sheet and grouping options  
- Import and export information  
- Program options – setup  
- File documentation, printing and year end roll forward  
- Basic understanding of history and milestones, issues  
- Optional automatic document properties and reports  
- File maintenance and completion  
**CaseView**  
- Basic understanding of paragraph and section skipping  
- Table formatting and options, cell roll forward & events  
- Cell calculations, linking to working paper data, notes to financials  
- Issue management and viewer  
- Printing and exporting reports  
**CaseWare Add-ons**  
- GAAP and IFRS Financials templates  
- Audit and Review templates  
- Connector

**SEMINAR LEADER/S (see Instructor Bios)**  
Terry Isles, FCGA

November 21, 2014, 9am - 12pm  
WTCC  
½ Passport Day | 3 PD Hours
Excel Advanced
PD14150671 | 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, 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

November 19, 2014, 9am - 5pm
WTCC
1 Passport Day | 7 PD Hours

Excel Boot Camp - Intensive Excel Training
PD14150691 | New
Level: Intermediate

If you are ready for two days of intensive Excel training in a “laptop optional, laptop friendly” environment, then this course is for you. By using accounting-centric examples, developed for accountants, by accountants, Excel Boot Camp takes you through Excel from A to Z and shows you how to elevate your use of Excel to the next level.

Microsoft improved Excel significantly in versions 2007, 2010 and 2013. Additions to the function library, Tables, a greatly improved charting engine, and an overhaul of PivotTable functionality are just a few of changes you will learn about in Excel Boot Camp. In addition, throughout the two-day Excel Boot Camp, you and your team will learn various techniques for enhancing not only your efficiency, but also your effectiveness, when working with Excel. In this seminar, you will learn a wide variety of “power features” that will assist you in creating accurate spreadsheets in a fraction of the time previously required.

LEARNING OBJECTIVES
• Implement various tips, tricks, and techniques in Excel to address issues such as formatting, AutoCorrect, handling dates and times, and selecting cells with special characteristics
• Utilize Excel’s formula-building tools
• Describe how and when Excel’s Table feature should be used
• Create and audit complex formulas, including those containing arrays and SUMIFS, VLOOKUP, HLOOKUP, INDEX, and MATCH functions
• List and describe various techniques for securing Excel workbooks
• Create charts in Excel that captivate audiences and communicate messages effectively
• List and describe the six components of PivotTables and explain how to create simple PivotTables
• Create PivotTables, including PivotTables that perform calculations other than the predefined eleven calculations available
• Use the Camera function to assist in creating custom reports
• Utilize Excel’s Macro Recorder tool to create simple, yet very useful, macros that you can put to work right away

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
Fundamental knowledge of Excel 2007 or higher

DESIGNED FOR
Accountants who work with Excel and who want to learn all of the best features

WHO SHOULD ATTEND
Users of Excel 2007 or higher

NOTE
This course will be taught in Excel 2013. Reference will be made to the differences between Excel 2013 and Excel 2010 and 2007.

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

November 17-18, 2014, 9am - 5pm
WTCC
2 Passport Days | 14 PD Hours
Excel Tips, Tricks & Techniques for Accountants
PD14150681 | New Level: Intermediate

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

LEARNING OBJECTIVES
• Identify tips and tricks in Excel such as Freeze Panes, Split Windows, Selecting Cells with Special Characteristics, Using AutoCorrect, Adding Date and Time Stamps, Working with the Office Clipboard, and Paste Special and describe how to use each to increase productivity with Excel
• Describe tools and techniques for formatting in Excel, including Multiline Column Headings, The Accounting Format, Custom Date and Number Formats, The Hidden Format, and Conditional Formatting
• Identify opportunities to customize Excel and describe procedures for Customizing the Ribbon, Customizing the Quick Access Toolbar, Adjusting Excel’s Options, Using Templates to Increase Productivity, Modifying Excel’s Global Templates, and Working with Custom Themes
• Describe Excel’s formula building tools, including Absolute vs. Relative Cell References, The Formula Bar, The Formula Tab, Performing Calculations on Dates, Splitting and Combining Text Strings, Using the Text to Columns Wizard, Working with Defined Names, Conditional Calculations, VLOOKUPs and HLOOKUPs
• Describe how to link data from multiple Excel workbooks, including Creating Links, Updating Links, Managing Links, Handling Broken Links, Combining Single-Sheet Workbooks, Creating Sum-through Formulas & Rolling Reports
• Define the process for printing data from Excel, including describing How to Adjust Various Print Settings, Using the Camera Feature to Create Report Forms, and Working with Custom Views to Automate Print Settings to Print Reports

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 above.

PREREQUISITES
Fundamental knowledge of Excel operations

WHO SHOULD ATTEND

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

November 21, 2014, 9am - 5pm
WTCC
1 Passport Day | 7 PD Hours

iPad - An Effective Business Tool
PD14150122 | 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 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

November 20, 2014, 9am - 12pm
WTCC
½ Passport Day | 3 PD Hours
Technology for Accountants - Don't Get Left Behind
PD14IS0132 | 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

November 20, 2014, 1pm - 4pm
WTCC
½ Passport Day | 3 PD Hours

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.

c tc 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.
Building Enterprise Performance Dashboards
PD14150711 | New
Level: Introductory

Changes in the competitive landscape have resulted in increased focus on enterprise performance by senior management and stakeholders. Empirical evidence indicates that successful enterprises are fact-based and make decisions based on right information at the right time to the right decision maker.

While financial metrics still dominate dashboards, increasing focus has been placed identifying metrics that go beyond the general ledger. This multi-dimensional view of the enterprise with both leading and lagging Key Performance Indices (KPIs) has led many leading organizations to design actionable performance measurement and management frameworks to run their business.

WHO WILL BENEFIT
Senior and mid-level accountants in industry who are tasked with measuring and improving the performance of their organization. This program is designed for participants from the private sector for-profit companies. However, it still may be of interest to members of the public or not-for-profit sector who are looking for private sector best practices to guide their organizations.

LEARNING OUTCOMES
By participating in this seminar, you gain insights into the usefulness of well-designed dashboards and scorecards for corporations as well as for business units. Through real examples, cases and hands-on work, you get an increased appreciation of the importance of these scorecards in improving performance and helping your company exceed performance expectations.

TOPICS INCLUDE
• The performance challenge of the enterprise
• Designing an enterprise dashboard
• Designing domain specific dashboards
• Role of financial and non-financial metrics – beyond the obvious
• BSC and logic models
• Leading and lagging indicators
• Designing a dashboard – hands-on case
• Dashboards and software
• Real life examples of dashboards – what can we learn from them
• An implementation checklist and best practice

SEMINAR LEADER/S (see Instructor Bios)
Vijay Jog, Ph.D.

December 4, 2014, 9am - 5pm
ICANS Learning Centre
1 Passport Day | 7 PD Hours

Effective Financial Analysis for Medium/Large Business
PD14150701 | New
Level: Intermediate

In today’s fast-paced world, the effectiveness of business decisions and analysis made by senior executives depends directly upon their understanding of the financial impact of their decisions and linkage between firm strategy and financial planning. More than ever, senior management is looking for insights and for a well-functioning finance organization that is acting as a business partner.

This course covers a wide range of topics that aim to make the finance organization a business partner and an active member of the firm’s delivery model of its strategic intent. It introduces modern decision-making formats and a road map for providing consistent, well-articulated analysis and recommendations.

WHO WILL BENEFIT
This course is particularly valuable to CPAs, CAs, CFOs and other professionals who develop or interpret financial information for analysis, decision-making and direct reports in medium to large firms with revenues greater than $10 million.

This program is designed for participants from the private sector in for-profit companies. However, it may be of interest to members of the public or not-for-profit sector who are looking for private sector best practices to guide their organizations.

LEARNING OUTCOMES
At the end of this course, you will understand and articulate a company’s true financial performance, its key weaknesses and strengths, and evaluate implications for its strategic positioning. Insights into financial planning and forecasting, implications on investment and financial decisions and implications of non-financial performance metrics are areas explored.

This course is invaluable when preparing for changes to the current operations and undertaking future investment and financial decisions for growth including mergers and acquisitions.

This course uses examples and cases that are relevant for businesses with revenues greater than $10 million.

TOPICS INCLUDE
• Understand linkage of financial metrics to strategy and positioning
• Learn to choose the right analysis framework for the task at hand and risk assessment
• Link shareholder and stakeholder needs for disclosure and reporting
• Understand linkage between strategy and financial analysis and between corporate and financial plan
• Build a financial planning and forecasting model for investment and acquisitions
• Build an efficient and effective CFO team to deliver business value

SEMINAR LEADER/S (see Instructor Bios)
Vijay Jog, Ph.D.

December 3, 2014, 9am - 5pm
ICANS Learning Centre
1 Passport Day | 7 PD Hours

For Course Fees, see Pricing Information.
Practical Financial Negotiation Tips  
PD14150741 | New  
Level: Intermediate  

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

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

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

SEMINAR LEADER/S (see Instructor Bios)  
Stephen Priddle, CPA, CA, CMA  

November 21, 2014, 9am - 12pm  
WTCC  
½ Passport Day | 3 PD Hours

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Practical Tips for Controllers & CFOs  
PD14150721 | Reoffering  
Level: Intermediate  

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

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

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

SEMINAR LEADER/S (see Instructor Bios)  
Stephen Priddle, CPA, CA, CMA  

November 20, 2014, 9am - 5pm  
WTCC  
1 Passport Day | 7 PD Hours
Practical Tips for Not-For-Profit Financial Leaders
PD14150731 | New Level: Intermediate

This seminar covers useful tips and cases for accountants who work Not-For-Profit organizations. The tips are illustrated through concrete examples derived from real experience. You won’t find these tips in courses or text books, but you’ll be able to use many of them. Value will also be derived from the sharing of experiences and practices by the participants. The seminar was created and is presented by an experienced CFO, with extensive real-life insight, who has created a number of courses and has spoken to thousands of accountants.

AGENDA
• Tips on key indicator reporting
• More useful financial reporting
• Getting the most out of your bank
• Cost-cutting tips
• The fast close
• Ethics in an Not-For-Profit context
• System conversion dos and don’ts
• Creative thinking for accountants
• Auditors & lawyers: minimizing costs
• Brainstorming on Not-For-Profit sector challenges
• Managing your board
• Interviewing accountants
• What to do when you join a new employer in the sector

WHO SHOULD ATTEND
Accountants at any level who work in the Not-for-Profit sector.
Accountants in public practice who advise clients in the Not-For-Profit sector.

SEMINAR LEADER/S (see Instructor Bios)
Stephen Priddle, CPA, CA, CMA

November 19, 2014, 9am - 5pm
WTCC
1 Passport Day  |  7 PD Hours

Ten Practical Topics For Accountants In Leadership
PD14150751 | New Level: Intermediate

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

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

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

SEMINAR LEADER/S (see Instructor Bios)
Stephen Priddle, CPA, CA, CMA

November 21, 2014, 1pm - 4pm
WTCC
½ Passport Day  |  3 PD Hours
Today’s CFO Tomorrow
PD14150761 | Reoffering
Level: Advanced

Today’s CFO role is more demanding than ever. Knowledge of accounting and tax is assumed and still important, but the modern CFO has a role to play that is far greater within the organization. The CFO has always been looked upon as a Steward, but protecting the assets entrusted to them has become more complex, more demanding, and more intensive. As an Operator, the CFO needs to identify talent, manage talent, and run the financial nerve center of the company. The CFO is uniquely positioned to play a pivotal role as the Strategist in the organization, often acting as the sounding board for the CEO and the Board. Finally, the Catalyst CFO is constantly seeking to improve the efficiency, identify when change is necessary, and if necessary, deliver improvements that help the organization achieve its goals. It is a tall order for one individual to fulfill, but it’s the challenge many accounting and financial professionals seek.

In this course, we are going to explore the role of the CFO and immerse you in scenarios to initiate development of your competency in each of these specific areas. You will leave with not only a better understanding of specific technical topics, but you’ll have a framework for managing your career path whether you are presently a CFO looking to round out your toolkit, or you are an individual aspiring to the CFO role.

LEARNING OBJECTIVES
After completion of the program, the participant should be able to:
• Identify a competency framework for the CFO/Senior Financial Professional
• Facilitate strategic planning initiatives, including facilitating the development of strategic alternatives and leading the implementation of the strategic plan
• Lead business process improvement initiatives
• Coach and mentor individuals and teams within the organization
• Organize a risk management plan, including modern prevention and detection fraud techniques
• Describe corporate governance best practices

KEY TECHNICAL COVERAGE
• Strategic planning and implementation
• Business process improvement
• Coaching and mentoring
• Risk management
• Fraud awareness, prevention, and detection techniques
• Corporate governance

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

January 8-9, 2015, 9am - 5pm
ICANS Learning Centre
2 Passport Day | 14 PD Hours
**Alternate Dispute Resolution in Business**

PD14150142 | 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

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

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**Are You Having a Near Life Experience? C’mon, You can’t really have it all ...Finding Perfect-Imperfect Balance**

PD14150771 | Reoffering

If you are in pursuit of down-to-earth, practical and sincere methods of balancing all the demands and responsibilities in your life, work and family it’s time to find some answers. The realization that we can’t have everything, and that speed isn’t the answer has fuelled the search for insights and strategies that can make an honest difference.

This program will help you decrease the burden of stress and guilt, become more focused and committed to your important goals and values, and magnify the satisfaction and fulfillment you get from both home and work life. You will leave with insights, tools and strategies to slow down, let go, be present, stay focused, create boundaries, lighten up, build resilience and sustain your enthusiasm for life!

**Practice Rigorous Self-Care**

- Slow Down, Work More Intensely and Recover More Deeply
- How are You Investing In Your Capacity for Contribution?
- How will you Sustain Energy and Performance Over the Long Haul? (Personal Assessments)
- Choose Rituals Focussed on Renewal ... What do You do In a Day that Rejuvenates You?
- Get Good at Renewal ... The Higher the Demand The Greater and More Frequent the Need for It
- Change and Create New Habits ... Practical Suggestions and Ideas
- Why Sleep is the Most Important Self-Care Choice For People Today ... What Not Sleeping is Doing to You
- Exercise, Nutrition ... How to Pre-Decide so That You Are Not Continually Trying to Resist Doing It
- Know What Small Things Inspire You ... Know What the Big Things Are Too - Write a List of Ways to Stay Excited and Invested in Life and Work ... This Will Surprise You

**Learning to Be Present**

- End Permanent Urgency and Endless Distraction: The Cost is Less Capacity for Focused Attention, Less Time for Any Given Task, and Less Opportunity to Think Reflectively and Long Term
- Stop Multi-tasking ... Do One Thing at a Time with Absorbed Attention
- Reduce Worry, Anxiety and Guilt : Get Out of Your Head and Into Right Here Now ... There is no Pain in the Moment
- Stop Being Over-informed and Under-reflective: Learn to Think Better by Becoming More Aware and Responsive
- Choose to Be More Present by Re-engaging Your Senses ... Move Out of Numbness
- Learn Simple Strategies to Stay Centered and Grounded Regardless of What’s Going On Around You
- Embrace It All – Practice Three Skills Needed to Stay Open to Life – Attention, Intention, No Tension
- Live Above The Line - Experience The Freedom Of Accountability
- Miss An Opportunity To Laugh
- Forget Quantity Or Quality It's Connection That And Stay Connected To What Matters
- Protect Your Sanity: Use Rituals To Rejuvenate and Some Policies And Regain Control
- Three Signs Of Fulfillment; Contentment, Calmness And Connection
- Build Boundaries Around Your Time, Set Strategies To Help You Banish Guilt Forever And Stay Present
- Three Signs Of Fulfillment; Contentment, Calmness And Connection
- Live Above The Line - Experience The Freedom Of Accountability
- Are Not Continually Trying to Resist Doing It
- Choose Rituals Focussed on Renewal ... What do You do In a Day that Rejuvenates You?
- Get Good at Renewal ... The Higher the Demand The Greater and More Frequent the Need for It
- Change and Create New Habits ... Practical Suggestions and Ideas
- Why Sleep is the Most Important Self-Care Choice For People Today ... What Not Sleeping is Doing to You
- Exercise, Nutrition ... How to Pre-Decide so That You Are Not Continually Trying to Resist Doing It
- Know What Small Things Inspire You ... Know What the Big Things Are Too - Write a List of Ways to Stay Excited and Invested in Life and Work ... This Will Surprise You

**Moving to Fulfillment - Eliminating Struggle**

- Strategies To Slow Down And Reclaim Peace And Ease
- Three Signs Of Fulfillment; Contentment, Calmness And Connection
- The Higher the Demand The Greater and More Frequent the Need for It
- Build Boundaries Around Your Time, Set Strategies To Help You Banish Guilt Forever And Stay Present
- Three Signs Of Fulfillment; Contentment, Calmness And Connection
- Live Above The Line - Experience The Freedom Of Accountability
- Are Not Continually Trying to Resist Doing It
- Choose Rituals Focussed on Renewal ... What do You do In a Day that Rejuvenates You?
- Get Good at Renewal ... The Higher the Demand The Greater and More Frequent the Need for It
- Change and Create New Habits ... Practical Suggestions and Ideas
- Why Sleep is the Most Important Self-Care Choice For People Today ... What Not Sleeping is Doing to You
- Exercise, Nutrition ... How to Pre-Decide so That You Are Not Continually Trying to Resist Doing It
- Know What Small Things Inspire You ... Know What the Big Things Are Too - Write a List of Ways to Stay Excited and Invested in Life and Work ... This Will Surprise You

**OUTCOMES**

- Leaders who know and act on the key inspirational factors for today’s workforce
- More energized, confident, optimistic, alive, purposeful passionate and engaged employees
- More employees and leaders reporting higher levels of satisfaction with the organization
- A Corporate Culture that attracts, retains and engages people who perform at the highest level
- Greater organizational and individual success and satisfaction

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

Tammy Robertson, MA

December 11, 2014, 9am - 5pm
ICANS Learning Centre
1 Passport Day | 7 PD Hours
Business Process Mapping
PD14150152 | Reoffering
Level: Introductory

Process Mapping and Design will help your company draw out how work gets done in a specific area that will improve your company’s day to day operation and improve upon your customer focused- quality driven environment.

This workshop will enable you to have a general understanding of process mapping. The course will familiarize you with why, what and how process mapping is done to obtain an objective.

What is Business Process Mapping?
• Understand what is meant by business process mapping
• A visual representation of how work happens

Reasons to Map a Process
• Understand why process mapping is used
• Uncover ambiguities, misunderstandings, or different opinions about how a process works

Components of Business Process Mapping
• Based on the purpose of why you are mapping a process, the map will have a clear definition, in terms of both departure point and end point and what is included in the process

Basic Steps of Business Process Mapping
• How to facilitate process mapping
• The stages of process mapping
• The team members needed to ensure your process map is effective and efficient

Execution
• Identifying the type of process map needed
• How to construct various versions of process maps
• Understanding bottlenecks and load statistics uses

Implementation
• Decisions made after your process map is completed; understanding a process map is more beneficial when completed to determine if implementation is needed
• Follow up on your process map; talking to the decision makers

How to Read Process Maps
• Basic steps to read a process map

Analyze Process Maps
• Understand how to analyze process mapping
• Identify broken processes through symptoms and evaluate process capability
• Create strategies for overcoming barriers to process improvement

Put it all Together
• Identify the benefits of process mapping in your company
• How to create steps to eliminate quality issues

Dealing with Difficult People
PD14150801 | Updated

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 skillfully.

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

February 26, 2015, 9am - 5pm
ICANS Learning Centre
1 Passport Day | 7 PD Hours
Defining and Managing Projects
PD14150162  |  Reoffering
Level: Introductory

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

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

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

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

SEMINAR LEADER/S (see Instructor Bios)
Michael Frenette, PMP, I.S.P., CMC, MCITP

November 6, 2014, 9am - 5pm
ICANS Learning Centre
1 Passport Day  |  7 PD Hours

Delegation - Sharing the Load Effectively
PD14150811  |  Updated

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

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

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

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

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

February 27, 2015, 1pm - 4pm
ICANS Learning Centre
½ Passport Day  |  3 PD Hours

For Course Fees, see Pricing Information.
PROFESSIONAL & PERSONAL SKILLS

Eat Your Elephant: 
A Personal Success Workshop
PD14150821 | Updated

In front of each of us, sits an elephant representing what we have always wanted to accomplish; the dream we want to live and hope one day will magically come true. The truth is - there is no magic. We create our own magic the same way we make luck, when our preparation meets an opportunity and sometimes we need to create our own opportunity.

We have each attained professional success and this success has opened many doors. Have they been the doors you wanted, or perhaps you may feel like there is something more for you to accomplish or something different you should be doing? This workshop explores what may cause us to stay with ‘good enough’ instead of reaching for fabulous, and it invites us to consider new perspectives of personal success. The session will challenge you to take your life off of auto pilot, providing you with a framework for action so that you may start living the life you were born to live.

You will leave the workshop with tools to help you be successful in achieving your own uniquely personal goals and aspirations. As respected author John Maxwell says, “95% of achieving anything is knowing what you want and paying the price to get it.” So, the big question is, what do you want? What is your elephant? Join us for this personal success workshop so that we may explore this question together as you learn how to eat your elephant, one bite at a time.

KEY LEARNING OUTCOMES
• Understanding key principles to personal success, including what may hold you back
• Understanding some of the obstacles that may impede your progress
• Tools to build a personalized action plan to support and guide your success journey
• Practical approaches to implementing your personalized plan successfully

THIS WORKSHOP WILL APPEAL TO YOU IF
• You recently achieved your designation and are wondering what to do next
• You are thinking about a change and are wondering what steps you should take next
• You feel stuck in any part of your life and are looking for ways to break out of the rut
• You are considering retirement and are exploring ideas for post retirement activity
• The workshop will include a variety of interactive and reflective exercises designed to help you develop your personal success plan.

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

Effective Communication Skills for Outstanding Performance
PD14150831 | Updated

One study of 500 highly successful organizations revealed that peak performance had little to do with forms, procedures and policies that drive performance management. What was behind their success was how their people handled crucial conversations. Effectiveness in this area of communication relates directly to higher productivity, quality, safety and retention. In an ideal world all employees would take more ownership for handling communication issues as they arise to support the creation of more feedback friendly cultures in the workplace.

You don’t have to like all your co-workers but you do need to care about the relationship. Every time you communicate with someone you are influencing that relationship. A good relationship is one whereby individuals are able to deal with differences effectively.

Because we are making assumptions about events that occur around us all the time, our interpretations can create issues with others that may not really exist. We waste time wondering about what that comment by a co-worker really means or what tone may be behind that email we just received. We all can be around us all the time, our interpretations can create issues with others that may not really exist. We waste time wondering about what that comment by a co-worker really means or what tone may be behind that email we just received. We all can be.

In this stimulating, hands-on workshop join me in learning more about your conflict style and learn practical tools for communication effectiveness:
• Understand how your paradigm creates your results
• Learn and practice an effective 4 step communication tool for conflict prevention
• Learn more about your conflict style and shifts you can make to be more effective in resolving issues with others
• Learn how to engage in the art of compassionate confrontation in a manner that lowers defensiveness and creates safety
• Learn a practical 8 step model to request behavioral change in others
• Learn how to stay present when emotions run strong and be in your cortex in the process

I invite you to join us for this practical, hands-on workshop designed to enhance your comfort level and ability to engage in constructive conversations.

WHO SHOULD ATTEND
Managers, supervisors, and anyone interested in improving communication effectiveness for conflict prevention and giving constructive feedback to create better results and working relationships.

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

November 7, 2014, 9am - 4pm
ICANS Learning Centre
1 Passport Day | 6 PD Hours

February 24, 2015, 9am - 5pm
ICANS Learning Centre
1 Passport Day | 7 PD Hours
Email Efficiency: Writing for the Wired World  
PD14150172 | New

Readers are busy people. When they are kind enough to begin reading our words, they also begin thinking about doing something else. Alerts are flashing across the screen, links tempt them away, and Facebook tells them someone has commented on their photo.

Writers always knew some readers would abandon them before finishing their piece, but now we know exactly how long readers spend on our pages, what holds their attention, and when they leave.

We can improve our writing to retain readers. Online readers like short sentences, short paragraphs, and lots of white space.
1. 79% of users always scan; only 16% read word-by-word.
2. Reading from computer screens is 25% slower than from paper. Internet content should be 50% less words than its paper equivalent.

By Jakob Nielsen, engineer; PJ Schemenaur, technical editor; and Jonathan Fox, editor-in-chief, www.sun.com

PROGRAM CONTENTS:
• How to clarify the response you want from a message
• How to make sure the recipient does what you need
• How to avoid cliché words and phrases that confuse or irritate people
• How to build a toolbox of tones so you always use the best fit
• How to assess your audience and calibrate your writing style
• When to CC and when to BCC and why you should almost never “Reply All”
• How to change the Subject to get quicker responses
• Avoid the F-word: when Forwarding goes wrong
• Guidelines for writing website content or online promotions

PROGRAM BENEFITS
This course will help you:
• Improve your communication skills
• Write fewer emails
• Control your email so your email doesn’t control you
• Respond to emails so the sender is satisfied
• Learn the “One Mail, One Message” rule
• Punctuate your emails to improve clarity
• Handle “flaming”, “LOL-ing” and emoticons
• Use proper netiquette

WHO WILL BENEFIT
Anyone who regularly emails clients and colleagues and wants to make a better e-impression.

SEMINAR LEADER/S (see Instructor Bios)  
Jon Tattrie

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

Email Etiquette: Create the Right Tone & Get the Best Response  
PD14150841 | New

The disembodied world of e-communications is fraught with potential miscommunications.

It’s all too easy to thumb off a quick message on your smartphone that unwittingly offends the recipient with a blunt tone. At your desk, it’s also easy to write flowery language around the key issue for so long that you lose your audience before you get your message across.

Learn how to strike the right tone in e-mails so that your recipient cannot possibly misunderstand you, and gives you the information you want.

PROGRAM CONTENT
• How to clarify the response you want from a message
• How to make sure the recipient does what you need
• How to avoid cliché words and phrases that confuse or irritate people
• How to build a toolbox of tones so you always use the best fit
• How to assess your audience and calibrate your writing style
• When to CC and when to BCC and why you should almost never “Reply All”
• How to change the Subject to get quicker responses
• Avoid the F-word: when Forwarding goes wrong

PROGRAM BENEFITS
This course will help you:
• Improve your communication skills
• Write fewer emails
• Control your email so your email doesn’t control you
• Respond to emails so the sender is satisfied
• Learn the “One Mail, One Message” rule
• Punctuate your emails to improve clarity
• Handle “flaming”, “LOL-ing” and emoticons
• Use proper netiquette

WHO WILL BENEFIT
Anyone who regularly emails clients and colleagues and wants to make a better e-impression.

SEMINAR LEADER/S (see Instructor Bios)  
Jon Tattrie

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

For Course Fees, see Pricing Information.
**Employment Law A-Z**
PD14150851 | Updated

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

December 5, 2014, 1pm - 4pm
ICANS Learning Centre
½ Passport Day | 3 PD Hours

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**Energize Your Workplace ... How Inspiring Leaders Wake People Up!**
PD14150861 | Reoffering

Would you like to know how to truly inspire your people to dig in, see the possibilities and innovatively create the future? How can you increase the focus and capacity of your leaders and front line employees? How do you get people to embrace and drive real change? Add solid value? See better results? If you are asking these questions you are not alone. Leaders today are urgent for solutions that can be applied in the real world, by real people in real time.

Effective inspiring leadership centres around three things ... getting to the core issues, identifying the challenges, exploring possibilities for effective action and holding people accountable to big positive impact.

**Compelling Cultures**
- A Look at the Research ... What’s Up?
- Why People aren’t 100% Engaged?
- Value Shift: 6 Expectations of the New Workforce
- Leadership Questions to Ask around Meaning, Learning, Partnership, Trust, Balance and Fun

**Inspiration vs Motivation: Is There a Difference and Does it Matter?**
- What it means to be an Inspirational Leader and How to Inspire
- The Three Keys to inspirational Leadership: Authentic Presence, Self Direction and Full Engagement
- Generational Challenges: What Every Generation Wants
- The Supreme Value of Acknowledgment and Appreciation
- What Does it Really Look Like?
- Ways to Build Your Employees sense of Importance

**Strategies For Overcoming Team Disengagement**
- 6 Ways to Build More Trust in Your Team
- Master Conflict - Get Comfortable being Uncomfortable
- Mine for Conflict
- Adopt Two Rules that Allow People to Surface Challenges and Feel Heard
- Avoid “Yabuts” ... Use “Yes, and ...”
- Build the Foundation for Commitment - Clarify Team Principles
- Use the Disagree and Commit Philosophy
- Use one Key Question to Focus Energy and Effort
- Three Strategies for Team Accountability

**Practical Applications for Inspiration**
- Toolbox of Ideas for Bringing to Life the 6 Expectations
- More Ideas For Holding Yourself Accountable to Your Own Growth - Pick Two or Three to Work On
- Ten Questions for Accountability

**OUTCOMES**
- Leaders who know and act on the key inspirational factors for today’s workforce
- More energized, confident, optimistic, alive, purposeful passionate and engaged employees
- More employees and leaders reporting higher levels of satisfaction with the organization
- A Corporate Culture that attracts, retains and engages people who perform at the highest level
- Greater organizational and individual success and satisfaction

**SEMINAR LEADER/S** (see Instructor Bios)
Tammy Robertson, MA

December 12, 2014, 9am - 5pm
ICANS Learning Centre
1 Passport Day | 7 PD Hours
Finding Flow: The Art and Science of Motivation  
PD14150871  |  Reoffering

Do you love to win or hate to lose?

Researchers continue to learn more about the human brain, human drives and motivation, including why it matters whether someone loves to win or hates to lose. Motivation is a complex phenomenon. Our effectiveness in managing our teams for great performance will inherently be affected by the individuals, their motivational tendencies and the environment we create. In this seminar, we will take an in-depth look at recent motivational theory and explore how we might apply what researchers have learned in today’s work environment.

During this seminar, participants will:
• Review and challenge some of the historical perspectives of motivation
• Consider the role of the brain and human drives as they relate to motivation
• Explore motivational flow, inner work life and other concepts that apply in today’s work environment
• Practice the application of theory through case examples

At the end of this workshop, participants will have an understanding of:
• Updated perspectives on motivation and individual motivational tendencies
• What research tells us employees really want
• How you might apply the learning in your current work environment
• How your leadership approach can influence motivation

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

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

Get More Power from Your Brain  
PD14150881  |  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

March 24, 2015, 9am - 5pm
ICANS Learning Centre
1 Passport Day  |  7 PD Hours

For Course Fees, see Pricing Information.
PROFESSIONAL & PERSONAL SKILLS

Get Organized & Take Control @ Work
PD14150891  |  Reoffering

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

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

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

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

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

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

SEMINAR LEADER/S (see Instructor Bios)
Jane Veldhoven, CPO®

February 13, 2015, 1pm - 4pm
ICANS Learning Centre
½ Passport Day  |  3 PD Hours

I’m Right – You’re Wrong!
PD14150901  |  New

Turn disagreements into improved relationships.

We all know the moment when we overreact to something a person said. We assume that we know exactly what he or she means and we simply can’t accept the position they have adopted. In reply, we assert our own opposing point of view and inevitably an argument arises.

“I’m right – you’re wrong!” Although we would rarely, if ever, make that statement out loud, we often act as if our interpretation of a situation is the “correct” or only possible interpretation. This thinking pattern can lead to misunderstanding, frustration, conflict and stress.

Conflicts exist because people do not always perceive, think, feel or behave in the same way about the same things. While conflicts are inevitable, how you respond is manageable.

PROGRAM CONTENT
• How to handle difficult situations and difficult conversations
• How to communicate effectively from the beginning
• How to identify and control your own hostility traps
• How to recognize your choices when faced with conflict
• How to use an effective listening and paraphrasing technique to develop rapport
• How to ask good questions to develop better solutions
• How to be less uncomfortable when dealing with misunderstandings and conflict

PROGRAM BENEFITS
This course will help you...
• Polish your thinking skills
• Enhance your communication and interpersonal effectiveness
• Reduce your stress while handling conflict professionally
• Understand the role of perception
• Seek to understand before trying to be understood
• Understand the causes of conflict at work and at home to determine what is really happening

WHO WILL BENEFIT
Anyone who interacts with a variety of people in different situations, and who wants to enhance his or her interpersonal skills and leadership skills.

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

March 23, 2015, 9am - 5pm
ICANS Learning Centre
1 Passport Day  |  7 PD Hours
Influential Leadership: Leading Teams and Others
PD14150911 | Reoffering

OBJECTIVES
The objective of this session is to understand the dynamics in building a high performance team. To win in business, you can’t go it alone. Success is a team sport. Being an effective leader means that you have the ability to engage a team to work together toward a common goal. When it’s done right, the team wins, and the organization moves forward.

However, studies show that less than 20% of leaders and their teams work together effectively - more than four out of five teams do not achieve their potential!

In this one-day workshop will explore the dynamic of achieving results through your greatest asset – your people.

LEARNING OUTCOMES
For any leader who wants to maximize their team’s performance, this workshop provides practical, bottom-line outcomes through a combination of innovative concepts, proven tools, interactive exercises and case studies as well as assessments to build self-awareness and effectiveness.

Having a high-performing team means having more money, more time, and less stress!

The only way a leader can truly gain sustainable, long term success is by building a productive and engaged team.

WHO WILL BENEFIT
This course is best suited for managers, executives, and professionals charged with leading teams and others. Whether you lead one person or one hundred, your success is dependent on the success and engagement of those around you.

SESSION OUTLINE
• Delegate and empower team members
• Drive accountability and engage people
• Understand leadership style and influence successfully
• Focus on the right priorities and work strategically
• Hire and develop the right people for the right positions
• Provide effective feedback to support growth

SEMINAR LEADER/S (see Instructor Bios)
Bluteau DeVenney

Kirk vs. Spock: Making Better Decisions
PD14150921 | New

The Starship Enterprise has two great decision-makers on board: Captain Kirk and First Officer Spock. Who do you make decisions like? Which one of them does your organization need making decisions?

As accountants we literally face dozens of decisions every day - big and small - from those more akin to intergalactic warfare to the everyday. Decision making is a skill with many facets: what barriers are there to good decision-making, what do I do to ensure the best decision possible, how can I be an effective collaborator, how can I move a change process forward, how can I add the most value, and how can I harness the most value from my crew?

Join me for a memorable, practical and interactive view of 25th century decision making. Take away a practical process and many tips from the latest research in neuroscience that you can apply on your next decision-making mission, develop new insights for targeting your development and that of others, and rethink the roles of your first officer and other crew members in the decision making process.

You Will Get:
• Many ideas to boost your decision making confidence and credibility
• Fresh insights from the latest scientific research and practical applications
• How to truly harness the decision-making prowess of your crew
• Improved quality, commitment, and efficiency of decision-making

SEMINAR LEADER/S (see Instructor Bios)
Samantha Kerr Hurwitz CMA CHRP

November 28, 2014, 9am - 5pm
ICANS Learning Centre
1 Passport Day | 7 PD Hours

For Course Fees, see Pricing Information.
Meetings to Live For!
PDP14150931 | Reoffering

A recent poll by a New York consulting firm of 471 management leaders found that well over one-half of the respondents to their survey considered many of their meetings to be a waste of time. With numerous senior leaders spending up to 15+ hours a week in meetings, this is a sobering statistic impacting productivity and morale.

The ability to run an efficient, effective and productive meeting is a crucial component of leadership. A meeting that is well planned and skillfully executed leaves people feeling energized, motivated, purposeful and with a feeling of forward movement toward a particular goal. Unfortunately, all too often meetings are a source of frustration to team members because managers may not understand how to run them effectively.

For managers, the ability to run productive meetings is critical because it is in this situation that one is viewed by employees as a real leader versus someone in an office to which they report. It is an important platform for the leader to unite, focus and motivate team members.

Fortunately, one can learn skills to greatly improve one's ability to run efficient, effective and productive meetings. In this entertaining, practical workshop, join us as we delve into the art of effective meetings to learn:

- The 5 key frameworks for effective meetings
- The Top Ten Tips for running effective meetings
- Several techniques for uniting, focusing and mobilizing the group
- To organize meetings by context: administrative, tactical or strategic
- To improve your meeting skills whether you are the Chair or attendee
- Learn key tips that will improve the quality of any meeting

Running productive meetings is an important leadership skill that informs the core of any quality project. Come and join us for this engaging, entertaining and content rich workshop that will help you create “meetings to live for” delivered in a respectful manner and with a good dose of humour!

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

March 25, 2015, 9am - 12pm
ICANS Learning Centre
½ Passport Day | 3 PD Hours

Practical Project Management
PDP14150781 | New
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

January 23, 2015, 9am - 5pm
ICANS Learning Centre
1 Passport Day | 7 PD Hours
Project Scheduling
PD14150791 | New
Level: Intermediate

As project managers and leads, we all know how difficult it can be to accurately determine the duration of a project, yet that is exactly what is expected of us on a regular basis. This workshop will not disclose the secret of creating an accurate schedule, because there isn’t one. However, it will provide the factors and fundamental elements that you should consider and address when creating a project schedule.

This workshop will walk you through:
• Defining Projects and Project Scheduling
• Breaking down a project into manageable pieces (Work Breakdown Structure)
• Estimating the duration of activities
• Identifying dependencies between activities
• The Critical Path of a project
• Aligning Resources with Activities
• Dealing With Uncertainty and Risk
• Communication
• Scheduling Software
• Creating a Viable Schedule
• Updating and Monitoring the Schedule
• Performing Earned Value Management

WHO SHOULD ATTEND
Resources who find themselves involved with projects where limited or tight timelines where the proper scheduling of activities could make or break a project.

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

March 16, 2015, 9am - 5pm
ICANS Learning Centre
1 Passport Day | 7 PD Hours

Provincial Law
PD14150941 | Updated

Pre-qualification courses taken by CA students are designed to cover the requirements of the UFE Candidates’ Competency Map and ensure they are prepared for the UFE. Areas of provincial jurisdiction are not included in the curriculum since they are not part of the Competency Map. This course is designed to provide information about Nova Scotia provincial legislation which CAs need to practice as professionals.

Participants will receive comprehensive reference materials relating to:
• Nova Scotia legislation for companies, partnerships, and non-profit organizations
• Nova Scotia securities legislation
• Nova Scotia labour standards
• provincial sales tax and business occupancy tax
• provincial matters for specific industries such as environmental legislation, residential tenancies legislation and review of lawyer’s trust accounts
• sources of government financing (both federal and provincial)
• bankruptcy and insolvency (both federal and provincial)
• Nova Scotia Wills and Estates legislation
• structure and regulation of public accounting in Nova Scotia
• ICANS structure and the process for monitoring adherence to professional standards.
• ethics.

SEMINAR LEADER/S (see Instructor Bios)
Christena McIsaac, CA

November 21, 2014, 1pm - 4pm
WTCC
½ Passport Day | 3 PD Hours
Resiliency and Grit: You Have What it Takes to Bounce Back from Adversity and Challenge
PD14150951 | New

Do you have the resiliency and grit you need to bounce back quickly from setbacks, gain strength from adversity, and meet life head on? The key to resiliency – the ability to adapt to life’s changes and crises – is key to a healthy productive life. The new science of resiliency demonstrates why some people are more resilient than others and how it can be learned at any age.

Through stories, exercises and examples you will learn how to apply the thinking and take action that leads to greater ease, confidence and outcomes in your life and career. You will leave with actionable insights and valuable tools to take back control and feel armed to effectively handle the realities of today’s busy world. If you have been feeling besieged by life’s challenges, this program will leave you feeling validated and inspired and ready to roll!

YOU WILL LEARN HOW TO
• Sustain Health, Energy And Positive Feelings During The Biggest Challenges Of Your Life
• Develop Mental Toughness, Become More Emotionally Balanced And Remain Calm And Centered In The Midst Of Pressure And Change
• Move Swiftly From Resignation And Resentment To Acceptance And Positive Action
• Face Your Defaults (What You Do Without Thinking) And Do Something Different
• Tame The Voice In Your Head And Reduce Stress Without Losing Your Edge
• Practice Playful Curiosity So You Can Shift Perspective Easily
• Develop Empathy As A Survivor Skill
• Use Questions To Move From Confusion To Clarity And Inspire Bold Action
• Reclaim The Invincible Power Of Choosing To Choose
• Strengthen Your Self Esteem, Self Confidence And Self Concept
• Be Positive About Negative People And Deal With Angry People
• Develop The Specific Attributes And Skills Found In Highly Resilient People
• Practice Radical Acceptance And Surrender Without Giving Up Or Giving In
• Sharpen Your Talent For Serendipity – The Ability To Convert Accidents And Misfortune Into Lucky Accidents And Good Fortune
• Take A Powerful Stance, Make Meaning Of Everything And Feel Wiser, More Alive And More Invested Than You Ever Have
• Build A Blueprint For Personal Success You Can Implement Today

SEMINAR LEADER/S (see Instructor Bios)
Tammy Robertson, MA

Retirement Planning
PD14150961 | 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

December 5, 2014, 9am - 12pm
ICANS Learning Centre
½ Passport Day | 3 PD Hours
Root Cause Analysis
PD14150971 | New
Level: Intermediate

Companies spend considerable time and effort addressing problems. While we will never run out of problems needing solutions, if we find and address the root cause of any given problem, the problem is more likely to go away - for good.

This workshop will assist you in clarifying problems and will familiarize you with the tools, methods and techniques commonly used during Root Cause Analysis.

LEARNING OUTCOMES
• Understand and apply the processes of Root Cause Analysis
• Identify what is required to create an environment receptive to Root Cause Analysis
• Clearly identify and define problems
• Apply better problem solving skills
• Identify cause and effect relationships and the causal chain
• Identify and use Root Cause Analysis tools
• Evaluate whether a problem should be resolved

WHO SHOULD ATTEND
Any business professional involved with solving problems within their organization – be it a one-time issue or a repeat offender.

SEMINAR LEADER/S (see Instructor Bios)
Lorrie Slade, P.Eng
February 6, 2015, 9am - 5pm
ICANS Learning Centre
1 Passport Day | 7 PD Hours

Stop Putting Things Off and Master Your Priorities
PD14150981 | Updated

Do you ever find yourself saying, “I’ll Do It Tomorrow” and tomorrow never seems to come? Most of us procrastinate at one time or another. However the habitual postponement of important tasks can lead to a stressful life full of crises and disorganization.

In this 3-hour workshop you will identify your procrastination problems and learn some tips and tricks for getting you past that stage and into productive and timely activity. If you feel overwhelmed by the number of tasks piling up and find that you tend to procrastinate on starting or finishing important projects then this workshop is for you.

LEARNING OUTCOMES
• Understanding when and why procrastination is bad – or good
• Understanding your personal reasons for and signs of procrastination
• Selecting some ideas to help you get past the initial problem and into the project
• Planning specific actions to put those ideas into practice

CONTENT
• What is procrastination?
• Why do we procrastinate?
• 6 strategies for tackling overwhelming tasks
• Perfectionism
• When to just ditch it
• Goals, priorities and procrastination
• When and why say ‘no’
• Working with procrastinators

SEMINAR LEADER/S (see Instructor Bios)
Jane Veldhoven, CPO
March 25, 2015, 1pm - 4pm
ICANS Learning Centre
½ Passport Day | 3 PD Hours

For Course Fees, see Pricing Information.
PROFESSIONAL & PERSONAL SKILLS

Strategic Relationship Skills for Influence
PD14150991 | New

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

March 17, 2015, 9am - 4pm
ICANS Learning Centre
1 Passport Day | 6 PD Hours

Stress - Taking a Problem Solving Approach
PD14151001 | New

Research shows that stress management is a vital contributor to enhancing work performance, reducing interpersonal friction, diminishing mood swings, and ultimately to achieving an increased sense of personal control. The first step in coping with stress is to fully understand what it is all about. Then, armed with sound information and practical advice, you can begin to handle your challenges more comfortably.

This workshop is based on the premise that you can learn to understand your own response to the particular stressors in your life. Then you can develop a problem solving approach that will help you reduce the negative impact, and increase the positive impact of these stressors.

Participants take an active role in learning how to implement problem-solving strategies, both on the job and at home. The workshop includes a psycho-educational component, which is complimented by discussions, exercises, reflection, and problem solving.

After this workshop, you will be able to:
• Identify the potential stressors for you
• Understand how body/mind indicates types of stress
• Use a problem solving approach to find solutions to your stress
• Recognize what has, and has not, worked for you
• Learn to control worry and fear
• Understand that procrastination multiplies your stress and how to reduce it
• Appreciate how you deplete your willpower, and give in to temptation
• Deal more comfortably with difficult people
• Use some quick and easy stress reduction techniques
• Identify the negative coping methods you use and substitute positive ones
• Develop long term strategies for coping with stress and change

OF INTEREST TO
This workshop is designed for people at all levels in the organization who would like to learn some new strategies to reduce their stress and get more power from their intelligence and experience. This workshop is for people who want to live life fully moment to moment.

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

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

Take Back Your Time  
PD14151011 | Reoffering  

We all have the same 24 hours a day to complete tasks and we can all be more effective in how we direct our activities toward the achievement of our objectives. This includes goal setting, planning, scheduling, managing energy, and organization. We cannot manage “time” we can only manage our priorities.

Join us for this stimulating workshop where you will have the opportunity to assess your current strengths regarding priority management and develop an action plan for areas where you would like to focus for maximum return on your time by exploring:

• Common productivity challenges  
• The distinction between Urgency vs. Importance in task prioritization  
• The benefits and power of daily planning  
• How to deal more effectively with Interruptions and Distractions  
• How to curb procrastination and move forward  
• Practical tips for Time Leverage that build focus and momentum  
• Create your action plan to move forward

We will review common myths to time management, common mistakes that create “crisis” situations and many tips for improving your time management skills. You will leave this workshop armed with numerous practical tools for productivity and a personalized action plan outlining your next steps. One of my goals is to support people to shift ineffective patterns so they may experience less WORK in their LIFE and more LIFE in their WORK. Join us and learn how to create more focus and momentum in your work life!

WHO SHOULD ATTEND  
Managers, supervisors, and anyone interested in assessing where they are now and what they can change to manage priorities more effectively.

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

November 17, 2014, 1pm -4pm  
WTCC  
½ Passport Day | 3 PD Hours

Take Control of E-mail  
PD14151021 | Reoffering  

Did You Know: 85% of Business Communicators say e-mail overload is having a negative impact on their productivity*? Do you or your organization need to cut down on unproductive time spent managing e-mail, but no one knows where to start? During this 3-hour interactive session, participants will gain a renewed sense of clarity, calm and control and will become more efficient, effective and productive in managing e-mail communication.

*According to a survey conducted by the International Association of Business Communicators

LEARNING OUTCOMES  
• Understand the current state of e-mail communication  
• Learn to control e-mail by setting up organizing systems  
• Establish practices for managing incoming and outgoing e-mail  
• Reduce the volume of e-mail generated by your company or organization  
• Put these proven techniques into practice

CONTENT  
• Introduction and e-mail fast facts  
• Identify advantages and disadvantages of e-mail  
• The basics of organizing e-mail  
• Scheduling e-mail time  
• Tips for managing incoming e-mail  
• Identify e-mail folder structure and categories  
• Creating custom folders and filing e-mail  
• Managing outgoing e-mail

WHO SHOULD ATTEND  
Anyone who uses Microsoft Outlook or GroupWise to communicate via e-mail at work and feels overwhelmed by the size of their inbox, the volume of e-mail they are required to manage and how it is affecting their productivity, or has difficulty in filing and finding e-mail messages. Participants will be asked to bring specific pieces of information with them to this workshop.

SEMINAR LEADER/S (see Instructor Bios)  
Jane Veldhoven, CPO®

November 19, 2014, 1pm - 4pm  
WTCC  
½ Passport Day | 3 PD Hours
The Art of Effective Delegation
PD14150292 | Reoffering

As a leader, you must delegate tasks to create more time to focus on innovation and key strategic objectives. Delegation is a critical skill to master for it is also important for the growth and development of your future leaders. Also, you need to take the pressure off yourself to be the expert “go to person” solving everyone’s problems because this is unsustainable and creates dependency.

Have you ever delegated a task only to find that what came back to you was not what you thought you requested? One of the reasons delegation fails is that many assumptions are made during the delegation conversation that are not communicated. This leads to miscommunication and frustration for both parties.

In this interactive workshop you will learn:
• How to overcome barriers to actually doing it versus talking about it
• 14 key guidelines for delegation success
• How to analyze the thinking skills needed for the task both technical and interpersonal
• How to select the best person for the job
• How to get buy-in from your staff before the delegation process begins
• A 2 phase process for delegation- the 2nd phase is a comprehensive 9 step model for the delegation conversation
• Key communication oversights you’ve made in the past that led to unsatisfactory results
• How to engage in a delegation conversation for a successful outcome both for you and your direct report

After participants take this workshop they usually say: there is a lot more to delegation than I thought! If your delegation approach follows the 9 step model, you have a 99% better chance of your outcomes being realized. Come and learn how to delegate work in a way that builds capacity and competency in your people but doesn’t leave them feeling unsupported or unacknowledged!

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

November 17, 2014, 9am - 12pm
WTCC
½ Passport Day | 3 PD Hours

The Art of Giving and Receiving Effective Feedback
PD14151031 | Reoffering

Most employees are unsatisfied with the frequency and type of feedback they receive. Many claim the only time they get feedback is when something goes wrong. This is the case in many organizations. Constructive feedback certainly outpaces positive acknowledgement in most performance management communications.

This has led to acknowledgement deprived workplace environments that diminish engagement. In addition, whether positive or constructive, feedback is rarely delivered in the most effective, meaningful and relevant manner for those receiving it.

As leaders we must be in tune with individual feedback needs. We can strive to deliver these communications in a timely manner that is respectful and appropriate to each team member.

Join me for this stimulating, hands-on workshop where you will engage in the following learning objectives:
• Assess current communication challenges and barriers
• Learn and work with a practical 9 step model for giving feedback
• Learn communication skills to respond to defensive reactions
• Learn how to receive difficult feedback
• Learn how to give positive feedback that resonates with others
• Assess feedback frequency as needed by direct reports
• Understand how to implement a coach approach to feedback
• Learn how to optimize one-to-one meeting time with your direct reports by working with a compelling 7 step model that engages your team members to: create clarity and identify central issues quickly and to generate accountable next steps to resolution of the challenge at hand.
• Create an action plan for implementation at workplace

People will be frustrated if they’re micro-managed or if they’re left alone so much they never receive feedback of any kind. Effectively engaging in performance feedback communications that meet your needs and the needs of your employees can be stress-free. With practical guidelines for these conversations, both parties will be more at ease and the interactions will be more efficient and meaningful.

WHO SHOULD ATTEND
Managers, supervisors, and anyone interested in improving feedback and communication effectiveness for better bottom line results and stronger working relationships.

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

November 18, 2014, 9am - 5pm
WTCC
1 Passport Day | 7 PD Hours
PROFESSIONAL & PERSONAL SKILLS

**The Creative Accountant**
PD14150212 | Reoffering

**DESCRIPTION**
Over 80% of organizations in North America have the words creative or innovative in their vision or mission statements. Realizing the vision or mission depends on people applying creative thinking skill and people leading creative teams. As accountants we have honed our critical thinking skills through our education and our years of practice: we know how to apply critical thinking, mentor it in others and lead critical teams. Now we need to do the same for creative thinking skills.

This workshop is relevant, unique and practical: it is based on the latest creativity techniques; incorporates results from neuroscience and creativity research; focuses on both the skill of fostering creativity and the skill of contributing creatively; and best of all, it is designed and facilitated by an accountant, for accountants.

**KEY LEARNING OUTCOMES**
- Discover your personal creative thinking style through the FourSight Creative Thinking Profile®: are you a Clarifier, an Ideator, a Developer or an Implementer? Learn how to best leverage it and how to engage others to optimize team creativity and results.
- Understand the natural human barriers to creativity and learn how to apply creative thinking principles to push past them.
- Practice new tools and techniques that will enable you to establish stronger success criteria, ask better questions, generate more answers and forge more powerful solutions.
- Understand what creativity means in today’s organizational context and what conditions need to be in place to improve innovation capability.

**WHO SHOULD ATTEND**
This workshop will benefit accountants in any role, level or organization, whether you have complex, enterprise-wide challenges to solve or need to creatively stretch your budget further.

**SEMINAR LEADER/S (see Instructor Bios)**
Samantha Kerr Hurwitz CMA CHRP

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**The Making of a Great Leader**
PD14151041 | Updated

Leaders in every sector are facing overwhelming challenges. Employees are unsatisfied and unfulfilled in their everyday work experience. Staff turnover is running rampant. Mental health challenges in the workplace are costing the Canadian economy $50 billion annually. Short-term financial performance often drives the decisions that are made within the organization.

**WHY IS THIS HAPPENING?**
As new leaders fill the vacant positions, they simply replicate what they’ve observed from those who have left. The traditional model of leadership is designed to get only what you’ve always gotten.

- This leadership approach can be transformed!
- A new leadership philosophy must emerge!

“The Making of a Leader” is a one-day training event which introduces a new leadership mindset. A new paradigm of leadership is presented and a fresh approach to organizational development will be unveiled.

The training modules, “Maximizing Your Leadership Potential” and “Becoming a Great Leader” begin with the big picture of leadership and bring understanding to where change is required. They are designed to inspire you to become the leader that transforms your organization.

The training process “The Making of a Leader” is a doorway to new possibilities for you and the organization where you lead.

**SEMINAR LEADER/S (see Instructor Bios)**
Dr. Steve McEvoy

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November 27, 2014, 9am - 5pm
ICANS Learning Centre
1 Passport Day | 7 PD Hours

March 11, 2015, 9am - 4pm
ICANS Learning Centre
1 Passport Day | 6 PD Hours

For Course Fees, see Pricing Information.
**PROFESSIONAL & PERSONAL SKILLS**

**Time and Priority Management**
PD14151051 | New

"Too much to do and not enough time to do it"

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

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

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

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

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

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**What’s Next: Moving Towards a Purposeful Retirement**
PD14151061 | Reoffering

**OBJECTIVE**
Most people know the imperative of sound investments and financial planning in preparation for retirement. What is often overlooked is the importance of understanding, and making appropriate choices about, the crucial lifestyle, psycho-social issues associated with the transition into a balanced and joyful retirement. This interactive seminar will help you to proactively chart your own course to navigate from the workplace to a full or partial retirement or a fulfilling re-engagement.

**WHO SHOULD ATTEND**
Designed for CAs and other professionals 50+, this seminar helps participants to gain a comprehensive understanding, for themselves and/or for their clients, of all the factors leading to success and fulfillment in the second half of life and retirement.

** CONTENTS TO INCLUDE**
- The 10 success factors of turning retirement into a dynamic re-engagement.
- 21st century life stages and what to expect through the 3 phases of the retirement transition.
- How to assess your readiness to retire.
- Simple rules for investing and generating a sustainable financial future.
- What you must know to avoid common pitfalls of this transition.
- Getting in sync and clarifying expectations with your spouse/significant other.
- Identify workplace accomplishments, current strengths and transferable skills
- Explore new ways to leave a positive legacy at work, in life.
- Neuroplasticity: new findings on what keeps the brain thriving as you age.
- Practical understanding of the foundational Triangle of Wellbeing.
- Examples of people who have achieved a fulfilling re-engagement.
- Create an engaging vision and action plan for your best future.

**BENEFITS OF ATTENDING**
At the end of this seminar you will
- Experience renewed motivation and enthusiasm about making the best of your remaining time at work and taking on succession planning activities in a timely manner.
- Be informed and having reflected on all of the success factors of a satisfying and purposeful retirement/re-engagement.
- Better understand the mixed emotions and competing commitments you may experience while approaching retirement.
- Grasp how you will redefine your purpose and reconfigure your personal identity as distinct from your professional role.
- Know what matters most to you at this stage of life in order to achieve congruence as you plan your future.
- Integrate practices that enhance wellness and longevity and create greater meaning and quality in your life.
- Resolve to retrieve passions and dreams you may have forgotten.
- Replace retirement anxiety with an exciting yet realistic and practical plan.

**SEMINAR LEADER/S (see Instructor Bios)**
Isabelle St-Jean, RSW, ACC

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

November 10, 2014, 9am - 5pm
ICANS Learning Centre
1 Passport Day | 7 PD Hours
When Perfect is Not Good Enough
PD14151071 | Reoffering

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

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

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

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

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

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

Write With Confidence for Professionals
PD14151081 | Reoffering

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

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

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

Taxes are complicated – writing shouldn’t be.

People who have taken this workshop report that they are able to:
• Get their thoughts organized quickly to get off to a fast start
• Use openings that guide the reader to their message
• Shorten and simplify their documents using five key editing techniques
• Know why briefing notes follow the format they do and precisely how they are used
• Understand the technical writing requirements – quick comprehension, clear navigation, completeness and accuracy
• Use four main visual techniques to make their writing more inviting
• The time you spend on this course will soon be recuperated in improved writing speed and clarity. As a bonus, your clients and colleagues will save time, too, as they no longer have to re-read what you’ve written. The class is fun, interactive, and full of practical advice.

After this workshop you will be able to:
• Understand the “Circle of Good Writing”
• Clarify your objectives
• Assess your audience
• Use the “Five Principles of Clarity”
• Write so clearly that your reader gets your message quickly and easily
• To test their application of the principles on the job, participants may send documents to the workshop leader for review after the course.

SEMINAR LEADER/S (see Instructor Bios)
Jon Tattrie

March 4, 2015, 9am - 5pm
ICANS Learning Centre
1 Passport Day  |  7 PD Hours
Writing for the Web Content that Works
PD14151091  |  Reoffering

When potential clients hear about your organization, the first place many go for information is your website. An online presence with confusing writing will also be the last place many potential clients will stay before they seek help elsewhere.

By taking this course, you will learn how to communicate critical information clearly in the style of the internet. Users follow certain habits when they get information from the Web. Learning about these habits and adapting your content to respond to them will make your Web writing much more effective.

PROGRAM CONTENT
• Know how people use the Web so you can tailor your site to their reading habits
• Understand the critical importance of readability and usability
• Analyze the audience you want to attract to your website
• Use the WIIFT (What is in it for them?) principle
• Adapt your written content to maximize its impact online
• Establish authority and credibility
• Set up methods for gathering audience information

PROGRAM BENEFITS
You will learn to
• Write concisely and fit content into a small space
• Put punch into your writing with strong verbs and active voice
• Avoid terms that don’t work well on the Web
• Use microcontent effectively
• Make better use of headings, titles, lists, captions, hyperlinks and other metadata
• Apply design principles for graphics and illustrations
• Employ finding aids to guide your users to the content they need quickly

WHO BENEFITS
Anyone who communicates information and ideas through a website or who supervises content development on a website.

SEMINAR LEADER/S (see Instructor Bios)
Jon Tattrie

March 18, 2015, 1pm - 4pm
ICANS Learning Centre
½ Passport Day  |  3 PD Hours
PUBLIC SECTOR

PSAB 101
PD14151101 | Updated
Level: Intermediate

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

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

LEARNING OUTCOMES
• At the end of this course, participants should be able to:
  • Understand PSAB accounting recommendations
  • Apply PSAB recommendations in the preparation of government financial statements
  • Develop financial reporting in accordance with PSAB

TOPICS INCLUDE
• Financial statement concepts and objectives
• Reporting entities
• Financial reporting
• Investments
• Government partnerships
• Investments in government business enterprises
• Restricted assets and revenue
• Tangible capital assets
• Liabilities, contingent liabilities and contractual obligations
• Long-term debt and leased tangible capital assets
• Changes in PSAB – exposure drafts, discussion papers, transitional provisions
• Overview of GNFPO
• PSAB and ACSB invitation to comment

EMPHASIS PLACED ON:
• Defining the Government Reporting Entity
• Employment benefits
• Government transfers
• Leased tangible capital assets
• Solid waste landfill closure and post-closure liability
• Tax revenue

SEMINAR LEADER/S (see Instructor Bios)
Rob Bourgeois, CA

January 19, 2015, 9am - 5pm
ICANS Learning Centre
1 Passport Day | 7 PD Hours
Advanced Estate Planning for Business Owners
Formerly: Estate Planning for High Net Worth Individuals
PD14151111 | Updated
Level: Advanced

This course offers practical solutions to problems typically encountered when designing and implementing estate plans for high net worth business owners, including business succession, wealth preservation and tax effective distribution.

An integrated case study approach is used to review issues, approaches, and tools, including: trusts, shareholder buy-sell agreements, estate freeze, post mortem pipeline and capital loss carry back planning.

This is not intended to be an in-depth tax course, although much of the planning centres on tax planning and related issues

WHO WILL BENEFIT
This course is suitable for general or tax practitioners with existing experience and understanding of the basics in this area, seeking to expand their knowledge, and members or other advisors seeking to enhance their ability to advise high net worth clients on the more advanced aspects of estate planning.

LEARNING OUTCOMES
At the end the course:
• You will have a better understanding of the tools necessary to design an effective estate plan and how they interact with each other
• You will be able to better identify relevant issues related to business succession, tax minimization and learn how to overcome obstacles in the succession of the estate assets
• You will have an improved or expanded awareness and understanding of specific salient provisions of the Income Tax Act including sections 40(3.6), 55, 70, 73, 75(2), 84, 85, 104, 110.6, 112(3), 164(6)

TOPICS INCLUDE
• Will planning and estate distribution
• Private corporations:
  • Purification and Division
  • Solving the Double Tax
  • Avoiding the loss denial rules
  • The estate freeze
  • Creating the Market – Shareholder Agreements
  • Planning for wealth management and succession using trusts
• Overview of charitable giving strategies and private foundations
• Brief highlights of U.S. estate tax considerations

NOTE
Participants should have a good understanding of personal and corporate tax matters relevant to estate planning, including basic knowledge of life insurance, trusts, estate freezing techniques and estate and succession planning.

SEMINAR LEADER/S (see Instructor Bios)
Greg Leslie, CA

January 27, 2015, 9am - 5pm
ICANS Learning Centre
1 Passport Day | 7 PD Hours

Advanced Tax Planning Strategies
PD14151121 | Updated
Level: Advanced

The seminar begins with a comprehensive review of various anti-avoidance provisions designed to prevent or discourage aggressive tax planning. Topics covered include the general anti-avoidance rule, shareholder benefit provisions, arm’s length relationships, expense deductibility, inadequate consideration, attribution provisions, stop-loss provisions, surplus stripping, association etc.

Various tax planning strategies are presented that are divided into four main categories: restructuring asset profiles, sale of business, use of partnerships and use of trusts. Factual scenarios are provided in the materials that address objectives, statutory provisions, case law, results and risk analysis.

This is an in-depth seminar that moves along quickly due to the volume of topics presented and discussed.

SEMINAR OUTLINE
• Managing tax avoidance risks
• Restructuring asset profiles – important planning strategies
• Business sale planning matters
• Tax planning using partnership business structures
• Tax planning using trust relationships
• Inter-provincial planning (Alberta trusts) – appendix only

WHO WILL BENEFIT
This seminar is ideally suited to practitioners with strong Canadian tax planning backgrounds who wish to add value to existing and potential client relationships by giving consideration to potential tax and estate planning opportunities.

PREREQUISITE
Participants should have a good knowledge of personal and corporate income tax.

SEMINAR LEADER/S (see Instructor Bios)
Matthew Ross, CA

March 2, 2015, 9am - 5pm
ICANS Learning Centre
1 Passport Day | 7 PD Hours
Catching Up: 5 Years of Income Tax Developments
PD14150232 | Updated
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

November 18, 2014, 9am - 5pm
WTCC
1 Passport Day | 7 PD Hours

Corporate Reorganizations
PD14151131 | Updated
Level: Advanced

OBJECTIVE
Your client’s business and personal situation is constantly changing. The existing business structure may no longer be suitable or ideal and your client is looking for tax-efficient alternatives. There are a number of corporate reorganization alternatives that can be implemented under the Income Tax Act. Some of the provisions are complex and often interact with related provisions or anti-avoidance provisions.

This full day seminar highlights the fundamental income tax considerations that arise in corporate reorganizations, including a discussion of related provisions and key pitfalls to avoid. The seminar will use extensive examples to illustrate tips and traps to be aware of when initiating a corporate reorganization.

WHO SHOULD ATTEND
Practitioners or financial executives in industry who have some, but not extensive, experience in share/debt reorganization, consolidation, wind-ups and amalgamations and the GAAR.

Participants in this course may also find the Section 85: Transfer of Property and Advanced Tax Planning Strategies courses beneficial.

BENEFITS OF ATTENDING
At the end of this seminar, participants should be able to review and analyze corporate reorganization alternatives, and to decide which business structure best suits your organization.

CONTENT
• tax-deferred rollovers (other than Section 85)
• wind-ups
• amalgamations
• share exchanges and reorganizations
• anti-avoidance provisions
• convertible securities

SEMINAR LEADER/S (see Instructor Bios)
Steven Moore, CA

January 30, 2015, 9am - 5pm
ICANS Learning Centre
1 Passport Day | 7 PD Hours

For Course Fees, see Pricing Information.
Estate and Probate Planning - Using Trusts Tax-Efficiently
PD14151141 | Updated
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

January 28, 2015, 9am - 12pm
ICANS Learning Centre
½ Passport Day | 3 PD Hours

Everyday Income Tax Issues for the General Practitioner

PD14151151 | Updated
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)
Caroll Vickers, CA (Sydney)

PD14151151 November 18, 2014, 9am - 5pm
WTCC
PD14151152 December 2, 2014, 9am - 5pm
Holiday Inn Harbour Front - Sydney
1 Passport Day | 7 PD Hours
General Practitioners “Need to Know…”
PD14151161 | Updated
Level: Intermediate

There are important income tax issues that a General Practitioner needs to be able to identify but might miss because they do not appreciate the importance of the matter or consider the matter in relevant contexts.

Participants will learn the significance or ramifications of a particular area of tax and how it might apply to common transactions. Participants often find a subject easier to learn and appreciate when they understand the importance of identifying and understanding the issue, and they recognize how an issue may apply in a client situation.

Topics are introduced by setting scenes with common transactions or events before approaching the “need to know” information. Detailed information and commentary will be provided which describes the income tax rules for each “need to know” subject and explains why particular transactions are “caught” or “exposed”. Suggestions will be given on how to be alert to situations where the “need to know” subject is applicable and how to manage and mitigate should a problem arise.

SEMINAR OUTLINE
• Common transactions with shareholder appropriation of corporate assets considerations
• Intercorporate dividends and exposure to taxation as a capital gain
• Individuals selling shares to non-arm’s length companies
• Corporations with family member shareholders and double taxation when corporate attribution applies
• Common situations that may restrict access to the small business deduction
• Stop loss rules encountered in common transactions
• Common shareholder loan concerns
• Other important matters of which a General Practitioner should be aware

PREREQUISITE
Participants should have general corporate and personal income tax knowledge.

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

February 3, 2015, 9am - 5pm
ICANS Learning Centre
1 Passport Day | 7 PD Hours

Getting a Grip on RDTOH, CDA, and Other Tax Accounts
PD14150241 | Updated
Level: Introductory

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

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

WHO SHOULD ATTEND
The seminar will be particularly valuable to anyone involved in tax planning for privately held companies and their shareholders.

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

CONTENT
• basic considerations for all tax accounts
• GRIP
• LRIP
• RDTOH
• CDA
• CEC
• mini cases
• when to seek outside help

SEMINAR LEADER/S (see Instructor Bios)
Kelsi Campbell, CA

October 29, 2014, 1pm - 4pm
ICANS Learning Centre
½ Passport Day | 3 PD Hours

For Course Fees, see Pricing Information.
GST/HST & Real Property
Formerly: GST/HST & Real Property: Tips & Traps
PD14151181 | Updated
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

November 5, 2014, 9am - 5pm
ICANS Learning Centre
1 Passport Day  |  7 PD Hours

GST/HST Issues for the Non-Profit Sector
PD14151191 | Updated
Level: Intermediate

OBJECTIVE
The non-profit sector covers a wide spectrum of activities including clubs and professional associations, schools, hospitals, supportive housing and health services and other charitable works. The application of GST/HST to these activities and its recovery through rebates and input tax credits is usually far more complex than in a commercial enterprise and may vary significantly depending on the legal form of the organization. Failure to be aware of these complexities can result in lost opportunities or worse, large tax assessments against the organization.

This seminar will focus on the unique rules applicable to public service bodies, including the distinction between charities and other non-profit organizations. While reference may be made to other exemptions which may apply to some non-profit organizations, such as health care or education, these will not be examined in detail. The course will also briefly examine issues related to the construction of housing and similar property by non-profit organizations.

WHO SHOULD ATTEND
Persons involved in the accounting for non-profit organizations including directors, general practitioners or other advisors who are responsible for, or provide advice on financial matters to, such organizations.

BENEFITS OF ATTENDING
At the end of this one day seminar, attendees will have a greater awareness of the application of GST/HST and exempting provisions including common pitfalls and errors.

CONTENT
• brief review of GST/HST basics including relevant GST/HST place of supply rules
• review of issues related to grants, donations and fund-raising activities
• review of GST/HST exemptions unique to public service bodies (other than municipalities)
• GST/HST rebates and input tax credit entitlements
• GST/HST registration and accounting
• review of common pitfalls & errors

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

January 20, 2015, 9am - 5pm
ICANS Learning Centre
1 Passport Day  |  7 PD Hours
TAX

GST/HST Refresher for Professionals
PD14150252 | Updated
Level: Intermediate

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

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

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

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

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

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

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

November 21, 2014, 9am - 5pm
WTCC
1 Passport Day | 7 PD Hours

Income Splitting
PD14151201 | Updated
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

January 28, 2015, 1pm - 4pm
ICANS Learning Centre
½ Passport Day | 3 PD Hours

For Course Fees, see Pricing Information.
Income Tax Issues Dealing with Real Estate
Formerly: Tax Issues in Real Estate: What Do You Need to Know?
PD14151211 | Updated
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

November 4, 2014, 9am - 5pm
ICANS Learning Centre
1 Passport Day | 7 PD Hours

Income Tax Planning Refresher for Personal Tax
PD14151221 | Updated
Level: Intermediate

This refresher seminar is ideal for those participants who desire to renew their knowledge in personal tax, trusts and partnerships. At the end of the two days participants should have a good understanding of the taxes and some planning opportunities relating to individuals, partnerships and trusts.

SEMINAR OUTLINE
• How to research a tax issue
• Determination of residency
• Liability for taxes in Canada
• Administrative issues
• Employment income
• Benefits and related deductions
• Calculations of the various sources of investment income
• Taxation of capital gains
• Capital losses and the impact of the stop loss rules
• Allowable business investment losses
• Attritions rules
• Registered retirement pension plans
• RRSP’s
• Individual pension plans
• Deferred plans such as TFSA, RESP and RDSP
• Rental and farm income
• Treatment of shareholder loans
• Various deductions from net income such as the capital gains exemption
• Calculation of taxes payable, including discussions on tax credits
• Taxation of partnerships
• Death of a taxpayer
• Taxation of family trusts

WHO WILL BENEFIT:
Those involved in personal tax matters who wish to expand or refresh their knowledge in the area of personal tax.

PREREQUISITE
Participants may wish to first take the seminar Tax Returns: Personal on page 78 or should have equivalent experience in preparing personal tax returns.

For e-learning session, see page 88.

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

October 23 -24, 2014, 9am - 5pm
ICANS Learning Centre
2 Passport Days | 14 PD Hours
**Income Tax Update**

**New**  
**Level:** Intermediate

This course provides a detailed summary of tax law changes in the past year. It examines current changes and relevant issues in taxation that affect individuals and most businesses in the private sector. Learn how the current levels of personal and corporate tax rates affect and possibly change accepted tax planning techniques. A review of the current integration of personal and corporate tax rates is provided.

The proposals from the Federal Budget, as well as other sources of information from the Department of Finance and the CRA, including news releases, draft legislation, CRA technical interpretations and tax cases, are discussed together with other particular subjects of current relevance and interest.

**WHO WILL BENEFIT**  
Professional accountants who need current information to advise clients, deal with the CRA, and expand their knowledge on timely taxation issues.

**LEARNING OUTCOMES**  
You learn to deal with the day-to-day issues and to identify areas that may require further investigation. After completing this course, you are able to provide current tax advice and prepare federal personal and corporate income tax returns with knowledge of recent developments.

**TOPICS INCLUDE**  
- Tax rate changes/integration  
- Federal Budget  
- Information from CRA and Dept. of Finance  
- Tax cases  
- CRA technical interpretations  
- Provincial/Territorial Update  

**SEMINAR LEADER/S (see Instructor Bios)**  
John Oakley, CA, TEP, CC  
Sheila Gillis, FCA (Sydney)

**PD14151231**  
October 28, 2014, 9am - 5pm  
ICANS Learning Centre

**PD14151232**  
November 17, 2014, 9am - 5pm  
WTCC

**PD14151233**  
November 19, 2014, 9am - 5pm  
WTCC

**PD14151234**  
November 21, 2014, 9am - 5pm  
WTCC

**PD14151235**  
December 17, 2014, 9am - 5pm  
ICANS Learning Centre

**PD14151236**  
January 13, 2015, 9am - 5pm  
ICANS Learning Centre

**PD14151237**  
December 3, 2014, 9am - 5pm  
Holiday Inn Harbour Front - Sydney

1 Passport Day | 7 PD Hours

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**Income Taxation of Portfolio Investments for Individuals**

**PD14151241 | Updated**  
**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

**PD14151241**  
November 17, 2014, 9am - 12pm  
WTCC

½ Passport Day | 3 PD Hours

For Course Fees, see Pricing Information.
Interest, Penalties and Taxpayer Relief
PD14151251 | New
Level: Introductory

OBJECTIVE
The objectives of this seminar are to review the scheme of penalties and interest in the Act, the CRA’s current administration of those provisions, and the use of the Taxpayer Relief provisions to reduce the cost of penalties.

WHO SHOULD ATTEND
This seminar will be useful for members in public practice with a general practice and for members in industry who are responsible for tax reporting compliance.

BENEFITS OF ATTENDING
At the end of the seminar participants will be able to identify tax reporting requirements which can result in penalties, determine the amount of the penalties, and know if the penalties can be waived under the fairness provisions and what other alternatives are available.

CONTENT
Interest
• Corporate taxes
• Individuals
• GST/HST
• Refund interest
• Interest offset rules
Penalties
• The nature and type of penalties
• Information return penalties
• Income Tax penalties
• Electronic filing penalties
• GST/HST penalties
• GST/HST wash transaction penalties
• Gross negligence penalties
• Payroll, source deduction, and non-resident withholding penalties.
• Foreign reporting penalties.
• Third party penalties.
Taxpayer relief provisions
• Objectives
• When they apply
• How to apply
• Appealing a request
• Due diligence defense
Voluntary Disclosures
• Requirements
• Examples
CRA Administrative Issues

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

February 5, 2015, 1pm - 4pm
ICANS Learning Centre
½ Passport Day | 3 PD Hours

Purchase & Sale of a Business: Income Tax & Related Issues
PD14151261 | Updated
Level: Intermediate

OBJECTIVE
This seminar will provide an understanding of income tax issues with respect to the purchase and sale of a business and will have comments on other issues in a purchase or sale of a business. It is principally oriented to income tax issues and with respect to actual cases. There is a case on family succession, and there is an expanded module on non-tax issues.

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

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

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

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

January 5, 2015, 9am - 5pm
ICANS Learning Centre
1 Passport Day | 7 PD Hours
Restructuring Private Corporate Groups
PD14151271 | Updated
Level: Intermediate

OBJECTIVE
This seminar covers the income tax and GST/HST issues that arise as a result of transactions within a group of related privately held corporations. Issues covered will include sale of assets between group members, and reorganization and restructuring issues.

WHO SHOULD ATTEND
This seminar will be of interest to practitioners and managers involved in reorganizations or tax planning for groups of privately held companies.

BENEFITS OF ATTENDING
At the end of this course the participant should be able to identify the intra-group tax issues in a privately held corporate group and develop solutions to achieve the business objectives in a tax effective manner.

CONTENT
The course will be presented as two large case studies during which participants will:

• identify problems and issues with the current structure
• propose alternative structures to meet the business objective
• walk through the steps, basic documentation required, and issues involved in implementing the solution

It would be beneficial for participants to attend Tax Issues for Private Corporate Groups before attending this seminar.

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

January 29, 2015, 9am - 12pm
ICANS Learning Centre
½ Passport Day  |  3 PD Hours

RIP - Estate Planning to Minimize Tax Leakage
PD14151291 | New
Level: Intermediate to Advanced

This seminar will provide a detailed review of important estate planning matters for practitioners who deal with the owner-managed client. This includes enhanced estate planning skills for the non-specialist practitioner, introduction of important tax and estate planning concepts, and useful tips and an up-to-date reference source. Participants will develop a working understanding of how to initiate and undertake effective estate planning for clients. An important area of the course is to maintain flexibility in the estate plan while managing estate planning risk.

SEMINAR OUTLINE
• Planning for deemed disposition at death
• Post mortem planning
• Planning and using trusts
• The use of life insurance in planning
• US estate tax review
• Case study

WHO WILL BENEFIT
Practitioners who want to assist clients in identifying and addressing estate planning needs for the owner-manager or high net worth individual.

PREREQUISITE
Participants should have significant experience in the area of domestic estate planning and should have a good understanding of the testamentary tax rules.

SEMINAR LEADER/S (see Instructor Bios)
Ruth March, CA, TEP

January 26, 2015, 9am - 5pm
ICANS Learning Centre
1 Passport Day  |  7 PD Hours

For Course Fees, see Pricing Information.
RIP - Tax Compliance Matters Related to Terminal Filing Preparation
PD14151281 | Updated
Level: Intermediate to Advanced

This seminar will provide a detailed technical review of the numerous issues faced when preparing terminal (year-of-death) filings. The focus is return preparation and general estate planning, including: review of relevant tax issues, engagement management, up-to-date source of relevant tax research, review and understand CRA assessing practices, and strengthening estate planning skills.

This seminar will greatly enhance participant’s knowledge in the area of preparing and planning for terminal filings as well as technical skills for general estate planning.

SEMINAR OUTLINE
• Engagement management
• Tax filings on death
• Detailed compliance issues
• RRSP and deferred income plan rules
• General compliance areas
• Testamentary trust review
• Estate accounting
• GST matters
• Case study

WHO WILL BENEFIT
Practitioners who complete individual terminal filings and who are interested in understanding basic estate planning strategies.

PREREQUISITE
Basic tax knowledge is recommended.

SEMINAR LEADER/S (see Instructor Bios)
Ruth March, CA, TEP

November 14, 2014, 9am - 5pm
ICANS Learning Centre
1 Passport Day | 7 PD Hours

Scientific Research & Experimental Development Tax Credits
PD14151301 | Updated
Level: Intermediate

OBJECTIVE
The Scientific Research and Experimental Development Program (SR&ED) provides federal tax credits of over $3.6 billion a year to companies researching in the field of science and technology. Most provinces also provide SR&ED tax credits, some of which exceed the federal incentives. The SR&ED program is administered by the Canada Revenue Agency (CRA) and requires a collaborative process between technology researchers, to define and document relevant activities, and financial/tax personnel, to claim the appropriate costs for credits. In recent years, many changes have been made to the program and most claimants will find that their benefits will be reduced year over year. This updated course provides detailed information about the legislative changes, the potential impact on claims, and planning to ensure that maximum benefits are achieved.

This practical seminar will provide the information you need to advise your clients or your company and to guide them through the documentation and claim process as well as CRA reviews.

WHO SHOULD ATTEND
Accountants in public practice or industry (all levels), R&D project managers and researchers in a field of science or technology.

BENEFITS OF ATTENDING
At the end of this course, you will have a good grasp on the SR&ED program and recent updates including both the financial and technical documentation required to compile and defend an eligible claim.

CONTENT
• an overview of the “technology” eligibility criteria
• introduction to documentation requirements
• discussions of the eligible costs – including areas where judgment is required
• summary of significant tax court precedence set during the past 20 years
• case study, including completion of all related tax forms

The course has been updated to include the changes to legislation and administrative policies up to July 15, 2014. It uses a case study format to work through preparation of a claim.

SEMINAR LEADER/S (see Instructor Bios)
Martha Oner, B.Sc.

February 25, 2015, 9am - 5pm
ICANS Learning Centre
1 Passport Day | 7 PD Hours
Tax Decisions With Long Term Implications for the GP
PD14151311 | Updated
Level: Intermediate

This full day seminar addresses tax issues common to practitioners in general practice. The focus will be on identifying tax decisions that have long-term implications. Planning opportunities will be highlighted so that general practitioners may use the seminar materials to help identify tax issues for their clients.

The seminar focuses on issue identification rather than the technical aspect of the tax laws.

SEMINAR OUTLINE
• Shareholder agreements
• The “stop-loss rules” on redemption of shares
• Acquisition of control
• Debt forgiveness
• Planning for the use of losses
• Allowable business investment losses
• Holding companies - advantages and disadvantages
• Estate planning
• Estate freezes and refreezing techniques
• Taxation of the owner/manager upon death
• Owner manager retirement planning
• Use of trusts

WHO WILL BENEFIT
This seminar is best suited for general practitioners who have a basic knowledge of tax matters and who provide professional services to owner-managed small businesses.

SEMINAR LEADER/S (see Instructor Bios)
Duncan Ferguson, CA

November 19, 2014, 9am - 5pm
WTCC
1 Passport Day | 7 PD Hours

Tax for Controllers
PD14151321 | Updated
Level: Introductory to Intermediate

OBJECTIVE
This course will help controllers of private companies stay current on a broad array of tax and related compliance issues. Items will be covered at a general level with specific examples, cases and practical problems. References to more detailed sources are provided.

WHO SHOULD ATTEND
Anyone whose responsibilities include tax and related compliance issues, retaining tax professionals, and managing the business tax strategies for privately owned businesses. The seminar will benefit controllers who are new to the position and experienced controllers and financial managers who would like a refresher on key compliance items. Although the focus of the course is privately held companies, many of the topics covered could also be applicable to public companies. Less than half of the material would be applicable for not-for-profit enterprises. This seminar could also benefit practitioners who provide advice in these areas.

BENEFITS OF ATTENDING
Small, growing, and mid-sized companies face a broad array of tax and related compliance issues. The penalties or tax costs of failing to meet these compliance requirements can be severe. Without an in-house tax department, the responsibility for these areas falls on the controllers. This seminar provides a comprehensive review with examples to common problem areas. This seminar will help controllers stay current on a broad range of tax and related compliance issues.

CONTENT
• human resources - payroll and withholdings, employee benefits, non-taxable benefits, casual employees
• automobiles
• sales issue - GST/HST, export issues, revenue recognition
• purchasing issues - GST/HST, purchases from non-residents, deductibility
• capital assets - GST/HST, capitalization vs. expense, CCA, change of use
• financing issues - lease vs. buy, interest deductibility, related expenses
• structural issues - alternative structures, related corporate group issues, small business deduction, taxable capital
• other compliance issues - filing requirements; interest and penalties; director’s liability, dealing with non-residents; contractor reporting
• audits and appeals

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

December 8-9, 2014, 9am - 5pm
ICANS Learning Centre
2 Passport Days | 14 PD Hours
**Tax Issues for Private Corporate Groups**

**PD14150271 | Updated**
**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 taxations issues that apply to groups of privately held companies and their shareholders.

**CONTENT**
- basic related, associated, and affiliated rules
- the rules that modify the associate rules
- the results of associating corporations
- approaches to avoid association
- timing issues
- domestic transfer pricing
- use of trusts and partnerships in the group
- GST/HST issues
- loss utilization and the stop-loss rules

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

October 29, 2014, 9am - 12pm
ICANS Learning Centre
½ Passport Day | 3 PD Hours

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**Tax Issues in Shutting Down a Corporation**

**PD14151341 | New**
**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 Boutillier, CA

January 29, 2015, 1pm - 4pm
ICANS Learning Centre
½ Passport Day | 3 PD Hours
Tax Planning for Private Enterprises on Business Succession
PD14151351 | Updated
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

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

Tax Returns - Corporate
PD14151361 | Updated
Level: Introductory

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

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

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

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

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

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

SEMINAR LEADER/S (see Instructor Bios)
Brad Olsen, CA

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

For Course Fees, see Pricing Information.
Tax Returns - Personal  
PD14151371 | Updated  
Level: Introductory  

This seminar provides participants with a broad overview of the income tax provisions which can impact taxpayers filing their personal tax returns. Participants will gain an overall understanding of tax compliance and planning issues, enhancing their ability to identify and address planning opportunities which arise in the preparation of personal income tax returns. The seminar materials provide greater depth of discussion, particularly in more complex areas or areas less frequently encountered in practice, and are intended as an ongoing reference source for participants.

SEMINAR OUTLINE  
• Liability for tax  
• Employment income  
• Retirement income  
• Income from property  
• Income from business  
• Capital gains and losses  
• Other income and deductions  
• Personal tax credits  
• Computation of tax  
• Administration and disclosure  
• Provincial issues  

WHO WILL BENEFIT  
Practitioners with regular involvement in this area have indicated the seminar is a valuable refresher and update, addressing matters they encounter in their day to day practices.

Those who have been away from personal taxes for some time will gain an understanding of the issues which may arise in personal tax return preparation.

PREREQUISITE  
Experience with personal tax returns is beneficial, but not essential.

NOTES  
This seminar deals in conceptual issues, and does not deal directly with the layout of the tax return or the forms and schedules utilized in preparation of such returns.

The course is structured to focus on issues encountered in general personal tax practice. More complex and specialized areas, such as taxation of non-residents, taxation of deceased persons and specialized sectors such as insurance and the resource sector, are beyond the focus of this seminar.

SEMINAR LEADER/S (see Instructor Bios)  
Diana Walsh, CA  

November 20, 2014, 9am - 5pm  
WTCC  
1 Passport Day | 7 PD Hours  

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Taxation of Domestic Family Trusts - Advanced  
PD14151381 | Updated  
Level: Advanced  

OBJECTIVES  
This seminar focuses on advanced issues and concepts relating to inter vivos trusts, testamentary trusts and estates with an emphasis on planning concepts and strategies. Participants will gain an enhanced knowledge concerning the use and planning aspects pertaining to trusts as well as the potential tax problems associated with the use of trusts in business structures.

WHO SHOULD ATTEND  
The seminar will appeal to participants who are familiar with the taxation of domestic trusts and who wish to expand their knowledge of the use of trusts in tax planning and to be aware of the pitfalls to be avoided.

Practitioners wishing to obtain a comprehensive knowledge should consider taking the set of Taxation of Domestic Family Trusts courses starting with the Basic, then the Compliance, and finally the Advanced course.

CONTENT  
• Non-tax reasons for using trusts  
• Tax planning considerations including income splitting and capital gains splitting  
• Tax traps such as “kiddie tax” and attribution rules  
• Reversionary trusts  
• Problems created by using trusts  
• Estate planning and considerations  
• Testamentary spousal trusts  
• 21-year deemed disposition rule and various ways to avoid the problem  
• Other planning considerations  
• Post-mortem tax planning  
• Audit proofing your client  
• Trust applications including inter vivos trusts:  
  • Testamentary trusts  
  • Asset protection trusts  
  • Fixed interest trusts  
  • Capital appreciation trusts  
  • Reversionary trusts  
  • Cottage trusts  
  • Charitable remainder trusts  
  • Alter-ego trusts  
  • Joint spousal and common-law partner trusts  
  • Lifetime benefit trusts  
  • Successive trusts  
  • Tainted spousal trusts  
• Detailed practical examples to highlight key concepts  

SEMINAR LEADER/S (see Instructor Bios)  
Kate Harris, LLB  

March 3, 2015, 9am - 5pm  
ICANS Learning Centre  
1 Passport Day | 7 PD Hours
Taxation of Domestic Trusts - Compliance  
PD14151391 | Updated  
Level: Advanced  

OBJECTIVE  
The focus of this course is the preparation of T3 returns for Canadian domestic trusts. The course includes an overview of the legal principles that govern the trust relationship, the constraints these impose on tax planning and the categories of trust that are most commonly distinguished for income tax purposes - inter vivos, testamentary and spousal - and the differences in how they are taxed.

WHO SHOULD ATTEND  
The course will be of interest to students and new CAs who have limited experience in preparing T3 returns and to more seasoned practitioners looking to refresh their knowledge, particularly of less commonly encountered transactions.

BENEFITS OF ATTENDING  
At the conclusion of the course, participants should understand how to report basic trusts transactions on a T3 return. In addition, participants will know how to account for some of the special transactions that affect trusts and how these are reported on the T3 return.

CONTENT  
• Overview (basic legal principles)  
• Types of trusts and their taxation (how trusts are categorized for income tax purposes)  
• Completion of the identification section of the T3  
• Determination of income (review of the various types of income that a trust can have and how the determination of income differs between a trust and an individual)  
• Taxation of trustee fees in the hands of the trustee  
• Case study – entering basic trust transactions (deemed and actual capital dispositions, dividend income, trustee fees, income allocations)  
• Case study – basic testamentary trust (special issues that arise in the first year of an estate, including application of the Executor’s Year strategy)  
• Case study – testamentary trust transactions (wind up of a spousal trust, including claiming the principal residence exemption and utilizing the deceased spouse’s capital gains deduction)  
• Case study – family trust (reporting income splitting and capital gains allocations)  
• The course format is lecture and presentation with case studies. Because of their complexity, the case studies will not be prepared in class. Rather, the facts underlying the case studies will be reviewed and the solutions will be presented.

SEMINAR LEADER/S (see Instructor Bios)  
Greg Leslie, CA  
February 12, 2015, 9am - 5pm  
ICANS Learning Centre  
1 Passport Day | 7 PD Hours

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Taxation of Employee Benefits  
PD14151401 | Updated  
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  
November 17, 2014, 1pm - 4pm  
WTCC  
½ Passport Day | 3 PD Hours

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For Course Fees, see Pricing Information.
U.S. Taxation of Individuals - Basic  
Formerly: Basic U.S. Taxation of Individuals  
PD14150222  |  Updated  
Level: Introductory

OBJECTIVE
This seminar will provide a basic understanding of U.S. individual income taxation of U.S. citizens, residents and non-resident aliens of the U.S. This is an entry level course which will discuss Federal filing requirements of U.S. citizens, residents and non-resident aliens. There will be a discussion on the U.S. taxation of the rental and disposition of U.S. real estate for non-resident aliens. Case studies and discussions will also be included. State tax issues and real estate acquisition strategies will NOT be covered.

WHO SHOULD ATTEND
The seminar is designed for practitioners who want to gain a basic understanding of U.S. taxation for individuals and to assist with the preparation of basic U.S. tax returns.

BENEFITS OF ATTENDING
Participants will gain an understanding of U.S. tax filing requirements. The course material will include useful references. Mini cases studies will be used to illustrate concepts under each topic.

CONTENT
• tax classification and residency status tests  
• taxation of resident and non-resident aliens  
• general discussion of the Canada – U.S. income tax convention  
• transactions involving the purchase and sale of U.S. real estate by non-residents  
• gambling winnings and losses  
• case studies

NOTE
Topics such as voluntary disclosure for delinquent filers, foreign earned income exclusions, foreign tax credits, alternative minimum tax, principal residence, foreign pension plan, expatriation tax, estate & gift taxes, cross border taxation of U.S. entities are covered in separate courses - U.S. Taxation of Individuals - Intermediate and U.S. Taxation of Individuals - Advanced.

SEMINAR LEADER/S (see Instructor Bios)
Jason Hale, CA

November 20, 2014, 9am - 5pm  
WTCC  
1 Passport Day  |  7 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.

DAVID BAKER, CPA, CA earned his professional designation in 1981, earning an award as a top UFE writer in the Waterloo Region. In 1983 he began his own public accounting practice in Elmira, Ontario serving local small and medium-sized owner-managed businesses. After 21 years as a sole practitioner, Dave retired and now devotes his time to professional development activities. He has taught CA finalist students at the ICAO School of Accountancy annually since 1984 and has written a case study for use in that program each year since 1988. In addition to teaching part-time at the University of Waterloo for 12 years, Dave has presented a number of other courses to CAs and CA students.

KATRINA BEACH, CA, CPA (IL) is a partner in assurance at Grant Thornton and is the markets leader for Nova Scotia. She has served as the a co-leader of the Atlantic construction, real estate and hospitality sector for Grant Thornton and has considerable experience providing audit services to clients in this industry. Katrina graduated from Dalhousie University with a bachelor of science, and is a member of the Institute of Certified Public Accountants of Nova Scotia, the Canadian Institute of Chartered Accountants and the Illinois Institute of Certified Public Accountants. Katrina has significant experience conducting complex assurance engagements in many sectors, including real estate, construction, health care, not-for-profits, universities, government business enterprises and financial services.

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.

BLUTEAU DEVENNEY - Strategy. Leadership. Performance. These are the cornerstones of Bluteau DeVenney’s approach to helping business and organizations maximize their potential through their people. Established in 1999, Bluteau DeVenney offers an innovative mix of analytical assessments, consulting, and training to help companies identify opportunities, then design strategies, solutions, and performance metrics to achieve best results. It is Bluteau DeVenney’s vision to empower organizations and their people with confidence to realize their advantages and succeed in an increasingly competitive marketplace. The company’s consultants are Michael DeVenney, Jamie O’Neill, Wayne Woodard and Lisa Tilley.

BOBBY BOUTILIER, CA is a Tax Manager 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.

ROB BOURGEOIS, CA is the Director of Financial Accounting with the NS Department of Finance and Treasury Board. He is responsible for providing public sector financial accounting support to government departments and overseeing the preparation of the Province’s Consolidated Public Accounts. He has presented numerous public sector topics to various groups within the Province. He has been with the Province for just over five years and has extensive experience in the interpretation and application of Public Sector Accounting Standards (PSAS). Prior to joining the Province, Rob worked with KPMG in Halifax for 7 years.

DAVID CAMERON, CA is a Senior Manager in Deloitte & Touche LLP’s Halifax Tax Group. He has over fifteen 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.

KELSI CAMPBELL, CA graduated with a BComm from Saint Mary's University in 2009. She joined Grant Thornton after graduating and obtained her CA designation in 2011. She is a Tax Manager with Grant Thornton’s Halifax office and is responsible for the provision of corporate and personal tax services for a wide variety of the firm’s clients, with emphasis on owner manager businesses. Experience includes corporate and personal tax planning, estate and succession planning, reorganizations, and trusts.

JEFF CHRISTIAN, CA is a Wealth Advisor with the Harwood Group 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 and the CICA Income Tax Practice Course.

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 Atlantic School of Chartered Accountancy. In recent years, he has fulfilled the CFO role in a number of privately held and publicly traded entities.
TAMMY CROWELL, CA, MBA is an instructor and case leader for the Atlantic School of Chartered Accountancy. Tammy has marked the Uniform Final Evaluation since 1996 and provides UFE training services to many CA students on a regional and national level. Tammy is also presently employed as a full time instructor at Dalhousie University in the School of Business. For many years, Tammy has instructed professional development courses for ICANS.

KIM DAY, CA is the VP Finance at Newfoundland Capital Corporation Limited (TSX: NCC.A, NCC.B) which operates Newcap Radio, one of Canada’s leading radio broadcasters with 91 licences across Canada. Having worked for Newcap for over 10 years, she is responsible for public reporting, corporate taxation, internal controls, valuation, and corporate governance. Prior to joining Newcap, Kim worked in public practice for over 8 years providing audit advisory services working with clients in a wide variety of industries.

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.

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

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

MAUREEN GILLIS, CA an experienced CA with strong leadership, motivation and coaching skills who enjoys challenges, teaching, learning, and excels at strategic thinking, and relationship building. She had 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.

SHEILA GILLIS, FCA is a Tax Partner with MGM & Associates, Sydney. She has presented training programs and seminars on various taxation topics to staff as well as to clients and the business community. Sheila has presented the ICANS’ Tax Update Course in Sydney since 1995.

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KATE HARRIS, LLB is a Tax Partner with Patterson Law; she has practiced in the following areas: Taxation, estate planning and trusts, business law, professional corporations, the purchase and sale of businesses, corporate reorganizations, succession planning for the owner-manager.

KATE HORNE, CA is the Manager of Fiscal and Economic Affairs with the Department of Energy, prior to taking this role she was a Senior Manager with KPMG and Deloitte & Touche LLP. She has 11 years of public accounting experience providing assurance and advisory services to private and public companies. She has significant experience in providing complex accounting assistance and advice including IFRS, ASPE, PSAS and NFPO’s, conversion services, regulatory reporting and public offerings.

VERONICA HUNT, CA is an Audit Senior Manager with Grant Thornton’s Nova Scotia Business Unit with 8 years of public accounting experience. Veronica is responsible for the provision of audit and advisory services with experience in a variety of clients and industries with a primary focus on audits of public companies.
Allan specializes in working with public companies. In addition, he is a principal with WBLI Chartered Accountants, Halifax, and the authorized trainer of CaseWare products for Atlantic Canada. He brings with him extensive product knowledge and experience helping public practitioners, corporate entities, and government organizations implement CaseWare and CaseView solutions. Terry practices in assurance and advisory services at WBLI with a wide variety of owner-managed clients. With an information technology background, Terry has significant experience helping clients resolve their accounting and reporting needs. He was worked with a variety of industries including manufacturers, wholesalers, retailers, construction, professionals, and not-for-profit organizations.

Allan Jenkins, CA, CPA (IL) is a partner in the Assurance Group of PwC, working, working in the Halifax office. Allan specializes in working with public companies. In addition to providing audit and assurance services, he offers advice on implementing new accounting standards and assists with acquisitions and divestitures. Allan has extensive experience with both Canadian and US listed companies, including public equity and debt offerings. As PwC’s IFRS leader in Nova Scotia, Allan also has considerable experience in working with clients who are reporting under IFRS. Allan has helped numerous clients through initial adoption of IFRS and on-going reporting under IFRS.

Vijay Jog, Ph.D., is the Founder and President of Corporate Renaissance Group (CRG) - a global firm that specializes in improving enterprise performance through innovative solution. Dr. Jog is a consultant to many government departments, crown corporations, and private sector firms around the world. His area of expertise covers value based management, executive compensation, ABC/ABM and designing of enterprise performance platforms. He is also a Chancellor Professor at Carleton University where he teaches corporate finance and value based management at the Sprott School of Business. He is a recipient of many national and international awards including the Moulton Gold Medal and has been recognized by National Post as a “Leader in Management Education” in Canada. He has published over 100 research papers and books/monographs. He is a chemical engineer with M.Eng., MBA and a Ph.D. in finance from McGill University.

Kristina King, CA graduated with a Bachelor of Business Administration with Honours from Acadia University before articling with KPMG in Calgary where she obtained her designation. Kristina has worked in Calgary, Australia, and has recently returned to Halifax where she is a Manager with KPMG’s audit practice. Her primary client base is the investment industry and not for profit sector. She has seen multiple entities through framework transitions within all sections of the handbook. Kristina has worked with the Chartered Accountancy School of Business (CASB) since qualifying.

Gerry Lacroix, CA is an assurance partner with Grant Thornton's Halifax office with close to 20 years of public accounting experience. He is responsible for the provision of assurance services for a wide variety of the firm’s clients, with emphasis on not-for-profit organizations and owner managed businesses. Gerry is also the leader of Grant Thornton's not-for-profit sector focus in the province of Nova Scotia and has served as a volunteer on the executive committee and board of directors for Hockey Nova Scotia since 2003.

Trisha leBlanc, CA, CPA (IL) is the Regional Quality Advisor, Atlantic Canada at Grant Thornton where she is responsible for helping engagement teams and clients analyze complex accounting and auditing matters. Prior to joining Grant Thornton, Trisha spent 13 years with KPMG, most of that time spent in Europe working with IFRS clients. Immediately prior to joining Grant Thornton, Trisha was a consultant working with GAAP Seminars, responsible for the design, development and presentation of accounting training courses focused on IFRS and US GAAP.

Wanda Leese, CA is a principal with WBLI Chartered Accountants, specializing in accounting, assurance, and business advisory services. Wanda’s clients include owner managed businesses and many not-for-profit organizations. In addition, Wanda is part of the team that ensures the firm is in compliance with professional standards, including quality control standards. She is a member of Governing Council for ICANS, and has served on the Professional Standards Review committee, as well as a CICA task force for Assistance to the Standard Setting Process.
INSTRUCTOR BIOS

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

EARL MACLEOD, CA is a Partner with WBLI 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.

CHRIS MACPHEE, CA joined WBLI Chartered Accountants in 2006 and obtained his CA designation in 2009. He is a Manager with WBLI and practices primarily in the audit and assurance area, servicing a wide variety of medium to large size clients, including owner managed businesses, professionals, non-profit organizations, manufacturers, retailers, investment holding companies and information technology companies.

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 Course 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 planning for a diverse clientele, with a particular understanding of the income tax issues relating to owner-managed businesses, estates and trusts. In 2000-2001 Ruth worked with Maritime Life as an Estate and Tax Planning consultant. She has been a tutorial leader for CICA tax courses and a lecturer for the Canadian Tax Foundation. She is currently a deputy chair of STEP Canada and treasurer of the Community Foundation of Nova Scotia, and is a past governor of the Canadian Tax Foundation.

RUTH MARCH, CA, TEP is a Director of Estate Planning with KPMG in Halifax. She joined KPMG after graduating from Mount Allison University in 1983. She is responsible for tax planning for a diverse clientele, with a particular understanding of the income tax issues relating to owner-managed businesses, estates and trusts. In 2000-2001 Ruth worked with Maritime Life as an Estate and Tax Planning consultant. She has been a tutorial leader for CICA tax courses and a lecturer for the Canadian Tax Foundation. She is currently a deputy chair of STEP Canada and treasurer of the Community Foundation of Nova Scotia, and is a past governor of the Canadian Tax Foundation.

STEVEN MOORE, CA is a Tax Partner with KPMG LLP; he provides a full range of taxation services to a wide variety of Canadian private and public clients in many industries. These services include Canadian personal and corporate compliance and planning, corporate reorganizations, etc. Steven has also been actively involved with the CICA In-Depth Tax Course from 1999 to 2007 and has been a lecturer for ICANS tax courses from 2006 to present.
INSTRUCTOR BIOS

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 as 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.

JOHN OKEY, CA, TEP, CC qualified as a Chartered Accountant in 2001 with a National firm in Kentville, Nova Scotia after completing a Bachelor of Commerce degree from Saint Mary’s University in 1997. He joined Collins Barrow tax group in 2001. Since then he has completed all three CICA in-depth tax courses; as well as, the CICA Advanced Tax Issues for the Owner-Managed business. He became Tax Partner in 2008 and is currently managing Collins Barrow’s Atlantic tax group (both Canadian and US). He has widespread knowledge and expertise in the area of corporate and personal income taxes specializing in the area of corporate reorganizations, estate planning, succession planning and US personal and estate tax. John has written and presented published papers for The Canadian Tax Foundation, The Society of Trusts and Estate Practitioners, Real Estate Lawyers Association of Nova Scotia, and Collins Barrow quarterly newsletter. John has also taught various Income Tax courses for St. Mary’s University, CICA, ICANS, and ASCA.

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

MARTHA ONER, B.Sc. leads the National Tax Incentives practice at Grant Thornton where she specializes in SR&ED and Digital Media tax credit claims. For the past 13 years she has filed across medical/pharma, manufacturing, agriculture, construction and information technology. A graduate of University of Waterloo’s honors Science and Business program, she has an in depth knowledge of SRED claim preparation, review and eligibility. At Grant Thornton, we help dynamic organizations unlock their potential for growth by providing meaningful, actionable advice through a broad range of services. Over 31,000 Grant Thornton people, across 100 countries, are focused on making a difference to clients, colleagues and the communities in which we live and work.

EILEEN PEASE, BA, B.ED., M.ED., CHRP. When was the last time you gave your brain a tune-up? Most of us spend more time and money on tuning up our cars or our bodies than on our most precious possession – our brain. Eileen has 25 years experience teaching many courses related to thinking and interpersonal skill in the workplace. Recently she tapped into the most up to date knowledge on brain research to write a book called “Get More Power from Your Brain”. Eileen knows how to help you get the most value out of your own creativity, thinking, reading time, concentration, and memory.

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

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.

STEPHEN PRIDDLE, CPA, CA, CMA worked with KPMG for five years, then moved to industry and has worked for several companies, including public and private companies in the high technology sector. During this time, he has obtained a wide range of financial reporting, treasury management, merger & acquisition and other business experience. He is currently the Vice-President, Finance and Corporate Secretary of SureWx Inc. Stephen has extensive experience in teaching professional development and other courses for different provincial institutes and has taught at the University of Toronto and Carleton University, as well as in the CMA and CGA programs.
INSTRUCTOR BIOS

TAMMY ROBERTSON, MA in Physical and Health Education from the University of Western Ontario has over 25 years of corporate and entrepreneurial experience. As a life and leadership coach, author and professional speaker, she inspires and challenges audiences to step into their true potential. Tammy believes that the essence of our challenge today is captured in one simple message, Get Your Heart in the Game™... Engagement is Emotional! She is also a Founder of RealTalk, a global community committed to improving communication and relationships one real talk at a time.

MATTHEW ROSS, CA a Senior Manager with Grant Thornton LLP’s Nova Scotia Business Unit. He has specialized in tax for more than ten years with a focus on owner-managed businesses and their shareholders. Matt advises the firm’s corporate and personal tax clients on compliance matters and planning opportunities, and has experience with corporate reorganizations, trusts, and non-resident issues.

ISABELLE ST-JEAN, RSW, ACC is a Registered Social Worker, Associate Certified Coach (accredited by International Coach Federation), Certified Retirement Coach, professional speaker and facilitator, and author of Living Forward, Giving Back: A Practical Guide to Fulfillment in Midlife and Beyond. Through one-on-one sessions and/or seminars she has helped hundreds of people to successfully navigate major life transitions including career change and retirement. Building on her background in psychology and social work, Isabelle has completed graduate studies in Authentic Leadership at Naropa University in Boulder, Colorado. She has initiated two award-winning and best-selling anthologies: Einstein’s Business: Engaging Soul, Imagination and Excellence in the Workplace, which she also co-authored, and Audacious Aging.

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.

JEFFREY SHERMAN, BCOMM., MBA, FCSI, FCPA, FCA (Ontario), is CFO of Atrium Mortgage Investment Corporation (TSX:AI) and a popular writer and speaker, who has had extensive experience as a corporate director and chief financial officer. His interests include corporate governance, risk management and internal control, corporate finance, restructuring and start-up enterprises. Jeffrey has lectured and conducted seminars for many organizations, and was an adjunct professor at York University. He has written many magazine articles as well as over 20 books, including Cash Management Toolkit for Small & Medium Businesses, published by the CICA.

LAURA SIMEONI, CPA, CA, CIA is a self-employed Professional Development and Education consultant practising primarily in Ontario. Laura teaches professional development courses as well as a student training program for The Institute of Chartered Accountants of Ontario. She also teaches for a professional development consortium where she trains students entering the CA profession. She has taught at the Ontario School of Accountancy for over twenty years and is involved with preparing students for their professional examinations. She is currently employed as a part-time instructor for Schulich School of Business at York University. Formerly, Laura worked on a full-time basis for one of her clients - RBC – Internal Audit where she assumed the role of Director- Professional Audit Standards. Laura earned her Certified Internal Audit designation and was instrumental in the application process for the training of CA students. Laura has edited an accounting textbook and co-authored the “Guide to Preparing Financial Statements”.

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 is a Tax Associate in the tax group of WBLI 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, trusts and 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.

JON TATTRIE was recruited by veteran Dynamic Learning teacher Barry Boyce to continue his work training professionals to write clearly and effectively. Jon has spoken about writing at the University of King’s College and Dalhousie University, as well as to students across the province via the Writers in the Schools program. He is the award-winning author of one novel and three non-fiction books and has won three Atlantic Journalism Awards (silver). He is a consultant for Pottersfield Press and an editor for the Canadian Encyclopedia. He writes for Reader’s Digest, Canadian Geographic, Saltscapes, the Chronicle Herald, Progress Magazine and many others. He also works for CBC as an online, radio and TV journalist. Jon is a former vice-president of the Writers’ Federation of Nova Scotia.
MATT TOTTEN, CA is a Senior Manager in assurance with Grant Thornton. Before rejoining the Halifax office in 2010, Matt spent two years as a CFO for a privately held company in Prince Edward Island. Matt gained invaluable experience working in a manufacturing setting that catered to the road construction industry. Matt has managed various engagements in many different industries which include but not limited to construction, real estate development, manufacturing, environmental waste management and agriculture. Matt is the co-leader of the Atlantic construction, real estate and hospitality sector for Grant Thornton and also sits on the board of directors for Habitat for Humanity of Nova Scotia.

CHRIS TRENAMAN, CA is an Audit Senior Manager with Grant Thornton’s Nova Scotia Business Unit. Chris has 10 years of experience in public accounting. He is responsible for the provision of audit and advisory services for a wide variety of the firm’s clients, with emphasis on not-for-profit organizations.

JANE VELDHOVEN, CPO® (Certified Professional Organizer) and founder of Get Organized! Professional Services is an industry leader in Atlantic Canada. For the past nine years she has been working with busy professionals to help them manage their time and space in a more effective and efficient manner. Jane has a great affinity with accountants and business owners alike and has a deep understanding for the challenges associated with a billable hour environment. Jane helps her clients spend less time on administrative duties and more time on revenue generating activities by introducing concepts, systems and processes for maximum productivity. A previous workshop participant says, “… Your enthusiasm and passion was infectious. I have undertaken many of your suggestions and I already notice a feeling of calm with a bit more control.”

CARROLL VICKERS, CA is a Manager in the Tax Group of Grant Thornton LLP in Sydney. She is responsible for the provision of corporate and personal tax services for a wide variety of the firm’s clients, with emphasis on small and medium size owner manager businesses. Experience includes compliance for individuals, corporations and trusts, corporate and personal tax planning, estate and succession planning, reorganizations and trusts.

HENRY VISSEr, CA, LLB, TEP is a partner in the Tax Group of McInnes Cooper in Halifax. He practices in the area of tax law with an emphasis on personal, corporate and estate tax planning, as well as commodity taxation (GST/HST and provincial sales tax), including such matters as estate freezes, crystallizations, succession planning, creditor-proofing, corporate structuring and restructuring, inbound and outbound investments and unlimited liability companies. Henry also has expertise in drafting income and sales tax legislation. Henry has written and presented for the Canadian Bar Association (Nova Scotia), the Institute of Chartered Accountants of Nova Scotia, the Institute of Chartered Accountants of Prince Edward Island, the Atlantic Provinces Tax Seminar, the CICA 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, 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.

DIANA WALSH, CA is a Manager with Grant Thornton's Halifax US tax practice. She is responsible for the personal and corporate compliance filings for the US practice. Experience includes corporate and personal tax planning, both domestic and US, as well as cross border planning opportunities and international taxation issues.

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.
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.

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ASPE: A Survey of the Standards

DL14150012 | DL14150013  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. In class session, see page 18.

CAS Auditing Refresher

DL14150052 | DL14150053  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

DL14150022 | DL14150023  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

DL14150032 | DL14150033  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

DL14150042 | DL14150043  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. In class session, see page 70.
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.

www.icabc-pd.com/pd-seminars.php
(click on Web-Based PD Seminars)
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.

Advanced Pension Case Studies
From a Payroll Perspective
CP14150061
Level: Advanced
This is an advanced seminar designed for payroll and pensions/benefits practitioners responsible for the processing and reporting of employee retirement contributions and/or benefits.

GOAL
You will gain the legislative knowledge needed to keep your organization compliant with Canada Revenue Agency (CRA) and Revenu Québec (RQ) when it comes to your organization’s retirement plan. The fundamentals covered in the CPA’s Pensions and Benefits from a Payroll Perspective PDS will briefly be reviewed before analyzing more complex scenarios and completing detailed exercises in the form of case studies.

PREREQUISITE/ PAST EXPERIENCE REQUIRED
• Best if the participant has attended the Pensions and Benefits from a Payroll Perspective seminar
• Recommended attendance every 2-3 years to keep up to date with legislative changes

CONTENT/LEARNING OBJECTIVES
• Brief Introduction of employer-sponsored retirement plans (it is recommended that participants first attend the CPA’s Pensions and Benefits from a Payroll Perspective before attending this advanced seminar)
• How to administer missed contributions and over-contributions
• Calculating a Pension Adjustment (PA), Past Service Pension Adjustment (PSPA) and Pension Adjustment Reversal (PAR) in complex situations
• Administering pension limits, payments and reporting requirements for complex situations such as:
  • Participating in more than one plan
  • Leaves of absence
  • Status Indians
  • Foreign Pension Plans
  • Variable pension benefits
  • Death of a pensioner

October 23, 2014, 8:30am - 4:30pm
Holiday Inn Express, 133 Kearney Lake Rd, Halifax

Legislative Update: Year-End & New Year
CP14150071
Level: Compliance
This seminar focuses on what is changing legislatively for year-end and what to anticipate for the new year. The program helps participants win the year-end reporting race and get a head start on the new year requirements.

This seminar is targeted to senior payroll professionals who have a strong understanding of the year-end process and who just want to focus on the changes for year-end and the changes impacting payroll operations in the new year.

YOU WILL LEARN
What’s new with the CRA, Revenu Québec & Service Canada?
• 2013 rates, tax exemptions & PA limits
• Changes to T4 and T4A slips
• EI hiring credit for small business
• Taxable benefit update
• New services available through My Business Account
• New EI benefits for parents of critically ill children
• Best variable weeks for EI unemployment claims
• ROE Web changes
• Changes to RL-1 slip

Jurisdictional changes
• Updates to employment/labour standards
• Provincial budget announcements
  • tax rates
  • health tax levies
  • HST update
• Provincial pension legislation
  • including pooled registered pension plan legislation being introduced
• Workers compensation assessable earnings

November 6, 2014, 8:30am - 12:00pm
Holiday Inn Express, 133 Kearney Lake Rd

7 PD Hrs Cost: $400 or 3.5 PD Hrs Cost: $295
*Passport Discount $120, counts as 1 passport day
*Passport Discount $60, counts as ½ passport day
Terminations  
**CP14150012**  
**Level:** Compliance  
This seminar is designed to provide you with a comprehensive overview of the payroll implications for a full range of taxable and non-taxable benefits and allowances. The program provides legislative details on a number of common benefits and allowances, their statutory withholding treatment, and year-end reporting requirements. It is ideal for:  
- Payroll and accounting managers and other professionals who need to be aware of changing taxable benefits values, policies and regulations; and  
- Human Resources and office managers and other business professionals with a functional responsibility for payroll.

**YOU WILL LEARN**  
- Taxable Benefits Legislation  
- Sales Tax Issues  
- Automobile Benefits and Allowances  
- Loans and Stock Options  
- Other Benefits and Allowances

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The Year-End Process (Federal): An Introduction  
**CP14150051**  
**Level:** Introductory  
Designed for payroll practitioners preparing year-end for the first time and for payroll professionals, accountants and managers who need a refresher on the year-end process. You’ll gain legislative knowledge to keep your organization compliant with Canada Revenue Agency (CRA). You’ll review the fundamentals required for processing T4/T4A slips and related summaries, and complete detailed exercises. This seminar will prepare you for our Year-end and New Year Requirements seminar available in November and December.

**YOU WILL LEARN**  
- Reconciling and balancing year-end slips and tax accounts  
- Step-by-step instructions for completing the T4/T4A slip and summary  
- Performing a pensionable and insurable earning review (PIER)  
- Methods of filing tax slips and reporting deadlines and penalties  
- How to handle exceptions such as:  
  - Reporting a repayment of salary or wage; and  
  - Correcting a payroll error  
- Process for adding, amending or cancelling slips

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Year-End & New Year Requirements  
**CP14150081 | CP14150082 | CP14150083**  
**Level:** Compliance  
A key installment in our Professional Development Series, this seminar helps participants win the year-end reporting race and get a head start on the New Year requirements. Participants will gain a thorough understanding of existing payroll legislation and practices to ensure their organization’s current payroll is accurate, and will look ahead to expectations for the new year and beyond.

**YOU WILL LEARN**  
- What’s new with the CRA, Revenu Québec & Service Canada?  
- Federal legislative update  
  - 2013 rates, tax exemptions & PA limits  
  - Changes to T4 and T4A slips  
  - EI hiring credit for small business  
  - Taxable benefit update  
  - New services available through My Business Account  
  - New EI benefits for parents of critically ill children  
  - Best variable weeks for EI unemployment claims  
  - ROE Web changes  
  - Changes to RL-1 slip  
- Jurisdictional changes  
  - Updates to employment/labour standards  
  - Provincial budget announcements  
  - tax rates  
  - health tax levies  
  - HST update  
  - Provincial pension legislation  
  - including pooled registered pension plan legislation being introduced  
  - Workers compensation assessable earnings  
  - Year-end reporting  
  - Year-end/new year checklist  
  - Extensive taxable benefit tables  
  - How to complete T4, T4A, RL-1 slips and related summaries  
  - Filing options  
  - Deadlines and penalties  
  - Adding, amending or cancelling slips  
  - Avoiding a PIER  
  - Correcting payroll errors

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November 14 & December 4, 2014, 8:30am - 4:30pm  
Holiday Inn Express, 133 Kearney Lake Rd

November 27, 2014, 8:30am - 4:30pm  
Holiday Inn Halifax Harbourview, 101 Wyse Road, Dartmouth

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**ADDITIONAL PD OPPORTUNITIES**

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November 11, 2014, 8:30am - 4:30pm  
Holiday Inn Express, 133 Kearney Lake Rd, Halifax

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**7 PD Hrs Cost: $400 or 3.5 PD Hrs Cost: $295**  
*Passport Discount $120, counts as 1 passport day  
*Passport Discount $60, counts as ½ passport day
ADDITIONAL PD OPPORTUNITIES

Chartered Professional Accountants of Canada Professional Learning and Development 2014/15

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

For additional information on our upcoming programs, visit: cpacanada.ca/2014-15Programs

INCOME TAX
- National Conference on Income Taxes for SMPs
  October 6-8, 2014, Toronto, ON
- Navigating and Resolving Tax Disputes
  TBD 2015

IN-DEPTH COURSES
- Advanced Tax Issues for the Owner-Managed Businesses Course
  November 1-5, 2014, Niagara Falls, ON
- Income Tax Practice Course – West
  November 1-7, 2014, Banff, AB
- Corporate Reorganizations Course
  November 8-12, 2014, Whistler, BC
- Advanced International Tax Course
  November 16-19, 2014, Niagara Falls, ON
- Income Tax Practice Course – East
  November 29 - December 5, 2014, Collingwood, ON
- Foundations in International Tax
  TBD 2015

NEW TAX BLENDED LEARNING COURSES FOR TAX PROFESSIONALS (elearning combined with comprehensive case-study sessions)
Available Fall/Winter 2014
- Accounting for Income Taxes
- U.S. Tax for the Canadian Tax Practitioner
- Scientific Research and Experimental Development

INDIRECT TAX
- Commodity Tax Symposium
  September 29-30, 2014, Ottawa, ON
  (optional workshops September 28 and October 1)
- Commodity Tax Symposium – West
  February 2015, Calgary, AB
- Advanced HST/GST Courses – Elearning
  Available Summer 2014
- Cross-Border Transactions
- Real Property
- Public Sector Bodies

NEW TAX BLENDED LEARNING COURSE
(for the non-indirect tax specialist)
- Indirect Tax

FINANCIAL AND MANAGEMENT ACCOUNTING AND REPORTING
- CPA Canada's National Conference
  September 22-23, 2014 (optional workshops September 24)
  Metro Toronto Convention Centre, Toronto, ON
- In-Depth IFRS Certificate Course
  November 17-21, 2014, Toronto, ON
- CPA Canada’s Conference for Audit Committees
  November 25-26, 2014, Toronto, ON
  (pre-conference workshop November 24)
- CPA Canada’s Conference for the Oil and Gas Industry
  November 25-26, 2014, Calgary, AB
- CPA Canada’s Not-for-Profit Financial Executive Forum
  TBD 2015

PUBLIC SECTOR
- CPA Canada’s Public Sector Conference
  October 6-7, 2014, Ottawa, ON
- Public Sector Financial Reporting and Accounting Course
  November 24-28, 2014, Ottawa, ON

TRANSFER PRICING
- In-Depth Transfer Pricing Course – Part I – Elearning
  Available Now – Online Access

SPECIALTY AREAS
- In-Depth Brokers and Investment Dealers Course
  September 15-17, 2014, Toronto, ON
- CPA Canada’s National Conference for Business Transitions
  November 3-4, 2014, Toronto, ON
  (post conference workshop November 5)
- CREDENTIAL – CFF – Certified in Financial Forensics
- CREDENTIAL – CITP – Certified Information Technology Professional
- SECTION MEMBERSHIPS in Forensic Accounting, Information Management and Technology, Business Valuations, Personal Financial Services

SME ADVISORY SERVICES
- Practice Development Retreat Workshop for SME Advisors
  September 22-24, 2014, Niagara Falls, ON
  January 14-16, 2015, Vancouver, BC

CORPORATE FINANCE
- Ethical and Regulatory Issues in Corporate Finance - Elearning
  Available Now – Online Access
- Corporate Finance Refresher Courses - Elearning
  Available Now – Online Access
- Valuation in Corporate Finance
  September 15-16, 2014, Calgary, AB
  October 6-7, 2014, Toronto, ON
- Debt and Equity in Corporate Finance
  October 27-28, 2014, Calgary, AB
  November 3-4, 2014, Toronto, ON
- Advanced Corporate Finance Course
  Session I – January 21-23, 2015, Toronto, ON
  Session II – March 3-5, 2015, Toronto, ON
- Corporate Finance Assessment
  March 6, 2015, Toronto, ON

INFORMATION MANAGEMENT AND TECHNOLOGY
- Canadian Conference on IT Audit, Governance and Security
  March 2015, Toronto, ON
- Fundamentals of IT Audit – A Three-Day Workshop
  March 2015, Toronto, ON

NORTH AMERICAN CPD SERIES
- IFRS On-Line Self-Study Certificate Program
  Available Now – Online Access
- AICPA XBRL Fundamentals Certificate Program
  Available Now – Online Access
- AICPA Expert Witness Workshop
  September 11-13, 2014, Washington, DC
- AICPA Forensic and Valuation Services Conference
  November 9-11, 2014, New Orleans, LA
- AICPA Forensic Accounting Certificate Program
  TBD 2014
- AICPA Advanced Personal Financial Planning Conference
  TBD 2015

Note: All events, dates and locations subject to change.
Executive Development Programs
Chartered Professional Accountants of Ontario (CPA Ontario)
Location: Niagara-on-the-Lake, Ontario

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

THE CONTROLLERSHIP PROGRAM
Operational Skills | November 9 - 12
Polish your financial skills. Learn about leading-edge developments in finance. Develop your analytical skills. Understand new developments in internal control and compliance. Obtain new insights in how to reduce costs and improve efficiency. Improve the financial reporting process and ensure the integrity of the numbers. These are the Controller’s core competencies. Become the financial expert in your organization – the go-to finance manager who can develop and interpret financial and operational metrics and provide decision support for key executives.

Management Competencies | November 16 – 19
In Part 2 of the Controllership Program, you will focus on your coaching, management skills, presentation, negotiation skills and devote time to the enhancement of your personal development. The course emphasizes practical approaches and the sharing of best practices in a stimulating and collaborative setting. You will leave with established priorities and plans for what you want to change in the period ahead and the skills to accomplish it. Your company will profit from your ability to build high-performance teams, and aptitude for implementing business process improvements.

THE CFO LEADERSHIP PROGRAM
CFO Operational Skills | Date to be determined - 2015
This program delivers the core CFO competencies that organizations expect and demand. Get up to speed on corporate governance and risk management and the latest tools and application. Examine the relationship of strategy and risk-taking. Nail down the planning, budgeting and internal control competencies that facilitate efficient and effective operations. Explore CFO competencies in business valuation, business intelligence, and intellectual property. Learn how to effectively communicate the core finance and operating results for internal and external stakeholders.

CFO Leadership Competencies | October 26 – 29
Organizations with skillful leadership consistently outperform those with less effective management. Attendees will come away as a more self-assured finance team leader with enhanced abilities to contribute to organizational core values, and understand how to communicate effectively with stakeholders. You will learn how to navigate the politics and become a strategic business partner in your organization and enhance your capabilities as a leader.

For full program descriptions, testimonials and registration information please visit: www.cpaontario.ca/PDExec

If you have questions please contact:
Lawrence Wong CPA, CA
Associate Director, Professional Development
Toll free: 1-800-387-0735 Ext. 343 E-mail: lwong@cpaontario.ca

ADVANCED LEADERSHIP SERIES
THE CFO AS NAVIGATOR | NOVEMBER 18 – 21
The modern day CFO needs not only to understand and appreciate non-financial parts of their business, but take key strategic roles in these areas. This program is designed to make you a complete CFO by providing you breadth and depth in key areas such as dashboards, performance metrics, information management and business intelligence, corporate strategy, and talent management. It is not meant to convert you into the VP-HR or the Chief Information Officer, but to provide you with enough knowledge to either manage these functions or to communicate effectively to these counterparts with knowledge and confidence.

Smart Leaders 2.0: Thinking and Innovation skills | November 24 – 27
Thinking more effectively is the key to success in everything you do, whether discovering hidden possibilities, conceiving breakthrough ideas, or dealing with complex issues. Creative thinking is neither a gift nor a consequence of magical inspiration; it is a learnable skill. This program contradicts everything you’ve likely ever been taught about how to acquire information, solve problems and make better choices, breaking you out of the mold and allowing you to see opportunities in a way you never had before.

The Optimal Negotiator | December 15 – 18
Arguably the one skill today’s leaders must possess is the ability to get people to agree with them. In any undertaking of significance, whether personal or business related, knowing how to get others to accept your point of view while seeing themselves as winners is crucial to your success, if not the prosperity of your organization. Indeed, one cannot ever expect to ascend the corporate ladder without a sound grasp of the fundamental negotiating principles and nuances or without the knowledge and skills to emulate those who consistently do it well.

THE CEO PROGRAM
LEADING WITH PURPOSE | Date to be determined - 2015
This is the definitive learning experience for current and aspiring CEOs who want to excel with confidence and conviction in the upper echelons of executive responsibility. The curriculum for 2014 includes defining and acquiring a leadership identity, projecting executive presence, improving strategic intelligence and role of CEO as “chief decision maker” amidst the reality of power, politics and scrutiny in organizational life. Discover the real meaning of “leading with purpose” and how to do it in our highly volatile, unpredictable, hypercompetitive world – one that quickly discredit and shreds leaders who are either unprepared or grossly overconfident.

THE CFO AS STRATEGIST | Date to be determined - 2015
Strategy is not just for the CEO. As a key point person, the CFO has a distinct and important role in strategy. In fact, a Queen’s University study points to the role as Strategist as the next most important role of the CFO beyond their role as the gatekeeper of accounting, financial controls and risk management. Strategy isn’t just about vision statements and planning (though these are important). It’s also about delivery. It’s about moving from strategic plan to strategic implementation. It’s about moving it from an aspirational goal to the new reality of the company. This monumental task is often placed directly on the shoulders of you, the CFO. Are you prepared?

For program descriptions, testimonials and registration information please visit: www.cpaontario.ca/PDExec

If you have questions please contact:
Lawrence Wong CPA, CA
Associate Director, Professional Development
Toll free: 1-800-387-0735 Ext. 343 E-mail: lwong@cpaontario.ca
ADDITIONAL PD OPPORTUNITIES

Executive Leadership Programs (ICAAB)
TAKE THE LEAD!
Go beyond the technical and elevate your performance to gain the competencies you need to successfully lead others, lead teams, lead the financial function and lead organizational transformation.

This intensive program is designed for CFOs and aspiring CFOs who are determined to move their career and their organizations forward. Building on core financial skills, it prepares executives for the next step in their career.

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

October 18 - 24, 2014 - Banff, AB
May 23 - 29, 2015 - Banff, AB
For more information email cfoleadership@icca.ab.ca or call 1800-232-9406.

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

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

September 20 – 26, 2014 – Banff, AB
November 22 – 28, 2014 – Banff, AB
For more information email controllership@icca.ab.ca or call 1-800-232-9406.

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

*Please identify yourself as an ICANS member and provide your member number to receive the 10% discount
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 5 full-days and the organization passport the equivalent of 9 full-days. An added bonus is that members can take additional passport valid courses once a passport is purchased at a reduced rate.

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

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

3. Why can’t I switch courses after the deadline?
A deadline is necessary to allow time for the Institute staff to prepare course material, registration lists and make administrative decisions on class sizes and placement.

4. There are usually cancellations or “no shows” why can’t I take their place in the course? or Why can’t I attend a course or “just sit in” on the course during the week if I find my schedule has been freed up?
For obvious reasons, it is only fair that all seminar attendees have paid the necessary registration fees and abided by the same rules and policies. When seminars are “sold out” a decision has been made that a larger participation would diminish the effectiveness and quality of the seminar.

5. I don’t mind attending PD courses, but find that the Institute only offers a minimum amount of courses in areas of interest to me. Why should I subsidize other people’s training through the Institute and then have to go elsewhere for my own seminars?
This question raises two issues. First of all, the Institute’s PD Program is a self-funding activity which is intended to operate on at least a break-even basis. Accordingly, members who do not attend the PD Program are not subsidizing those that do. Secondly, while the Institute attempts to offer a wide range of courses which will be of interest to Chartered Accountants both in and outside public practice, it would be impossible to attempt to address all the PD needs of each and every member. There are many in-house training programs and courses offered by universities, other professional associations, and entrepreneurial training companies which are of the highest quality and offer specific training in areas which would be impossible for the Institute to offer. In addition, there seems little point in competing with these sources if Chartered Accountants can attend the sessions at a suitable time, location and at a reasonable cost. Given the above, it is not surprising that many of the courses offered by the Institute are fairly technical, core topic courses which would be of interest to Chartered Accountants but may not be broad enough for other agencies to offer in the market.

6. How can I become an instructor for ICANS?
Just phone, email or write to Kathie at the Institute office, we are always happy to add new instructors to our database.

Further questions? Please call Kathie Slaunwhite, PD Director at (902)425-3291 ext. 23, fax at (902)423-4505 or email kslaunwhite@icans.ns.ca.
Continuing Professional Development - 2008 And Beyond

Members are referred to the ICANS’ website www.icans.ns.ca 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 PD learning activities remain the same as in the past, although there is the requirement for “verifiable” study. (reference Bulletin #2)
4. Members are required to file annually a PD report which sets forth their hours of PD learning activities. (reference Bulletin #3)
5. Members are required to retain appropriate documentation which supports their PD reports and, upon request, make this information available to ICANS. (reference Bulletin #3)
6. ICANS has introduced policies/procedures for purposes of verifying PD reports. (reference Bulletin #3)
7. The PD Committee will continue to grant waivers to individual members based on individual circumstances or classes of members. (reference Bulletin #4)

CA Competency

The CA profession has undertaken a detailed analysis of the core knowledge and skills expected of CAs by business, government and the public. Working with members, clients and employers, many clear expectations - or competencies - of our profession have been identified.

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

PERVASIVE QUALITIES AND SKILLS
These skills include:
• ethical behaviour and professionalism
• personal attributes such as accountability, adaptability to change and the ability to self-manage, take initiative and add value
• professional skills such as communication, problem solving and management

SPECIFIC COMPETENCIES
• governance, strategy, and risk management
• performance measurement and reporting
• assurance
• finance
• management decision making
• taxation

To learn more about the Competency Map please refer to the ICANS website www.icans.ns.ca, click the Professional Development tab, CPD Opportunities link and under the Additional Information heading, Competency Map.

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
• 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
THE INSTITUTE OF CHARTERED ACCOUNTANTS OF NOVA SCOTIA

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