

2011-2012 **Fall** | **Winter**

Professional Development Catalogue

Chartered Accountants of Manitoba



Celebrating **125** years of service to Manitoba



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Did You Know

Special Dietary Requirements

Please inform us on your registration form or by emailing Michelle Chartrand at mchartrand@icam.mb.ca at least two weeks prior to your seminar if you have any food allergies or special dietary needs. Please note that this only applies to full-day seminars where lunch is provided.

Early Registration

We strongly encourage members to register early for seminars they wish to attend. Early registration will not only ensure your space in some of our highly popular seminars, but will also prevent seminars with lower enrolment numbers from getting cancelled.

Wait Lists

The maximum number of participants allowed in a seminar is dependent on the type of presentation and delivery format set by the course author. Although we try to accommodate as many requests as we can, we do not want to compromise the ability of our seminar leaders to teach effectively, nor the quality of learning to attendees. If a seminar you want to register for is full, you can request to be added to the waitlist.

Teaching for ICAM PD

We are always looking for CAs and other professionals to develop and teach seminars for our PD Program. If you, or someone you know, would be interested, please contact Kathy Zaplitny, CA, Senior Director of Professional Services and Operations at kzaplitny@icam.mb.ca.

Professional Development Group

Kathy Zaplitny, CA

Senior Director of Professional Services and Operations
kzaplitny@icam.mb.ca

Marie Kostiuk

PD Coordinator
mkostiuk@icam.mb.ca

Michelle Chartrand

Executive Assistant
mchartrand@icam.mb.ca

Remember to sign the attendance sheet to ensure your CPD records are automatically updated for all the Institute PD courses you attend!

PD Passports

The PD Passport is a savings program for members and others who are interested in taking multiple professional development seminars through our PD Program. GST will be added to the prices listed below.

Personal Passport

Offers the convenience and flexibility of 5 seminar days (any combination of half-day, full day and two day sessions). The Personal Passport is non-transferable - only the passport holder can use it.

Pricing Until October 14, 2011	Pricing After October 14, 2011
Member \$850	Member \$950
Non-Member \$1,100	Non-Member \$1,200

Corporate Passport

Allows you or others in your organization 9 seminar days (any combination of half-day, full day and two day sessions). The Corporate Passport is transferable. The name of the Passport Representative and the names of individuals attending the seminars must be provided upon registration for each seminar.

Pricing Until October 14, 2011	Pricing After October 14, 2011
\$2,000	\$2,200

Mini Passport

*The Mini Passport is **only** available to members who are exempt from paying fees or are paying reduced fees.*

Offers the convenience and flexibility of 3 seminar days (any combination of half-day, full day and two day sessions). The Mini Passport is non-transferable - only the passport holder can use it.

Pricing Until October 14, 2011	Pricing After October 14, 2011
\$300	\$350

Note: Seminars offered by our PD Affiliates may not be passport valid. In some cases, there may be a discount for passport holders.

Personal and Mini Passports can be purchased on the Institute website using Member Login at icam.mb.ca. Or you may return a completed Passport Application Form (available on the Institute's website under Professional Development > Passports) with payment to the Institute. Corporate Passports must be purchased using the Passport Application Form.

Passport Terms & Conditions are outlined on page 33, on our website, and on the back of the 2011-2012 Passport Application form.

Seminar Pricing

Unless otherwise indicated, all courses are PD Passport valid. Pricing for the 2011-2012 Fall/Winter Professional Development seminars is as listed below:

Half Day Seminar Member: \$200 Non-member: \$245	Full Day Seminar Member: \$340 Non-member: \$420
Two Day Seminar Member: \$500 Non-member: \$600	

For up-to-the-minute information and online registration, go to icam.mb.ca > Professional Development > Seminars.

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Browse seminars and register to attend online at icam.mb.ca.

October 2011

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New Year's Day	OFFICE CLOSED		PD ONLINE Jan 16 – Mar 12, 2012 ITR-Corporate (zcl) (PG.29) ITR-Personal (zcl) (PG.29) ASPE: A Survey of the Standards (zEB) (PG.29) Auditing in the New CAS Environment (zEC) (PG.29) IFRS: A Survey of the Standards (zED) (PG.29)		Accounting, Auditing and Professional Practice Update (zCK) (PG.9) (NOV 3)	IncomeTax Update 2011 (ZCL) (PG.24) (OCT 21, DEC 9, FEB 3)																																																																																																		
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	Not-for-Profit Organizations - The New Accounting Standards (ZCM) (PG.10) (DEC 5)	Taxation of Domestic Trusts - Compliance (zCN) (PG.27)	GST/HST Refresher for Professionals (zCP) (PG.23)	Catching Up - 5 Years of Income Tax Developments (zCQ) (PG.22)	AM Not-for-Profit Organizations and Registered Charities - Taxation Issues (zCR) (PG.24)	14																																																																																																		
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			AM Income Splitting (zCS) (PG.23) PM Taxation of Employee Benefits (zCT) (PG.27)		Tax Decisions with Long Term Implications (zCU) (PG.26)																																																																																																			
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Accounting, Auditing and Professional Practice Update

OBJECTIVE

The objectives of this seminar are to provide an overview on the direction of accounting and assurance standards in Canada; to review recent revisions to the *CICA Handbook – Accounting* and the *CICA Handbook – Assurance*; to provide specific examples of the implementation of new recommendations; and to provide guidance on other matters that are current and relevant to participants.

WHO SHOULD ATTEND

This course is designed for members who practice public accounting, serving small and medium-sized businesses.

CONTENT

- Introduction and overview of new standards
- Review of various components of the *CICA Handbook – Accounting*:
 - Part I, IFRS for publicly accountable enterprises
 - Part II, Accounting Standards for private enterprises (ASPE)
 - Part III, Accounting Standards for not-for-profit organizations
- Matters discussed by the Private Enterprise Advisory Committee
- Transition guidance for ASPE
- Lessons learned from application of CASs
- Other assurance matters in progress, including review engagements and compilations
- Practice matters
- Exposure drafts and projects

SEMINAR LEADER

Tamara Schock, CA

**November 3, 2011 (ZAW)
January 5, 2012 (ZCK)
6.5 CPD Hours**

- ❖ Assurance
- ❖ Performance Measurement - Financial Reporting

ASPE - A Comparison to Part V

OBJECTIVE

This seminar provides a comparison of GAAP standards contained in *CICA Handbook – Accounting Part V*, pre-changeover GAAP (previously the *CICA Handbook – Accounting* and the *CICA Handbook – Accounting XFI*) with Accounting Standards for Private Enterprises (ASPE) now included in Part II of the *CICA Handbook - Accounting*. It will provide a brief summary of how these standards came to be, followed by a section-by-section review of the changes.

The primary objective is to assist participants in understanding what has and has not changed from current practice in all areas, and how these changes impact the financial statements. The seminar also identifies the transitional requirements and options associated with adopting the new framework.

WHO SHOULD ATTEND

Anyone who needs to understand the accounting framework for private enterprises in Canada that came into effect for years beginning on or after January 1, 2011.

CONTENT

- ASPE framework
- First time adoption
- Transition matters
- Current assets and liabilities
- Non-current assets and liabilities
- Equity
- Financial instruments
- Revenue, expenses and cash flows
- Other standards

SEMINAR LEADER

John Kelly, FCA

**November 15, 2011 (ZBF)
January 30, 2012 (ZCY)
6.5 CPD Hours**

- ❖ Assurance
- ❖ Performance Measurement - Financial Reporting

Financial Instruments for Private Enterprises and Not-For-Profit Organizations

OBJECTIVE

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 not-for-profit organizations, these same financial instrument standards will apply to organizations adopting Part III of the *CICA Handbook – Accounting*.

This seminar will explore the financial instruments standards from recognition to disclosure. The entire focus will be on Section 3856, *Financial Instruments*. These standards are applicable for private enterprise financial statements beginning January 1, 2011 and not-for-profit organization financial statements beginning January 1, 2012.

WHO SHOULD ATTEND

Financial professionals operating or volunteering in the private enterprise environment or not-for-profit environment will find this course beneficial.

CONTENT

- Initial recognition and presentation of financial instruments
- Application of fair value and amortized cost methods
- Measurement and disclosure of financial instruments
- Identification of optional presentation and disclosure methods
- Valuation options and requirements for not-for-profit investment portfolios

SEMINAR LEADER

Tamara Schock, CA

**November 16, 2011 PM (ZBH)
3.0 CPD Hours**

- ❖ Performance Measurement - Financial Reporting

Fraud Happens! What to Do When You Suspect Fraud

OBJECTIVE

You don't encounter fraud every day. This seminar, taught by an experienced fraud investigator, will provide you with the basic skills you need to react to allegations of fraud in an efficient and effective way. You won't be a fully trained fraud investigator at the end of the day but you will know enough to not panic and to work through the situation.

The seminar will provide a framework in which to manage the investigation of fraud allegations, including use of investigative tools, sources of recovery, and related aspects (such as dealing with the media and the police).

WHO SHOULD ATTEND

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 in order to avoid common pitfalls.

CONTENT

- Overview of fraud:
 - the tools organizations use to address fraud
 - preparing an organization to address fraud allegations
 - common perils and pitfalls
- Real life fraud cases - review of recent frauds
- Indicators of fraud; planning an investigation - initial steps in planning
- Investigative research
 - publicly available information
 - internal sources of information
- Computerized information
 - preserving, analyzing and presenting electronic evidence
- Legal tools and remedies
- Developing the investigative plan

SEMINAR LEADER

Victor Neufeld, CA+IFA

**February 29, 2012 (ZDN)
6.5 CPD Hours**

- ❖ Assurance
- ❖ Performance Measurement - Financial Reporting

IFRS – An Update**OBJECTIVE**

IFRS standards are changing and it is important to keep abreast of recent developments. This course will provide participants with an overview of new and revised IFRSs and an up-to-date snapshot of other projects being considered by IFRS standard setters. The content covers new and revised standards approved from July 2010 to June 2011.

WHO SHOULD ATTEND

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

CONTENT

- Overview of IFRS standards – issued, revised and in progress
- Review of new and revised standards
 - consolidation
 - joint ventures
 - fair value measurement
 - financial instruments
 - employee benefits
 - other
- Review of Exposure Drafts and other projects in progress – IASB's work plan

SEMINAR LEADER

Tamara Schock, CA

November 16, 2011 AM (ZBG)
3.0 CPD Hours

- ❖ Performance Measurement – Financial Reporting

Internal Control for CEO/CFO Certification**OBJECTIVE**

The objective of this seminar is to provide participants with relevant and practical guidance on evaluating and documenting internal control design and implementation using a risk based approach.

This course will provide participants with:

- an overview of internal control over financial reporting as defined in the COSO framework and used for the CEO/CFO reporting requirements; and,
- guidance on how to apply the best practice “Top Down Risk Based Approach” for effectively evaluating and documenting internal controls

WHO SHOULD ATTEND

CAs and others in industry who are involved in evaluating and reporting on the effectiveness of the internal controls over financial reporting in their company.

CONTENT

- The relationship between risk and control
- Relevant internal controls over financial reporting
- How to apply the “Top Down Risk Based” approach to:
 - pervasive (entity level) controls and
 - transactional controls
- Anti-fraud controls
- Updating control documentation in subsequent years
- Identifying key internal controls
- Designing an effective test of control (entity level, transactional controls) and determining the appropriate sample size
- How to identify and report on significant deficiencies and material weaknesses in internal control

SEMINAR LEADER

Stuart Hartley, FCA, CA•IT

November 1, 2011 PM (ZAU)
3.0 CPD Hours

- ❖ Organizational Effectiveness, Control & Risk Management
- ❖ Assurance

Internal Control for Small Audit**OBJECTIVE**

This seminar will provide participants with an understanding of internal control over financial reporting as defined in CAS 315 and its application to the audit of a small entity.

The seminar will provide guidance on how to apply the best practice approach of “Top Down and Risk Based” for effectively evaluating and documenting internal controls. Participants will learn why the traditional “Bottom-Up” approach to internal control evaluation is often less than effective and can waste valuable audit time.

WHO SHOULD ATTEND

Professional personnel with a solid understanding of CAS requirements including CA members and their professional staff in public practice.

CONTENT

- Relationship between risk and control
- What the “Top Down Risk Based” approach is and how it can save time
- How best to evaluate the design and implementation of pervasive (entity level) controls and transactional controls in a very small entity
- Documenting internal control in small entities
- How to identify and respond to significant risks
- Updating control documentation in subsequent years
- When (and when not) to consider testing internal controls
- How to design an effective test of control including sample sizes
- How to identify and report on significant deficiencies in internal control

SEMINAR LEADER

Stuart Hartley, FCA, CA•IT

November 1, 2011 AM (ZAT)
3.0 CPD Hours

- ❖ Assurance
- ❖ Performance Measurement - Financial Reporting

Not-for-Profit Organizations – The New Accounting Standards (CICA Handbook – Accounting, Part III)**OBJECTIVE**

The Canadian Accounting Standards Board (AcSB) finalized the new accounting standards for private not-for-profit organizations (NFPOs) in December 2010. This course provides an overview of the new accounting standards for NFPOs under Part III of the *CICA Handbook - Accounting*. It reviews the application of GAAP with an emphasis on areas where choices have to be made in the preparation of financial statements.

The accounting standards under Part III of the *CICA Handbook - Accounting* are different from current GAAP under *CICA Handbook – Accounting, Part V* (pre-changeover GAAP) and the most notable change is in the accounting for financial instruments. This could have a significant impact for some NFPOs.

WHO SHOULD ATTEND

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

CONTENT

- Review of Part III of the *CICA Handbook – Accounting*
- Financial statement presentation
 - a review of the accounting choices that must be made
- Accounting for financial instruments
- Accounting for contributions and contributions receivable
- Accounting for capital assets and collections
- Accounting and disclosures related to controlled and related entities
- Other matters and disclosures
 - use of a disclosure checklist

SEMINAR LEADER

John Kelly, FCA

December 5, 2011 (ZBX)
January 9, 2012 (ZCM)
6.5 CPD Hours

- ❖ Performance Measurement – Financial Reporting

Review & Compilation Engagements

OBJECTIVE

This seminar will provide practitioners with a refreshed skill set for completing review and compilation engagements. It will give an overview of the requirements of the *CICA Handbook – Assurance, Section 9200* and other related standards and how to apply these standards in practice on a consistent basis.

Leave the seminar with confidence that your files will hold up to the scrutiny of the profession and, if necessary, the courts.

WHO SHOULD ATTEND

This seminar is designed for new and experienced practitioners who would like a refresher on review and compilation engagements, including a review of some “best practices”.

CONTENT

- Overview of engagement standards
- Refresher on the acquisition and documentation of knowledge of the entity’s business and industry in a review engagement and how to maximize the use of this understanding during planning and completion of the engagement
- Relationship of “risk” to “work performed” with an emphasis on high-risk areas
- Sample documentation and case studies
- Different review engagement reports and their meaning to users
- Use of AuG 20
- Techniques to ensure an effective and efficient engagement
- Impact of the Canadian Auditing Standards (CASs) on review engagements
- Miscellaneous topics relating to compilations

SEMINAR LEADER

John Kelly, FCA

February 2, 2012 (ZDA)
6.5 CPD Hours

- ❖ Assurance

The New Audit Reporting Model and Related Standards

OBJECTIVE

This course provides an overview of the reporting standards under the Canadian Auditing Standards (CASs).

WHO SHOULD ATTEND

This seminar is designed for both members who practise public accounting and members in industry who would like an overview of changes to the auditing standards relating to reporting, whether they are issuing or reading the audit reports.

CONTENT

- Overview of the acceptable financial reporting frameworks under CAS
- Review of the appropriate reports under each of the acceptable financial reporting frameworks
- Review of the dating of the audit report and subsequent event testing
- Review of potential modifications to the Independent Auditor’s Report
- Review of emphasis of matter and other matter paragraphs
- Overview of other significant changes to auditing standards, including:
 - audit of accounting and fair value estimates
 - going concern
 - using the work of an auditor’s expert
 - other standards that might affect the content of the audit report

SEMINAR LEADER

Travis Leppky, CA

October 31, 2011 PM (ZAS)
3.0 CPD hours

- ❖ Performance Measurement - Financial Reporting
- ❖ Assurance

The CAS Audit of Very Small Entities

OBJECTIVE

Canadian Auditing Standards (CASs) state that the objectives and requirements of an audit are exactly the same for both large and small entities. This course provides practical guidance on how the CASs requirements can be applied proportionally to the audit of very small entities and how to prepare audit documentation that complies with the CASs in a cost-effective manner.

This seminar will provide participants with a practical approach to planning, performing and documenting the micro entity audit. A case study using a micro not-for-profit organization (NFPO) will be used to reinforce the learning.

WHO SHOULD ATTEND

Professional personnel with a solid understanding of CASs requirements including CA members and their professional staff in public practice.

CONTENT

- Characteristics and challenges of a micro audit
- Important pre-requisites for performing an audit
- What CASs can safely be ignored?
- What is an effective audit process for micro audits?
- Is planning worthwhile on a micro audit?
- Importance of risk assessment procedures
- How should the risk of fraud be addressed?
- Why bother with internal control?
- Determining the nature and extent of audit procedures
- How to document audit results in compliance with the CASs

SEMINAR LEADER

Stuart Hartley, FCA, CA-IT

November 2, 2011 (ZAV)
6.5 CPD Hours

- ❖ Assurance

Building a Financial Model

OBJECTIVE

Learn to develop an integrated monthly and annual financial model in an interactive, step-by-step and hands on introductory course designed for all financial professionals. After completing the course, participants will be equipped with the skills necessary to build a financial model on their own as well as a template for future projects.

WHO SHOULD ATTEND

Professionals in valuation, corporate finance, restructuring, due diligence, capital providers/lenders, investment bankers, financial consultants, entrepreneurs, accountants, students and prospective financial professionals.

CONTENT

- Understanding the accounting necessary to construct a financial model
- Conducting financial analysis to determine the right choices for assumptions
- Building a model for a mid-sized private business
- Constructing supporting debt, asset, working capital and tax schedules
- Understanding interest rate circularity and how to ensure that the balance sheet balances
- Testing the financial model for errors and tricks for diagnosing the source of errors
- Learning modelling best practices and Excel shortcuts that save time
- Conducting sensitivity analysis on assumptions
- Demonstrating how the financial model may be used as a decision-making tool

NOTE: You will need a laptop computer.

SEMINAR LEADER

John Jazwinski, CA

October 19, 2011 (ZAG)
6.5 CPD Hours

NON PASSPORT ELIGIBLE

Member: \$475
Non-Member: \$525

- ❖ Finance
- ❖ Performance Measurement
- ❖ Information Technology

Business Valuations - Introduction

OBJECTIVE

This seminar provides participants a practical insight into business valuation. Participants will learn about and apply valuation 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.

WHO SHOULD ATTEND

This seminar will be particularly valuable to members in industry and to practitioners who are seeking a better understanding of business valuation principles and practices.

CONTENT

- 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

NOTE: Please bring a calculator to the seminar.

SEMINAR LEADER

Dean Schinkel, CA

November 8, 2011 (ZBA)
6.5 CPD Hours

- ❖ Finance – Corporate Finance

Corporate Treasury Management

OBJECTIVE

The treasury function has evolved from cash management and insurance to funding strategy, complex risk management techniques and oversight of many aspects of corporate risk management and loss reduction.

This seminar provides participants with the tools necessary to add value to the treasury function in their organization. By attending this seminar, participants will improve their understanding of the functions carried out by a modern corporate treasury department, and will develop their analytical and problem solving skills.

WHO SHOULD ATTEND

Corporate finance and treasury professionals, internal and external auditors and consultants, controllers and CFOs. The seminar will be of interest to those in large organizations with separate treasury departments and smaller companies where the treasury functions are carried out by finance and accounting staff, as well as their consultants and auditors.

CONTENT

- Plan short-term, medium-term and long-term cash and funding requirements
- Analyze capital structure and cost of capital
- Understand derivatives and how they work
- Risk management
 - enterprise risk management
 - financial risk management
- Value-at-risk
- Improve treasury internal controls and control systems
- Identify key issues in dealing with bankers and lenders

SEMINAR LEADER

Jeffrey D. Sherman, B.Com., MBA, FCSI, CA

December 14, 2011 (ZCF)
6.5 CPD Hours

- ❖ Assurance
- ❖ Finance – Corporate Finance
- ❖ Organizational Effectiveness, Control & Risk Management

Due Diligence for Acquisitions

OBJECTIVE

This seminar describes how to plan and execute due diligence assignments, identify key issues and risks, and know what to look for when undertaking business and financial reviews. The focus is on understanding the objective of the due diligence review as part of the overall acquisition or divestiture process.

WHO SHOULD ATTEND

CAs with experience in mergers and acquisitions who would like some fresh perspectives, as well as those undertaking due diligence for the first time. The seminar will also benefit those on the receiving end of a due diligence review.

CONTENT

- Overview of the due diligence process
- Planning the acquisition
- Planning the due diligence review
- Information and confidentiality
- Critical issues in confidentiality agreements
- Financial review
- Human resources review
- Legal review
- Operational review
- Purchase price and valuation
- Reporting
- Identifying key issues in a prospective acquisition
- Tips and traps

SEMINAR LEADER

Jeffrey D. Sherman, B.Com., MBA, FCSI, CA

December 13, 2011 (ZCE)
6.5 CPD Hours

- ❖ Finance – Corporate Finance

Financial Modeling in Excel

OBJECTIVE

This interactive workshop enables participants to confidently build a suite of forecast financial statements for a company in Excel using best modeling practice.

WHO SHOULD ATTEND

This seminar will be particularly valuable to members in industry and to practitioners who are looking to improve their financial model building skills.

CONTENT

- Use the spreadsheet development process to construct flexible, dynamic and robust financial models
- Model a business entity using income statements, balance sheets and cash flow forecasts (i.e. develop an operating model)
- Build complex calculations as a number of simple, transparent parts that are easy to audit
- Perform “what if” scenario analysis recording base case, and other scenarios all in the one model
- Perform sensitivity analysis to identify the model’s critical assumptions
- Audit a model’s integrity using Excel’s in-built features and test data.

NOTE: This is a hands-on seminar. Participants will be required to bring a laptop with Excel (any version, but the session uses 2007). You will also be e-mailed some Excel templates in advance of the session which you will have to load onto your laptop.

SEMINAR LEADER

Lisa Dorian, CA•CIA, CPA(IL)

November 24, 2011 (ZBN)
6.5 CPD Hours

- ❖ Finance
- ❖ Performance Measurement
- ❖ Information Technology

Financing Strategies

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. The course will dive into the practical details of what capital providers are seeking, issues that arise, and how companies should prepare themselves to execute a financing transaction.

The seminar will also provide an overview of the 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. 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.

WHO SHOULD ATTEND

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

CONTENT

- Overview of financing strategy and capital markets
- Current state of the capital markets
- Basic capital structure elements
- Operating lines and term debt
- Mezzanine and subordinated debt
- Private equity
- Public equity and convertible debentures
- Understanding cost of capital
- Cost of capital and investment decisions
- Financing process

SEMINAR LEADER

Dean Schinkel, CA

December 12, 2011 (ZCD)
6.5 CPD Hours

❖ Finance – Corporate Finance

Cloud Computing

OBJECTIVE

“Cloud Computing” - what does it mean and how will it impact you both personally and professionally? In this seminar, you will learn the fundamentals of cloud computing, including what cloud computing really is and how it differs from hosted services. Leading solutions from organizations such as Microsoft, Google, Thomson Reuters, Intuit, SAP, Intacct, Amazon, Insynq, Real Time Bookkeeping and many others will be reviewed to help you understand the opportunities that exist today to move your organization forward and begin increasing the return on your investment in technology. A special focus of this seminar is the impact that cloud computing will have on the accounting profession, regardless of whether you work in public accounting, industry, or for government, education, or not-for-profit institutions.

WHO SHOULD ATTEND

Accountants and other business professionals who wish to learn about leading-edge technologies such as cloud computing and their potential to improve information services, while improving efficiency and driving down costs.

CONTENT

- Distinguishing between cloud computing, virtualization, and hosted services
- Determining if cloud computing is right for your organization or for your clients
- Identifying the major cloud computing, hosted services, and application service provider vendors and the key solutions provided by each of these vendors
- Developing a road map for selecting a cloud-based solution and migrating to it
- Recognizing the potential pitfalls associated with cloud-based solutions – such as security and data availability – and identifying means of avoiding these hazards
- Investigating data storage in the cloud

SEMINAR LEADER

Ward Blatch, BComm, CA, MCSA

February 16, 2012 (ZDH)
6.5 CPD Hours

❖ Information Technology

Excel 2007 – Advanced

OBJECTIVE

This hands on course covers six major topic areas: analyzing worksheets; functions; database features; linking (worksheets & workbooks); comment fields (inserting/deleting/editing); and macros (create, record, edit, run basic macros).

WHO SHOULD ATTEND

Experienced users of Excel.

CONTENT

Analyzing Worksheets

- Go to, special
- Precedent, dependent cells
- Auditing toolbar
- Goal seeker
- Setting up, modifying and creating scenarios
- Report manager

Functions

- Function syntax
- Date/time functions
- IF/PMT functions
- Round/concatenation functions
- VLOOKUP, HLOOKUP functions
- Protecting cells, worksheets and workbooks

Database Features

- Sorting, filtering
- Data form & validation
- Subtotal function
- Outlining
- Converting text to columns

NOTE: This is a hands on course, please bring a laptop with Excel 2007.

SEMINAR LEADER

Ricki Miles

October 24, 2011 (ZAJ)
6.5 CPD Hours

❖ Information Technology

Outlook Essentials

OBJECTIVE

Are you ready to learn the essential features in Outlook to help you manage your e-mail, contacts, and calendar more effectively? In this seminar, participants will learn how to use Outlook to become more organized, to secure messages and other critical information, and to maintain control over their calendar. Don't miss this chance to learn how to take control of the critical information stored in Outlook – the business application you likely use more than any other.

WHO SHOULD ATTEND

Accountants who work with or plan to work with Outlook.

CONTENT

- How to use basic components of the Outlook user interface such as the Navigation Pane, Message List, Reading Pane, To-Do Bar, and Outlook Today
- How to work with Outlook's Universal Drag-and-Drop feature
- How to configure Outlook's Preferences and Options
- New features in Outlook 2010 and how to put them to use for increased personal and team productivity, including:
 - Conversation View
 - Quick Steps
 - Instant Search
 - Calendar Groups
 - Schedule View
 - Social Connectors
- How to secure Outlook e-mail and attachments using techniques such as Digital Signatures, Message Encryption, and Message Preview
- How to use Outlook's Calendar more effectively using tools such as the Scheduling Assistant, Meeting Requests, Categories, Reminders, Attachments, Calendar Display, Custom Views, Shared Calendars, and Delegation

This course includes coverage of features found in Outlook 2003, 2007, and 2010.

SEMINAR LEADER

Ward Blatch, BComm, CA, MCSA

February 15, 2012 AM (ZDF)
3.0 CPD Hours

❖ Information Technology

Paperless Office

OBJECTIVE

No one expects a completely “paperless” office, but everyone would like to have much less paper to manage! This course will use best practice methods and demonstrate proven processes for document management. The instructor will guide you through the file organization and retention process from simple, inexpensive systems costing a few hundred dollars to comprehensive options complete with workflow. You will leave this seminar with a comprehensive understanding of your options and a clear direction of how to implement your own version of the Paperless Office.

WHO SHOULD ATTEND

CFO, Controller, CEO, CIO, and senior managers in general looking to improve productivity and to reduce cost.

CONTENT

- Key paperless office terms
- Steps to prepare for paperless
- Need for records retention guidelines and a records retention policy
- Three components of a paperless office
- Key characteristics of electronic file cabinet solutions and document management solutions and typical costs associated with these systems
- Key hardware requirements for moving to paperless
- Key data backup, disaster recovery, and business continuity issues
- How to integrate digitized hard copy files with documents that already exist in your system
- How to manage long-term electronic file systems
- Exporting and importing data from specialized applications such as tax or accounting software into a total document management solution
- Paperless audit and key hardware, software, and workflow tools needed to execute a paperless audit

SEMINAR LEADER

Ward Blatch, BComm, CA, MCSA

**October 20, 2011 (ZAH)
6.5 CPD Hours**

❖ Information Technology

PDF Forms – What Accountants Need to Know

OBJECTIVE

In this seminar, you will learn about the near limitless possibilities associated with PDF forms. Imagine converting timesheets, expense reports, job applications, time-off requests, and all of your other forms into interactive PDF documents that are automatically distributed. Now imagine responses collected and summarized using just a few keystrokes. Consider extending this functionality to transactional documents such as estimates, invoices, and purchase orders so that these can be prepared as interactive PDF forms and then imported into leading accounting applications, including QuickBooks.

WHO SHOULD ATTEND

Accountants who work with or plan to work with PDF forms.

CONTENT

- Three different ways PDF forms can be created and how to create PDF forms using each approach
- How to add calculations to your forms
- Need to secure PDF forms and techniques for doing so
- Three different means of distributing PDF forms and the relative advantages of each along with the process for distributing forms using each methodology
- How to collect and summarize responses using Adobe’s Tracker feature
- How to integrate data collected from PDF forms into other applications

This course includes coverage of features found in Adobe Standard and Pro Version 9 and introduction to the features in the new Adobe Standard and Pro X version.

SEMINAR LEADER

Ward Blatch, BComm, CA, MCSA

**February 15, 2012 PM (ZDG)
3.0 CPD Hours**

❖ Information Technology

PowerPoint Essentials

OBJECTIVE

This course provides you with the skills you need to create captivating and compelling PowerPoint presentations, along with tips on how to enhance your PowerPoint slideshows. In this seminar, you will go beyond the basic steps to create simple presentations and learn how to use tools to ensure your presentations have a clean and consistent design and that your message comes across loud and clear. PowerPoint Essentials is just the course for those starting out with PowerPoint as well as those who desire to enhance their self-taught PowerPoint skills.

WHO SHOULD ATTEND

Accountants and financial professionals who use or desire to use PowerPoint to create compelling and captivating presentations.

CONTENT

- Basic steps required to create a simple PowerPoint presentation
- How to create clean, concise, and consistent slides using templates, themes, masters, and charts
- Apply animation and special effects using techniques such as:
 - animation schemes
 - custom animation
 - animating charts and graphs
 - slide transitions
 - timings
 - narrations
 - screenshots
 - multimedia
- Techniques and tips for enhancing a PowerPoint slideshow, including:
 - custom shows
 - presenter view
 - self-running presentations
 - “countdown” slides
 - keyboard shortcuts
 - built-in laser pointer
 - embedded excel files

This course includes coverage of features found in PowerPoint 2003, 2007, and 2010.

SEMINAR LEADER

Alan Salmon

**December 1, 2011 PM (ZBV)
3.0 CPD Hours**

❖ Information Technology

Technology for Accountants - Don’t Get Left Behind

OBJECTIVE

Technology continues to accelerate rapidly and accountants need to keep pace. This course is designed for those who are not information technology (IT) experts, but who need an update of their base-knowledge level to serve their companies and/or clients more efficiently and effectively.

In this course, you will survey today’s IT environment, learning about computer hardware, software, operating systems (including Windows 7) and what it means for you. You will also learn about significant trends in information technology, how to take advantage of the opportunities presented by these trends, along with tips to improve the overall performance of your IT investment.

WHO SHOULD ATTEND

Accountants in public practice or industry who use information technology and/or who are responsible for managing information technology for their firms, clients, or companies.

CONTENT

- Key hardware and software enhancements and updates that are relevant to accountants
- Key features in Office 2010 and how to apply them
- Key features found in Adobe Acrobat for working with Portable Document Files
- Key security and privacy issues facing accountants, including practical tools and techniques for mitigating risk such as Encrypting Data and Disks, Password Policies, and Portals

SEMINAR LEADER

Alan Salmon

**December 1, 2011 AM (ZBU)
3.0 CPD Hours**

❖ Information Technology

Advanced Internet Research Techniques for Accountants

OBJECTIVE

Are you a Google zombie? If you type a word or two into Google.com, hit enter and hope for the best, you're missing 99% of online information and tapping only a tiny fraction of Google's search power.

Practical, concise and fun, this seminar can exponentially improve your online search skills, immediately increase your web productivity, and instantly transform how you use the web in your business and personal life. Even if you think you're web savvy, you are guaranteed to learn new search strategies, techniques and tools that will take you to the next level of online intelligence gathering.

WHO WILL BENEFIT

Anyone who uses the Internet. The seminar is especially relevant for professionals who rely on the web to gather information on clients, business leads, industry developments and changing government regulations.

CONTENT

- Google's hidden biases, limitations and costs
- Top Google search tools (including many you have never heard of)
- Other search applications from verticals to information moshpits
- How to get the latest and best information to come to you and automatically monitor your favourite websites
- Create an online research dashboard that aggregates information
- How to increase search accuracy using time, place and lingo "tags"
- Uncover hard-to-find information using Google "yoga"
- Create Google "super alerts" that slice through the cyber-clutter and automatically generate and deliver the most relevant results

SEMINAR LEADER

Garrett Wasny, MA, CMC, CITP

February 23, 2012 (ZDJ)
6.5 CPD Hours

- ❖ Information Technology
- ❖ Organizational Effectiveness, Control & Risk Management

BlackBerry - Learn How to Use Your BlackBerry™

OBJECTIVE

This two-hour webinar is designed to help you use this exciting piece of technology efficiently and easily.

Based on hands-on training, the student is given 24 hour a day access for 60 days so they can go through all of the exercises at their own pace. The student logs in through their PC. Using their handheld, they complete the online training which is presented in a series of Flash films.

Organized into modules and topics, the webinar has built-in navigation tools that allow students to take lessons as many times as needed and in the order they desire.

WHO SHOULD ATTEND

This webinar is valuable to anyone with a BlackBerry who would like to learn how to use it properly and effectively.

CONTENT

- Section 1: The Device
- Section 2: Security
- Section 3: E-Mail
- Section 4: Contacts
- Section 5: Telephone
- Section 6: Options

WEBINAR FACILITATED BY
Guy Couture

24 HOURS / DAY ACCESS FOR 60 DAYS FROM REGISTRATION (ZAC)
2.0 CPD Hours

Member: \$40
(OR HALF DAY PASSPORT)

Non-Member: \$45
(OR HALF DAY PASSPORT)

- ❖ Professional Skills

Budgeting and Financial Management

OBJECTIVE

This interactive workshop enables participants to understand and use financial information, adopt a disciplined approach to managing budgets, and communicate with financial specialists.

WHO SHOULD ATTEND

This seminar will be particularly valuable to members in industry who are responsible for preparing and/or approving budgets.

CONTENT

By the end of this workshop, participants are able to:

- Understand the principles of financial management and how to apply principles when making decisions that may affect financial performance
- Understand the context within which a budget must be managed in order to meet corporate reporting requirements
- Understand the responsibilities in managing a budget
- Apply the skills and knowledge to develop and manage successful budgets

SEMINAR LEADER

Lisa Dorian, CA•CIA, CPA(IL)

November 25, 2011 (ZBP)
6.5 CPD Hours

- ❖ Organizational Effectiveness, Control & Risk Management
- ❖ Performance Measurement

Building Better Business Cases

OBJECTIVE

Wise capital expenditure (CAPEX) is critical to the success of business. Yet many CAPEX business cases are littered with flaws that end up costing the company thousands of dollars. This seminar equips participants with the tools they need to better evaluate and critically monitor CAPEX business cases.

WHO SHOULD ATTEND

This seminar will be particularly valuable to members in industry and to practitioners who regularly review and evaluate CAPEX business cases.

CONTENT

- This seminar will provide participants with the knowledge and skills they need to:
- Better evaluate business cases against business strategy, long term goals and key financial objectives
 - Identify business case red flags/warning signs
 - Uncover common financial flaws
 - Generate and challenge business case options
 - Identify and evaluate risks
 - Evaluate the relative importance of cost avoidance and intangible benefits
 - Ensure implementation plans are rigorous with robust controls and milestones

SEMINAR LEADER

Lisa Dorian, CA•CIA, CPA(IL)

November 23, 2011 (ZBM)
6.5 CPD Hours

- ❖ Organizational Effectiveness, Control & Risk Management
- ❖ Performance Measurement

Building Bridges Across Cultures

OBJECTIVE

Recent data shows that the population of Manitoba is becoming increasingly culturally diverse. While this diversity adds to the richness of the province, many organizations also report experiencing new challenges with both clients and internal staff based upon cultural differences. This workshop will help individuals and organizations build bridges across cultures and develop skills for cross-cultural communication.

WHO SHOULD ATTEND

Relevant to everyone, this seminar will be of particular interest to those who are interested in exploring how Canadian culture varies from other cultures.

CONTENT

This workshop will provide participants with an understanding of what culture is and how other cultures vary from Canadian culture.

Participants will be challenged to identify how much they know about the demographic profile of Manitoba based upon census information.

SEMINAR LEADER

Priti Shah, B.A., LL.B., C. Med.

November 14, 2011 AM (ZBD)
3.0 CPD Hours

❖ Professional Skills

Business Etiquette in the Digital Age

OBJECTIVE

We've already mastered traditional business etiquette such as saying hello to coworkers when passing them in the halls and shaking hands with people we meet. Even with the last generation of new technology, business etiquette has started to become automatic. Most people remember to turn off the volume on their cell phones during meetings and understand that we shouldn't be sending emails using all caps.

As new communication tools emerge, it's easy to forget that how we use them can impact not only our personal lives but our professional lives as well. One online mistake can follow you for years.

This interactive session will give you the answers to all questions you have on how to apply business etiquette in the digital age. It will empower participants to be able to use these new communication tools with confidence and professionalism.

WHO SHOULD ATTEND

Anyone who uses social networking sites either for business or personal use.

CONTENT

- How do we transfer the communication skills we have to the communication tools growing in popularity?
- How does business etiquette apply to the interactions we have on Facebook, LinkedIn and Twitter?

SEMINAR LEADER

Marie Antaya

October 25, 2011 (ZAK)
8:30 AM to 10:30 AM

FREE 2 HOUR SESSION
2.0 CPD Hours

❖ Professional Skills

CFO's Role in a Family Business

OBJECTIVE

Being a CFO in a family business brings significant challenge and enormous personal opportunity. Dealing with entrepreneurs and owner-managers brings with it a much different operating environment for a CFO. Learn how your skills can best be applied to drive success for your firm and walk away feeling confident that you have the tools to deal with your situation.

This workshop will provide added insight into how family business is different. Share your experiences and learn from the experience of your peers. Learn that the elements you believe are unique are common to most family business. Understand the levers to pull to contribute to the success of the family business. Understand how the family views your role.

WHO SHOULD ATTEND

This course will be useful to those responsible for providing leadership in a family business.

CONTENT

- How to succeed in your role
- Understand the different environment of family business
- Levers to pull to enhance your value to the firm
- The line in the sand not to be crossed

SEMINAR LEADER

Larry Ginsberg, FCA

November 21, 2011 (ZBK)
6.5 CPD Hours

❖ Organizational Effectiveness,
Control & Risk Management

CFO's Role to the Board of Directors

OBJECTIVE

The CFO's role continues to grow and expand far beyond the basic custodianship of the books and records. Today's CFO carries the responsibility to ensure that the overall direction of the business is consistent with the direction given by the Board of Directors.

This course provides the participants with a clear understanding of the concerns of a Board member and their role and responsibilities to the Board. The program provides the participants with a perspective on how to align the CFO's role with the objectives and needs of their fellow management team members and their Board of Directors, within the context that each organization whether public, private, large or small is different. You will learn from other participants, and a leading facilitator, how to manage and successfully accomplish your role as it relates to the Board.

WHO SHOULD ATTEND

Financial professionals in management positions who lead financial teams and want to understand their role as it relates to the Board and update their skill levels in this critical area.

CONTENT

- The CFO's primary responsibility to the Board
- How to deal with the politics inherent in reporting to the Board
- How to maintain objectivity and credibility among conflicting opinions
- How to make a sustainable contribution to the process
- Understand what a Board looks for today
- How to communicate effectively with the Board

SEMINAR LEADER

Larry Ginsberg, FCA

November 22, 2011 (ZBL)
6.5 CPD Hours

❖ Organizational Effectiveness,
Control & Risk Management

Get More Power from Your Brain

OBJECTIVE

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.

WHO SHOULD ATTEND

Anyone who works with a variety of people in different situations and wants to remember more, feel sharper and enhance their interpersonal skills.

CONTENT

- How to:
 - develop a dependable memory
 - set up conditions to fully engage your brain
 - take a more effective approach to multi-tasking
 - change habits that aren't working for you
- How sleep can enhance learning and memory
- 10 ways to keep your brain healthy
- Learn to:
 - enhance communication and interpersonal effectiveness in delivery of thoughts and ideas
 - manage stress, worry and anxiety
 - quickly identify options when faced with conflict
 - understand the role of your intuitive and kinaesthetic 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

SEMINAR LEADER

Eileen Pease, M.Ed., CHRP

**November 18, 2011 (ZBJ)
6.5 CPD Hours**

- ❖ Professional Skills

Effective Governance in the Not-for-Profit Sector

OBJECTIVE

This course examines significant aspects of governance including the impact of leadership and culture on an organization's governance performance. It deals with the tough issues that organizations must face to be effective in their governance responsibilities.

It will provide you with practical approaches, ideas and guidance to bring about highly functioning boards, management teams and auditors that fulfill their responsibilities effectively. You can lead the charge on governance, make your organization more effective and become the governance person in your organization.

WHO SHOULD ATTEND

Board members, management and auditors of not-for-profit entities such as charities, government funded agencies, professional and trade associations and chambers of commerce.

CONTENT

- Governance responsibilities as directors, board members, management and auditors
- Governance concepts
- Governance models – board and management responsibilities
- Impact of leadership and culture
- What can happen when boards fail on governance
- What have award winners done to improve governance
- What are governance best practices?
- How to evaluate governance in your organization
- How to implement best practices and improve governance

SEMINAR LEADER

Arun Mathur, CA

**February 9, 2012 (ZDE)
6.5 CPD Hours**

- ❖ Organizational Effectiveness, Control & Risk Management

Focused and Effective Leadership

OBJECTIVE

In this two hour seminar participants will learn how to reduce stress, set goals and remain focused. Key strategies and behavior of effective leaders will be discussed.

WHO SHOULD ATTEND

Anyone who feels the need to make improvements in their personal and professional productivity.

CONTENT

- How to reduce stress by recognizing and eliminating low-priority activities and competing demands on your time
- A goal setting process to help you become – and remain – more focused on top priorities
- How to build win/win agreements that leverage the strengths of your team
- The top behaviours of high-trust leaders

SEMINAR LEADER

Laurel Kidder

**October 11, 2011 AM (ZAD)
8:30 AM to 10:30 AM**

**FREE 2 HOUR SESSION
2.0 CPD Hours**

- ❖ Professional Skills

Google Productivity Tools for Accountants

OBJECTIVE

You use Google for online searches. But did you know there is a whole other side - an applications side – to Google that is often overlooked and underrated?

This session reveals that Google is not just an Internet search engine, but a huge and free suite of online productivity tools that can be used in your organization every single day. This software is not only free but also superior to Microsoft Office in many respects.

WHO SHOULD ATTEND

Professionals at all levels who use the Internet and want to learn about or increase their proficiency using Google applications.

The seminar is especially relevant to those who use e-mail, calendars, to-do lists, spreadsheets, forms, word processing, presentation tools, web publishing software, instant messaging, videos, maps, photos and mobile devices.

CONTENT

- Why use Google Apps? Pros and cons
- Google office suite
- Create, edit, share and embed Google calendars
- Google web publishing and work spaces
- Google presence
- Google location awareness
- Google communications
- Google assistance

SEMINAR LEADER

Garrett Wasny, MA, CMC, CITP

**February 24, 2012 PM (ZDL)
3.0 CPD Hours**

- ❖ Information Technology
- ❖ Organizational Effectiveness, Control & Risk Management

Improve Controls over Spreadsheets and Reduce Likelihood of Error

OBJECTIVES

Most companies employ a number of spreadsheets in their information and decision-making activities. The ease with which spreadsheets can be created makes them useful as an information processing or analytical tool but without adequate controls they can be a source of significant errors and control deficiencies. There is a need to balance ease, flexibility and portability against the importance of reliable information for management's use.

This course focuses on spreadsheet controls which would make the whole process of using spreadsheets more effective and efficient while facilitating compliance with the CFO Certification requirements.

WHO SHOULD ATTEND

CFOs, controllers, accounting managers and finance personnel of all types of organizations, as well as those who use spreadsheets to process financial and non-financial information. It will be useful to anyone who has direct involvement in the design and evaluation of internal control environments.

CONTENT

The course material provides templates for best in class spreadsheet policies and controls and a project roadmap for redesigning and improving spreadsheets so that likelihood of error is minimized.

Topics include:

- Spreadsheet risks
- Spreadsheet inventory
- Spreadsheet controls
- Redesigning of spreadsheets
- Spreadsheet control policy
- Sustaining high integrity spreadsheets
- Roles and responsibilities
- Spreadsheet enhancement project roadmap

SEMINAR LEADER

Massood Oroomchi

November 30, 2011 AM (ZBS)

3.0 CPD Hours

- ❖ Information Technology
- ❖ Organizational Effectiveness, Control & Risk Management

Improving Financial Performance for Controllers and CFOs

OBJECTIVE

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; and understand the changing business environment to be prepared for the future.

This fast-paced 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.

WHO SHOULD ATTEND

CAs in industry, including financial directors, managers, controllers and CFOs, who want to help their organization survive and prosper, and CAs who advise clients.

CONTENT

- Setting the stage
 - Cycles and history
 - New economic order
 - Financial and economic models
- Profit improvement
 - Cash management
 - Expenses and soft costs
 - Banking and bankers
 - Managing receivables
 - Managing payables
 - Capital expenditures
- 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

SEMINAR LEADER

Jeffrey Sherman, BComm, MBA, FCSI, CA

December 15, 2011 (ZCG)

6.5 CPD Hours

- ❖ Organizational Effectiveness, Control & Risk Management

Integrated Management Practices and Controls - Enhance Business Efficiencies and Strengthen Control Environment

OBJECTIVES

The objective of this course is to provide participants with a practical understanding of the best practices in management techniques.

WHO SHOULD ATTEND

Finance, HR, planning and risk management leaders, who wish to develop an understanding of integrated management practices and controls which would lead to business efficiencies and stronger internal control environments.

CONTENT

- Overview of management best practices
- Risk management policies and procedures on an entity-wide basis
- Strategic planning process
- Budgeting and forecasting processes
- Management reporting
- Human resources policies and practices
- Annual cycle of management practices
- Meeting a substantial portion of Internal Control Considerations recommended in COSO

SEMINAR LEADER

Massood Oroomchi

November 30, 2011 PM (ZBT)

3.0 CPD Hours

- ❖ Organizational Effectiveness, Control & Risk Management
- ❖ Performance Measurement

Leadership Effectiveness

OBJECTIVE

A successful, dynamic work environment needs people who are both effective leaders and effective managers. Both are important but most people focus on one or the other.

In this highly interactive workshop we will concentrate on leadership. You will learn how to develop a vision and enlist the aid of others to achieve it. You will also learn about other skills which will help you be recognized as a leader by those around you.

WHO SHOULD ATTEND

One can demonstrate leadership regardless of their level in an organization or their responsibilities for supervising others. This course will be beneficial to anyone interested in being recognized as a leader.

CONTENT

- Difference between being a leader and a manager
- How to improve your listening skills
- How to influence others
- Improving upon your emotional intelligence
- What to do to inspire trust and admiration
- Specific ways to capitalize on your strengths and improve your weaknesses

SEMINAR LEADER

Carolyn Cohen, CA

January 26, 2012 (ZCW)

6.5 CPD Hours

- ❖ Professional Skills

Managing Your Career

OBJECTIVE

A troubled economy forces everyone to take a closer look at their career direction/options. Even in prosperous times, it is essential to actively manage your work life rather than leaving it to chance. In this seminar you will learn to articulate your professional goals, analyze your strengths and preferences, seek new challenges that are compatible with your aspirations and identify when change is the way to go.

WHO SHOULD ATTEND

This seminar will be helpful to anyone who is or is planning to be employed. Even if you have taken a critical look at your career choice in the past, it is essential to periodically re-examine your goals and if you are a manager, to help your staff do the same.

CONTENT

- How to make an honest assessment of your professional strengths and preferences
- How to identify what is essential to you at this time in your work life and what you can live without
- How to maintain a portfolio of professional accomplishments to aid in justifying your readiness for future opportunities
- How to assist your direct reports with their career management challenges
- More about recommitting to your current position
- How to make an informed decision about staying where you are or making a career change
- Where to begin and who you need to help if you are contemplating a change
- How to deal with direct reports who are reluctant to manage their own career
- Resources (books, periodicals, websites)

SEMINAR LEADER

Carolyn Cohen, CA

January 27, 2012 (ZCX)

6.5 CPD Hours

- ❖ Professional Skills

MB Check-Up - A Presentation on Living, Working and Investing in Manitoba

OBJECTIVE

The Institute of Chartered Accountants of Manitoba produces *MB Check-Up* each year to measure the province as a place in which to live, work and invest and see how we compare to the other western provinces, Ontario and the Canadian average. Participants will see what is happening in the provinces now and explore economic trends and what they indicate for Manitoba's future.

WHO SHOULD ATTEND

All CAs and their business associates who are interested in seeing how Manitoba measures up as a place to live, work and invest.

CONTENT

Gary Hannaford, FCA, CEO of the Institute of Chartered Accountants of Manitoba presents the results of *MB Check-Up*, an in-depth economic analysis of 11 key indicators that rank our provinces as a place to live, work and invest.

SEMINAR LEADER

Gary Hannaford, FCA

October 31, 2011 AM (ZAR)

8:30 AM to 10:30 AM

FREE 2 HOUR SESSION

2.0 CPD Hours

- ❖ Professional Skills

Overview of the Legal Fundamentals of Hiring, Disciplining and Terminating Employees

OBJECTIVE

This session will provide an overview of key legal issues arising over the life of the employment relationship from hiring through performance management to termination. Participants will receive a comprehensive summary, become more aware of all the issues relating to hiring and termination of employment and learn a practical framework for planning.

WHO SHOULD ATTEND

Anyone who deals with the Employment Standards Act, especially those involved with human resources.

CONTENT

The focus is on practical advice to avoid legal claims in the hiring process, ensuring that performance problems are properly documented to support possible discipline and understanding potential liabilities on termination. Strategies to minimize costs and the impact on the organization/employees will be discussed.

SEMINAR LEADER

Adrian Frost, B.A., LLB.

January 31, 2012 AM (ZCZ)

3.0 CPD Hours

- ❖ Professional Skills

Peak Corporate Performance - Creating a Performance Framework

OBJECTIVE

This course helps participants develop the link between a company's strategy and performance. It will illustrate how to use performance measurement tools to align corporate goals and targets with corporate performance.

Through the use of a balanced scorecard for the implementation of strategies, activity-based costing for evaluating specific profitability, risk analysis, and supplier and customer relationships, businesses will be able to achieve corporate objectives sooner.

WHO SHOULD ATTEND

Senior leadership and managers.

CONTENT:

- Transform strategy into specific goals, objectives, and measures
- Effectively use the Balance Scorecard to create results
- Understand risk elements
- Understand the role of activity based costing
- Implementing cost management and performance management control systems while maintaining management accountability, corporate governance and fiscal certainty
- Create a framework to execute strategy and measure performance

SEMINAR LEADER

Bruce Acton, BSc, MBA, FCMC

November 29, 2011 (ZBR)

6.5 CPD Hours

- ❖ Organizational Effectiveness, Control & Risk Management

Presenting with Impact

OBJECTIVE

The mind is a wonderful thing - it starts working the minute you're born and never stops until you get up to speak in public.
(Roscoe Drummond)

Presenting with impact is much more than simply giving a speech. It is the ability to present information clearly, persuasively, and memorably so that you gain the listeners' attention and capture their interest. After all ... although language is our system for transporting ideas, for communicating our thoughts to others ... it is only a means to an end, not an end in itself. Effective communication does not take place until the information has been received and clearly understood.

WHO SHOULD ATTEND

People who control the effectiveness of spoken communication and have the ability to present with impact are frequently seen as leaders both within their workplace and their community. For anyone who has a desire to develop these skills, this seminar is for you!

CONTENT

This interactive session will focus on enhancing your presentation skills from two perspectives:

Preparation

- determining your focus
- planning your content
- using notes
- dealing with anxiety

Delivery

- connecting with the audience
- opening and closing effectively
- building bridges between points
- using body language
- using effective audiovisual aids

SEMINAR LEADER

Maureen Kennedy

December 6, 2011 AM (ZBY)

3.0 CPD Hours

- ❖ Professional Skills

Project Management: Tips and Traps

OBJECTIVE

This seminar focuses on how to organize a project for success in a realistic and effective manner. Project management is fundamental to an organization's success; essentially, it is the organization of resources to meet time-specific outcomes.

WHO SHOULD ATTEND

Senior managers seeking a greater understanding of project management, how to identify improvement opportunities and apply project management skills to improve an organization.

CONTENT

The seminar will address:

- Overview of Project Management (PM)
 - why a company should use it
 - who should use it
- Necessary steps to implement a PM approach
- Components of a good plan
 - how to organize for success
 - identify potential barriers
- PM best practices and how to use them
- Practical problems associated with PM

SEMINAR LEADER

Bruce Acton, BSc, MBA, FCMC

November 28, 2011 (ZBQ)

6.5 CPD Hours

- ❖ Organizational Effectiveness, Control & Risk Management

Rules of Victory – Lessons from *The Art of War*

OBJECTIVE

For 2500 years, Sun Tzu's *Art of War* has been a guide to leaders who want to achieve success without getting bogged down in further conflict – to attain victory without fighting.

This seminar demonstrates how the skilful actions from this famous strategy manual can apply to you and your life. *The Art of War* is not about an ancient approach from a foreign culture. Rather, it presents inherent human wisdom about a way of viewing and being in the world that gives rise to skilful action.

WHO SHOULD ATTEND

Anyone who is a leader or who plans to be a leader.

CONTENT

- Our interconnectedness with the natural world and with human systems
- Developing a larger view
- Applying a disciplined, systematic approach and acting at precisely the right moment to attain success
- Knowing by listening, first to oneself and recognizing one's preconceptions, biases and prejudices, hopes and fears – then being open to listening to others in a way that enables you to understand from their point of view
- Principle of Shih
- Victory without fighting, being inclusive and benefitting the whole
- How to work more effectively with resistance, reaction, conflict, and chaos, when your role as a leader requires you to encourage change
- How to create momentum and bring about the tipping point in your project

SEMINAR LEADER

Eileen Pease, M.Ed., CHRP

November 17, 2011 (ZBI)

6.5 CPD Hours

- ❖ Professional Skills

Social Media for Accountants

OBJECTIVE

You've seen Twitter, Facebook, LinkedIn, YouTube and other social media in the headlines. But what's in it for accountants? Social media is an exploding new channel for business and if you're not familiar with at least the basics of social media, you're missing a gold mine of information and putting yourself and your organization at a serious competitive disadvantage.

Practical and illuminating, this session cuts through all the hype and explains the basics of social media and how it can be used to boost your career and organization. This seminar provides participants with the knowledge and skills they need to use a range of social media applications and be more comfortable, confident and productive online.

WHO SHOULD ATTEND

CAs at all levels who use the Internet. The seminar is especially relevant for those involved in client service, business development, recruiting or training.

CONTENT

- Why social media is a whole new system of generating and perceiving value
- Leading social media tools and how to use them
- Get tips on Facebook, LinkedIn, Flickr, YouTube, iTunes, and Wikipedia
- Learn how to add social media gadgets to your existing website for free
- Challenges and risks of social media and why they should not be underestimated
 - from employee productivity concerns to confidentiality and security issues
- How organizations the world over are using social media for recruiting, professional development, marketing and more
- Key business lessons learned to date and what to expect in the near future
- Social media best practices
 - key dos and don'ts

SEMINAR LEADER

Garrett Wasny, MA, CMC, CITP

February 24, 2012 AM (ZDK)

3.0 CPD Hours

- ❖ Information Technology

The Power of Choice – Are You Using It?

OBJECTIVE

One of our greatest gifts as human beings is the gift of conscious choice. When we make choices, we define who we are. Yet, because of the demands and high stress of today's world, we often don't recognize the extent to which we have choices and the sense of being in control of our lives that comes with it. Instead, we often allow ourselves to slide into maintenance mode and simply make it through each day, based on old and unproductive habits.

To what extent are you using the power of choice to enhance your life on a daily basis? Are you choosing activities, attitudes and belief systems that will help you achieve what is important to you? Or do you feel more like a "dancing puppet" with someone else pulling the strings?

WHO SHOULD ATTEND

Everyone who is interested in gaining a greater sense of control in their lives by building awareness of how we can use the power of choice on a daily basis.

CONTENT

In this interactive seminar, you will have the opportunity to explore the concept of choice and to assess the degree to which you are currently using it. The session is based on activities and practical tools that are designed to build awareness regarding how we choose and use:

- our response and attitude to events
- the power of our language and self-talk
- the importance of acknowledging our daily achievements
- the power of our habits
- a balanced life based on our values

SEMINAR LEADER

Maureen Kennedy

February 28, 2012 (ZDM)
6.5 CPD Hours

- ❖ Professional Skills

Transformative Leadership – Skills for CEOs, Board Chairs and Other Team Leaders

OBJECTIVES

This highly interactive and engaging workshop will help you identify and enhance your leadership impact.

WHO SHOULD ATTEND

CEOs, board chairs and team leaders; this seminar will benefit anyone who is moving into or currently in a position that involves leading and supervising others.

CONTENT

Qualities of a transformative leader

- Building team dynamics
- Strengthening group decision-making
- Strategies to avoid group think

SEMINAR LEADER

Priti Shah, B.A., LL.B., C. Med.

November 14, 2011 PM (ZBE)
3.0 CPD Hours

- ❖ Professional Skills

What's Next – Charting Your Way Towards a Purposeful Retirement

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 and 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 individuals in their 50's and beyond, this seminar is for those who appreciate that financial security is merely one of the many factors leading to success in the second half of life and retirement.

CONTENT

- 10 success factors of retirement and re-engagement
- Personal balance sheet
 - re-assessing your concerns and core values at this stage of life
- What to expect
 - the 3 common stages of the retirement transition
- Identify current strengths, define and integrate your workplace accomplishments as part of the preparation towards a meaningful re-engagement
- What you must know to avoid common pitfalls of this transition
- Explore new ways to leave a positive legacy at work
- Neuroplasticity
 - how to keep the brain thriving as we age
- Practical understanding of the foundational Triangle of Wellbeing
- Examples of people who have achieved a fulfilling re-engagement
- Create an engaging vision, mission statement, and action plan for your best future

SEMINAR LEADER

Isabelle St. Jean

February 8, 2012 (ZDD)
6.5 CPD Hours

- ❖ Professional Skills

PSAB 101

OBJECTIVE

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 provided to assist in understanding the application of the recommendations.

WHO SHOULD ATTEND

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*.

CONTENT

- Financial statement concepts and objectives
- Defining the government reporting entity
- Financial reporting
- Investments
- Government partnerships
- Investments in government business enterprises
- Restricted assets and revenue
- Tangible capital assets including leased tangible capital assets
- Liabilities, contingent liabilities and contractual obligations
- Long-term debt
- Employment benefits
- Government transfers
- Solid waste landfill closure and post-closure liability
- Tax revenue
- Exposure drafts, discussion papers, transitional provisions

SEMINAR LEADER

John Kelly, FCA

December 2, 2011 (ZBW)
6.5 CPD Hours

- ❖ Performance Measurement

PSAB Government Not-For-Profit Organizations

OBJECTIVE

The objective of this seminar is to provide participants with an understanding of the *PSAB Handbook's* standards for government not-for-profit organizations, the application of those standards and the impact the standards have on the reporting of government financial statements.

Key recommendations of the *PSAB Handbook* (in particular, the 4200 series) and their application are reviewed, and a variety of examples are provided to assist in understanding the application of the recommendations.

WHO SHOULD ATTEND

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 government not-for-profit organizations.

CONTENT

- Financial statement presentation
- Contributions – revenue recognition
- Contributions receivable
- Capital assets
- Collections
- Controlled and related entities
- Related party transactions
- Disclosure of expense allocations
- Projects, exposure drafts and discussions

SEMINAR LEADER

John Kelly, FCA

November 7, 2011 PM (ZAZ)

3.0 CPD Hours

- ❖ Performance Measurement

PSAB Update

OBJECTIVE

This half-day seminar will provide up-to-date information to keep you current on the recent releases of the Public Sector Accounting Board and the current proposals they are considering.

WHO SHOULD ATTEND

This seminar will be particularly valuable to those who prepare, audit, use, or provide advice on public sector financial reports.

CONTENT

- Government organizations
- First-time adoption of the PSA Handbook
- Financial instruments
- Foreign currency
- Government transfers

PREREQUISITE

Participants should have a general knowledge of the PSA Handbook.

SEMINAR LEADER

Tim Beauchamp, CMA

November 7, 2011 AM (ZAY)

3.0 CPD Hours

- ❖ Performance Measurement

Agricultural Tax Update 2011

OBJECTIVE

This seminar is designed to provide accountants who provide tax advice to the agricultural sector a review of special tax rules associated with this industry. The seminar focuses on a review of key income tax considerations related to partnerships, incorporation, transfers of the family farm among family, estate planning considerations and treatment of surface rental payments. In addition, the seminar will review some recent court cases of interest related to the agricultural sector.

WHO SHOULD ATTEND

Practitioners who are involved in tax compliance and planning for clients in the agricultural sector.

CONTENT

By the end of this seminar, participants will better understand some of the special income tax rules surrounding the taxation of farmers.

Topics include:

- Overview of farming
- Farm partnerships
- Incorporation of farms
- Family farm transfers
- Estate/retirement planning
- Surface rentals and farming income
- Recent cases of interest
- Principal residence exemption
- Income splitting
- Will planning
- GST issues

SEMINAR LEADER

Geoff Garland, CA

October 25, 2011 PM (ZAL)

3.0 CPD Hours

- ❖ Taxation

Catching Up - 5 Years of Income Tax Developments

OBJECTIVE

Income tax changes and evolves over time. This seminar provides an opportunity to "catch up" and learn about the more significant income tax developments that have occurred during the past five years. By attending this seminar, participants will gain a better understanding of recent tax developments and will be able to identify areas in which they may require further professional development.

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.

CONTENT

- Calculation of income
- Deductibility of expenses
- Capital cost allowance
- Taxation of capital gains
- Retirement savings
- Income splitting
- Tax credits, carry-forwards and other deductions
- Rules that defer, deem, trigger, prevent or reduce income taxes
- 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

John Granelli, CA

January 12, 2012 (ZCQ)

6.5 CPD Hours

- ❖ Taxation

Everyday Income Tax Issues for the General Practitioner

OBJECTIVE

This 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.

WHO SHOULD ATTEND

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

CONTENT

- Incorporation and integration issues including:
 - recent developments
 - eligible dividend issues
- Remuneration issues including:
 - salary reasonableness
 - income splitting
 - bonuses payable
 - employees vs. contractors
- Expenses/assets with both a personal and business element including:
 - meals and entertainment
 - automobiles
 - taxable benefits
- Shareholder benefit and loan issues including:
 - debit balances
 - housing loans
 - benefits
- Timely and topical practical matters of interest to practitioners
- Practitioners' library of facts, figures, deadlines, income tax resources, ideas
- Small business deduction including criteria, management fees and personal service businesses
- Common traps and pitfalls illustrated through practical, realistic examples and situations

SEMINAR LEADER

Denise Lammi, CA

November 9, 2011 (ZBB)
6.5 CPD Hours

❖ Taxation

General Practitioners "Need to Know"

OBJECTIVE

There are important income tax issues that general practitioners need to be able to identify but might miss because they have not learned about them, appreciated their importance, or considered them in relevant contexts. Practitioners may not fully appreciate the significance of the particular tax issue because they have not been shown how it might apply to common transactions.

Detailed information and commentary will be provided which describes the income tax rules for each "need to know" subject and will explain 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 should a problem arise.

WHO SHOULD ATTEND

General practitioners.

CONTENT

- Common transactions with shareholders
- Appropriation of corporate assets considerations
- Inter-corporate 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
- Many other important matters of interest to a general practitioner

SEMINAR LEADERS

Ken Grower, FCA and Geoff Garland, CA

November 4, 2011 (ZAX)
6.5 CPD Hours

❖ Taxation

GST/HST Refresher for Professionals

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 seminar provides an overview and general refresher on a selection of GST/HST issues a practitioner may encounter when working with clients in various industries. Participants will gain 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.

WHO SHOULD ATTEND

General practitioners, company accountants and other advisors who provide advice on, or participate in, a range of business transactions.

CONTENT

- Fundamentals including HST place of supply rules
- Supplies
 - identification of what is a taxable supply
- Registration, collection and reporting
- Input tax credit and rebates
- Real property
 - identification of important exemptions
 - self-assessment rules
- Cross border and non-resident issues
 - import/export
 - transport
 - dealing with non-residents
- Administration and enforcement
 - audit
 - objection
 - interest and penalties

SEMINAR LEADER

John Granelli, CA

January 11, 2011 (ZCP)
6.5 CPD Hours

❖ Taxation

Income Splitting

OBJECTIVE

This seminar addresses the tax benefits of income splitting, including a detailed review of the attribution and split income rules, which commonly impede access to these benefits. Methods of splitting income without offending these rules will be discussed in detail.

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.

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.

CONTENT

- Benefits of income splitting
- Impact of eligible dividend rules on income splitting
- Attribution rules
- Related legislative sections of the Income Tax Act
- Common strategies for splitting income with
 - spouses
 - minor children
 - adult children
- Inter-provincial income splitting opportunities
- Planning techniques to achieve income splitting
- Pitfalls to avoid

SEMINAR LEADER

Brian Janzen, CA

January 18, 2012 AM (ZCS)
3.0 CPD Hours

❖ Taxation

Income Tax Issues for the File Preparer

OBJECTIVE

Accountants who prepare files and income tax returns often see the issues, problems and opportunities first. This seminar focuses on matters more relevant to the "front line" firm members. Planning, problems and approaches will be emphasized because in real life, client situations don't come with an instruction manual.

WHO SHOULD ATTEND

The ideal participant is a technician, para-professional, newly qualified accountant or staff accountant who has general income tax knowledge. They should be one who deals with small and medium-sized businesses that are owner-managed and who prepares the file and/or tax return.

CONTENT

- Incorporation and integration issues including recent developments and eligible dividend issues
- Remuneration issues including:
 - salary reasonableness
 - income splitting with family members
 - bonuses payable
 - employees vs. contractors
- Expenses/assets with both a personal and business element including:
 - meals and entertainment
 - automobiles
 - taxable benefits
- Shareholder benefit and loan issues including:
 - debit balances
 - housing loans
 - benefits
- Timely and topical practical matters of interest to file preparers
- Practitioners' library of facts, figures, deadlines, income tax resources, ideas
- Small business deduction including:
 - criteria
 - management fees
 - personal service businesses
- Common traps and pitfalls illustrated through practical, realistic examples and situations

SEMINAR LEADER

Denise Lammi, CA

November 10, 2011 (ZBC)

6.5 CPD Hours

❖ Taxation

Income Tax Update 2011

OBJECTIVE

This seminar provides a detailed summary of tax law changes in the past year. It examines current changes in taxation that affect individuals and most businesses in the private sector.

For almost a decade the Auditor General has commented on the CRA's application of penalties, and waivers of penalties and interest. In response, the CRA has tightened up the application of penalties and the procedures required for a waiver of interest. This course will include an update on the interest and penalty provisions in the Act along with related matters.

WHO SHOULD ATTEND

CAs who need current information to advise clients, deal with the CRA and expand their knowledge on timely tax issues.

CONTENT

- Tax rate changes/integration
- Federal budget
- Information from CRA and the Department of Finance
- Tax cases
- CRA technical interpretations
- Changes to interest payments and charges
- Review of penalty changes and new penalties including:
 - changes to information return penalties
 - failure to file penalties
 - returns filed in an incorrect format
- Changes to taxpayer relief and voluntary disclosure provisions
- Changes to CRA administrative procedures
- Provincial update

SEMINAR LEADERS

Brian Anderson, CA and Ken Grower, FCA

October 21, 2011 (ZAI)

December 9, 2011 (ZCC)

January 6, 2012 (ZCL)

February 3, 2012 (ZDB)

6.5 CPD Hours

❖ Taxation

Not-For-Profit Organizations and Registered Charities – Taxation Issues

OBJECTIVE

The non-profit sector covers a wide spectrum of activities including clubs and professional associations, schools, hospitals, supportive housing and services and other charitable works. This seminar addresses the tax issues specific to organizations carried on for not-for-profit purposes.

Not-for-profit tax rules are substantially different from those applicable to private sector organizations. In addition, the application of GST to the activities of not-for-profit entities and its recovery through rebates and input tax credits is usually far more complex than in a commercial enterprise and may vary 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 or its directors.

WHO SHOULD ATTEND

This seminar will be of particular value to individuals in the not-for-profit sector and to practitioners who audit or provide advice to registered charities or not-for-profit entities.

CONTENT

- Tax compliance requirements
- Canadian tax rules with respect to revocation of tax exempt status and planning techniques to minimize this risk
- Latest proposed and enacted tax legislation affecting these entities
- GST basics including relevant HST place of supply rules
- Definition of various types of public service bodies
- Review of GST/HST exemptions
- Grants, donations and fund-raising activities
- GST/HST rebates and input tax credits entitlements
- GST registration and accounting
- Common pitfalls and errors

SEMINAR LEADER

John Granelli, CA

January 13, 2012 AM (ZCR)

3.0 CPD Hours

❖ Taxation

Practising Safe Tax

OBJECTIVE

This seminar is designed to help professional advisors reduce their exposure to liability in their tax practices. The seminar focuses on the procedures and processes of practicing in the area of tax, highlighting areas where a better job could be done to protect practitioners from liability.

The seminar also includes a discussion of technical issues associated with the areas where AICA claims experience show the greatest number and dollar value of claims. Participants will also obtain information to use in developing a safe foundation for their tax services.

WHO SHOULD ATTEND

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

CONTENT

- Management and administration
- Tax services responsibility
- Dealing with the CRA
- Researching tax law
- Taxpayer relief provisions, collections and third party liability
- Tax compliance
- Tips and traps
- GAAR
- Worst case scenario – malpractice lawsuit
- Top 10 liability insurance problems

SEMINAR LEADERS

Ken Grower, FCA and Geoff Garland, CA

October 26, 2011 AM (ZAM)

3.0 CPD Hours

❖ Taxation

Restructuring Private Corporate Groups

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.

Participants will learn 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.

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.

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 basic documentation required
- Identify issues involved in implementing the solution

SEMINAR LEADERS

Ken Grower, FCA and Geoff Garland, CA

October 26, 2011 PM (ZAN)
3.0 CPD Hours

❖ Taxation

RIP - Tax Estate Planning to Minimize Tax Leakage

OBJECTIVE

This seminar will provide a detailed review of important estate planning matters for practitioners who deal with the owner-managed client. Participants will develop a working understanding of how to initiate and carry out estate planning for clients. An important area of the course is the management of estate planning risk.

WHO SHOULD ATTEND

This seminar will be most beneficial to practitioners who have a good understanding of the testamentary tax rules and want to identify and address estate planning needs for the owner-manager or high net worth individual.

CONTENT

- Planning for death
- Post mortem planning
- Planning use of trusts
- Use of life insurance in planning
- U.S. estate tax review

SEMINAR LEADER

Brian Janzen, CA

February 6, 2012 (ZDC)
6.5 CPD Hours

❖ Taxation

Scientific Research and Experimental Development Tax Credits

OBJECTIVE

The Scientific Research and Experimental Development Program (SR&ED) provides federal tax credits of over \$4.5 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 credit. This practical seminar will provide the information needed to advise clients and to guide them through the documentation and claim process.

WHO SHOULD ATTEND

Accountants in public practice or industry, R&D project managers and researchers in a field of science or technology.

CONTENT

- Overview of the "technology" eligibility criteria
- Introduction to documentation requirements
- Eligible costs including areas where judgment is required
- Integration of significant tax court precedence set during the past 20 years
- Completion of all related tax forms

NOTE: This course has been updated to include the changes to legislation and administrative policies up to July 15, 2011. It uses case study format to work through preparation of a claim.

SEMINAR LEADER

Brian Anderson, CA

January 25, 2012 (ZCV)
6.5 CPD Hours

❖ Taxation

Subcontractor vs. Employee - *What Every CA Should Know*

OBJECTIVE

In this session we will look at the current tax and legal state of employees versus subcontractors, from both the employer's perspective and the employee's perspective. We will look at why you may want to engage a contractor versus hire an employee, and ways in which both sides can protect themselves from a reassessment from Canada Revenue Agency.

SEMINAR LEADER

Sean Marek, CA

October 12, 2011 (ZAE)
8:30 AM to 10:30 AM

FREE 2 HOUR SESSION
2.0 CPD Hours

❖ Taxation

Tax Decisions with Long Term Implications

OBJECTIVE

This 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 course materials to help identify tax issues and opportunities for their clients, enabling them to provide value-added services to clients.

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

WHO SHOULD ATTEND

This seminar is best suited for general practitioners who have a basic knowledge of tax matters and who deal with owner-managed small businesses.

CONTENT

- Shareholder agreements
- "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

SEMINAR LEADERS

Ken Grower, FCA and Geoff Garland, CA

January 20, 2012 (ZCU)
6.5 CPD Hours

❖ Taxation

Tax for Controllers

OBJECTIVE

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 of common problem areas. This seminar will help controllers stay current on a broad range 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 tax strategies. 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. This seminar could also benefit practitioners who provide advice in these areas.

CONTENT

- Human resources
- Sales issues
- Purchasing issues
- Capital assets
- Financing issues
- Structural issues
- Other compliance issues
- Audits and appeals

SEMINAR LEADER

Alexander (Sandy) Stedman, CA

October 17 and 18, 2011 (ZAF)
2 Days
13 CPD Hours

❖ Taxation

Tax Issues in Real Estate - *What do you need to know?*

OBJECTIVE

This seminar identifies and reviews all the significant income taxation issues arising in various aspects of real estate activities. The seminar focuses on income tax rules, however GST and provincial tax issues are also identified for consideration.

By the end of this seminar, participants should have the ability to identify specific tax rules related to real estate development and understand the tax issues involved in dealing with most common forms of real estate investment.

WHO SHOULD ATTEND

The seminar is aimed at individuals who want to gain an understanding of specific tax rules and related issues that arise when dealing with all aspects of real estate activities. It will benefit practitioners in public practice and members in industry who need to be aware of and/or work with taxation issues arising in real estate transactions.

CONTENT

- Alternative structures for investment in real estate
- Pre-acquisition issues
- Acquisition and holding property
- Development issues
- Holding properties
- Dispositions of property
- Other issues, including GST and HST
- Provincial matters

SEMINAR LEADER

Brian Janzen, CA

December 16, 2011 (ZCH)
6.5 CPD Hours

❖ Taxation

Tax Planning for Private Enterprises on Business Succession

OBJECTIVE

Business succession involving closely-held private enterprises can range from an intra-family estate plan to an arm's length transfer of shares. 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 main focus will be on income tax considerations, although key non-tax issues will also be identified. Salient tax considerations will be discussed and illustrated by reference to examples.

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.

CONTENT

- Identifying business succession alternatives
- Principal tax and non-tax considerations
- Estate freezes and wasting estate freezes
- Arm's length succession plans
- Utilization of family trusts to manage risks, enhance benefits
- Alter ego trusts and joint spousal trusts
- Lifetime capital gains exemptions
- Capital gains deferral rules
- Section 84.1 re-characterization rules
- Divisive reorganizations and Section 55
- Pre-sale purifications
- Corporate attribution issues
- Life insurance to fund taxes on death
- Non-competition payments and related tax issues
- Financing considerations
- Tax checklist

SEMINAR LEADERS

Ken Grower, FCA and Geoff Garland, CA

February 22, 2012 (ZDI)
6.5 CPD Hours

❖ Taxation

Taxation of Domestic Trusts - Compliance

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 and 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.

CONTENT

- Overview
- Types of trusts and their taxation
- Completion of the identification section of the T3
- Determination of income
 - review of the various types of trust income
 - how the determination of income differs between a trust and an individual
- Entering basic trust transactions
 - deemed and actual capital dispositions
 - dividend income
 - trustee fees
 - income allocations
- Basic testamentary trust
 - first year of an estate
 - application of the Executor's Year strategy
- Testamentary trust transactions
 - wind up of a spousal trust
 - claiming the principal residence exemption
 - utilizing the deceased spouse's capital gains deduction
- Family trust
 - reporting income splitting
 - capital gains allocations

SEMINAR LEADER

John Granelli, CA

January 10, 2012 (ZCN)
6.5 CPD Hours

❖ Taxation

Taxation of Domestic Family Trusts - Advanced

OBJECTIVE

This seminar focuses on advanced issues and concepts relating to trusts and estates with an emphasis on inter vivos and testamentary planning concepts and strategies.

Participants will gain an enhanced framework of 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

It will be assumed that participants are generally familiar with the taxation of domestic trusts.

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
- 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

Larry Frostiak, FCA

December 7, 2011 (ZCA)
6.5 CPD Hours

❖ Taxation

Taxation of Employee Benefits

OBJECTIVE

This seminar provides a review of the income tax implications of benefits conferred on employees by their employers.

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, enhancing their ability to advise on tax-effective employee remuneration strategies.

WHO SHOULD ATTEND

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.

CONTENT

- 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

SEMINAR LEADER

Brian Janzen, CA

January 18, 2012 PM (ZCT)
3.0 CPD Hours

❖ Taxation

Charitable Giving - A Detailed Review of Tax Issues and Planning Strategies

OBJECTIVE

There have been numerous legislative changes pertaining to charitable giving over the past several years. The objectives of this seminar are to provide participants with the necessary knowledge of these changes and other current related developments, as well as the many planned giving strategies, so they can advise philanthropic clients and/or charities on the various charitable giving opportunities.

This seminar is intended to be technical in nature and will cover, in detail, the different tax changes to planned giving as well as the tax issues that must be considered when implementing the planning alternatives.

WHO SHOULD ATTEND

Public practitioners advising high net worth clients who have, or may have, significant philanthropic objectives and intentions; advisors to charities that must understand the planned giving alternatives and planned giving consultants within charities who deal with large and/or sophisticated donors.

CONTENT

- Refresher of the various changes to the charitable giving rules over the past several years
- Gifting publicly traded securities
- Planning alternatives for other non-cash gifts
- Charitable remainder trusts
- Using private foundations
- Life insurance
- Donations on and after death – issues and planning alternatives

SEMINAR LEADER

Brian Janzen, CA

December 6, 2011 PM (ZBZ)
3.0 CPD Hours

❖ Finance
 ❖ Taxation

Creating a Financial Plan

OBJECTIVE

All Canadians should have a written financial plan. Personal financial planning services are one of the fastest growing service areas within public accounting firms world-wide. As well, many wealth management firms in Canada are offering financial planning services to traditional accounting firm clients, threatening your existing relationship. But what is a financial plan?

This course is applicable to people interested in properly managing their own affairs and to people interested in offering financial planning services to their clients – either today in public practice, or down the road in retirement as a part-time career.

WHO SHOULD ATTEND

Practitioners who advise personal clients and other professionals who want to implement a financial plan for themselves.

CONTENT

- Parts of a financial plan
 - retirement planning
 - investing
 - debt management
 - tax planning
 - estate planning
 - risk management
 - family planning and more
- How to complete various types of planning engagements
- Costs to complete a financial plan
- Technology needs
- Technical aspects of completing a plan

Each participant will receive a copy of Kurt Rosentreter's book *Wealthbuilding*.

SEMINAR LEADER

Kurt Rosentreter, CA, CFP, CLU, TEP, FMA, CIMA, FCSI, CIM

October 27, 2011 (ZAP)
6.5 CPD Hours

- ❖ Finance

Estate Planning for High Net Worth Individuals

OBJECTIVE

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

An integrated case study approach is used to review various business succession and estate planning issues, giving participants a better understanding of the tools necessary to design an effective estate plan and how they interact. You will be able to identify relevant issues related to business succession and tax minimization and learn how to overcome obstacles in the estate planning process.

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

WHO SHOULD ATTEND

General or tax practitioners seeking to expand their knowledge in this area, and members or other advisors who might advise high net worth clients on aspects of estate planning.

CONTENT

- Will planning and estate distribution
- Use of trusts
- Double taxation for shareholders of private corporations
- Overview of shareholder agreements and the estate
- Small business shares at death
- Pension planning including individual pension plans
- The role of life insurance in achieving estate planning objectives
- Overview of charitable giving strategies and private foundations
- Highlight of U.S. estate tax considerations

SEMINAR LEADER

Brian Janzen, CA

December 8, 2011 (ZCB)
6.5 CPD Hours

- ❖ Finance
- ❖ Taxation

Investing in Stocks, ETFs & Mutual Funds

OBJECTIVE

This course is designed as an introduction for investors seeking to better understand how they can invest successfully on their own, or to be better prepared to evaluate what their investment advisor has put in their portfolio.

This seminar will teach a novice investor about stocks, exchange traded funds (ETFs) and mutual funds. It will help investors select products for their RRSPs, TFSA's and other investment portfolios. It will also help them to better understand the products that their investment advisor is recommending.

WHO SHOULD ATTEND

Individuals interested in understanding more about investing in equities and mutual funds.

CONTENT

- How to select different types of stocks to invest in
- Mutual funds
- Exchange traded funds
- How to build a portfolio and whether stocks, mutual funds or exchange traded funds are the best way to invest

Note: This course will not cover technical analysis, the use of derivatives for investing, or day trading techniques.

Attendees will receive a complimentary copy of Kurt's book *Wealthbuilding* along with a booklet of reference materials, investing short cuts and key tips, essential website links, and more.

SEMINAR LEADER

Kurt Rosentreter, CA, CFP, CLU, TEP, FMA, CIMA, FCSI, CIM

October 28, 2011 (ZAQ)
6.5 CPD Hours

- ❖ Finance

E-learning is an innovative alternative to classroom learning. The convenience makes it a perfect alternative for those having difficulty attending traditional courses.

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.

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 areas 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.

PASSPORT HOLDERS RECEIVE A \$100 DISCOUNT.

ASPE: A Survey of the Standards

This course provides a detailed review of the Accounting Standards for Private Enterprises (ASPE), *CICA Handbook – Accounting, Part II*. The material does not contain a direct comparison of ASPE to IFRS (*CICA Handbook – Accounting, Part I*) or pre-changeover accounting standards (*CICA Handbook – Accounting, Part V*). Rather, it provides a detailed review of all sections of the accounting framework for private enterprises in Canada.

Oct 17 - Dec 31 (ZDY) 13 Verifiable CPD Hours
Jan 16 - Mar 12 (ZEB) 13 Verifiable CPD Hours
Member \$440 Non-Member \$540

Auditing in the New CAS Environment

The new Canadian Auditing Standards (CASs) became effective for periods ended on or after December 14, 2010. This course provides participants with a solid foundation in the practical application of the CASs. The course provides an 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.

Oct 17 - Dec 31 (ZDZ) 13 Verifiable CPD Hours
Jan 16 - Mar 12 (ZEC) 13 Verifiable CPD Hours
Member \$440 Non-Member \$540

IFRS: A Survey of the Standards

This course provides participants with a solid introduction to International Financial Reporting Standards (IFRSs) that came into effect for publicly accountable enterprises in Canada in 2011. IFRSs that are under development at the IASB with expectation for introduction after changeover will also be reviewed.

NOTE: Not all IFRSs are covered. Focus is on the IFRSs that apply to most entities which are different from pre-changeover accounting standards (*CICA Handbook – Accounting, Part V*). The material does not include a direct comparison of IFRS to pre-changeover accounting standards.

Oct 17 - Dec 31 (ZEA) 13 Verifiable CPD Hours
Jan 16 - Mar 12 (ZED) 13 Verifiable CPD Hours
Member \$440 Non-Member \$540

Income Tax Refresher - Corporate Tax

This course 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 course 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.

Oct 17 - Dec 31 (ZAA) 13 Verifiable CPD Hours
Jan 16 - Mar 12 (ZCI) 13 Verifiable CPD Hours
Member \$440 Non-Member \$540

Income Tax Refresher - Personal Tax

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

Oct 17 - Dec 31 (ZAB) 13 Verifiable CPD Hours
Jan 16 - Mar 12 (ZCJ) 13 Verifiable CPD Hours
Member \$440 Non-Member \$540

Professional Development Affiliates

Business Diagnostics Online

These established, high-level online courses will enable experienced CAs to assist clients and their organizations with business diagnostics and to realize financing opportunities in a complex and ever changing economic environment.

Completion of a *Business Diagnostic Online* course will enable a CA to:

- craft a comprehensive “size up” of an existing business operation, pinpointing external opportunities and threats, internal strengths and weaknesses
- understand “diagnostic checks” required to ensure a satisfactory degree of corporate health and staying power
- build stronger and more trusting relationships by assisting their clients with effective applications for financing

Business Diagnostics Online courses guide attendees through funding alternatives, external and internal business environment reviews, strategic direction, and risk from the perspective of a commercial banker. A detailed, real-life scenario illustrates many aspects of the content being covered throughout each course.

In the 7-module *Comprehensive* and the 1-module *FastTrack* courses, attendees are shown how to structure a request for funding and are introduced to the Enterprise Review Summary (ERS), a 5-6 page tactical document. The ERS is completed by a CA in conjunction with the client and presented to the bank along with the client’s financial statements. In addition to review questions, an optional 20-question final test is provided at the end of the course that, upon passing, generates a certificate. (The extra 5-module *Reference Series* provides greater depth to the topics covered in *FastTrack*. An additional 30-question final test is also provided.)

continued on the following page

These online courses are based on the seminar *Getting the Bank to Say Yes* and the business publication *Business Diagnostics*, 2nd Edition 2007, written by Richard Mimick and Michael Thompson.

Business Diagnostics Online - Comprehensive lasts between 6 to 7 hours, and the fast-paced *Business Diagnostics Online - FastTrack* lasts between 60 to 90 minutes; the optional test at the end of each course will take attendees an additional 10 to 15 minutes. (The *Reference Series* add-on to the *FastTrack* course provides up to 5 hours of additional online training, if required; an optional test takes attendees a further 5 minutes.)

To register for each of the Business Diagnostics Online courses, go to vubiz.com/ChAccess/CA/

CICA Continuing Education

INCOME TAX

CICA In-depth Tax Course

For dates/locations, visit the website at courses.tax.ca

CICA NATIONAL CONFERENCE ON INCOME TAXES

October 12-13, 2011 (Optional workshops October 14)
Toronto, ON
www.cpd.cica.ca/CIT

Advanced Tax Courses:

- **Corporate Reorganizations**
November 5-9, 2011 Whistler, BC
www.cpd.cica.ca/CR
- **Foundations in International Tax Course**
November 16-19, 2011, Niagara Fall, ON
www.cpd.cica.ca/IntertionalTax
- **Advanced Tax Issues for the Owner-managed Business Course**
November 19-23, 2011, Niagara-on-the-Lake, ON
www.cpd.cica.ca/ATI

Income Tax Practice Course

November 19-25, 2011, Collingwood ON
www.cpd.cica.ca/ITP

CICA Tax Market Briefs – Throughout 2011 in selected locations

INDIRECT TAX

CICA Community Tax Symposium

September 26-27, 2011 (Optional workshops September 25 & 28)
Ottawa, ON
www.cpd.cica.ca/CTS

Advanced GST/HST Courses:

- **Cross-border Transactions Course**
November 3-4, 2011, Toronto, ON
www.cpd.cica.ca/CBTC
- **Financial Services Course**
November 7-8, 2011, Toronto, ON
www.cpd.cica.ca/FSC

Customs Duty and International Trade Course

TBA – will be posted at www.cpd.cica.ca/CDIT

CICA In-depth Transfer Pricing Course

TBA – will be posted at www.cpd.cica.ca/TransferPricing

IFRS/FINANCIAL REPORTING & GOVERNANCE

IFRS Immersion 1 Course

September 19-22, 2011, Toronto, ON

October 17-20, 2011, Calgary AB
www.cpd.cica.ca/IFRSImmersion

IFRS Immersion 2 Course

December, 2011, Toronto, ON
www.cpd.cica.ca/IFRSImmersion2

Other Financial Reporting & Governance Programs

Financial Reporting and Accounting Conference (IFRS and ASPE)

September 26-27, 2011 (Optional workshops September 28)
Toronto, ON
www.cpd.cica.ca/FRAC

Public Sector and Not-for-Profit Financial Reporting Conference

October 5-6, 2011, Ottawa, ON
www.cpd.cica.ca/PublicSector

Conference for Audit Committees

November 21-22, 2011, Toronto, ON
www.cpd.cica.ca/CFAC

Unique Practice Areas & Industries

In-depth Brokers and Investment Dealers Course

Presented in cooperation with IIROC
September 7-9, 2011, Toronto, ON
www.cpd.cica.ca/Brokers

Conference on Environmental, Social and Governance Issues

October 3-4, 2011, Vancouver, BC
www.cpd.cica.ca/ESGIssues

The Investigative and Forensic Accounting Conference

October 26-28, 2011, Montreal, QC
www.cpd.cica.ca/IAFA

CICA Advanced Personal Financial Planning Conference

November 7-8, 2011 (Optional workshops November 9)
Toronto, ON
www.cpd.cica.ca/PFFPCConference

CICA Business and Industry Conference

November 29-30, 2011 (Optional workshops November 28)
Toronto, ON
www.cpd.cica.ca/BusinessIndustry

Canadian Conference on IT Audit, Governance and Security

March 26-28, 2012 (Optional workshops March 26 & 28)
Toronto, ON
www.cpd.cica.ca/ITAudit

CORPORATE FINANCE

CICA Corporate Finance – Level 1 Program

CICA Corporate Finance – Level 2 Program and

Corporate Finance Electronic Primer/Refresher Courses

CICA Corporate Finance Market Briefs – Throughout 2011 in selected locations
www.cpd.cica.ca/CorporateFinance

For more information, visit the CICA's CPD website at cpd.cica.ca. Events, dates, content are subject to change.

Canadian Payroll Association

The Canadian payroll Association (CPA) delivers comprehensive education for business professionals who have a functional responsibility for payroll. The CPA has represented the payroll community for more than 25 years. The following Canadian Payroll Association seminars are available to ICAM members at a special discounted rate.

Passport holders will receive a \$175 discount off of the rates when using their passport.

- Learning Payroll I: September 22, 2011 (ZDP)
- Learning Payroll II: September 23, 2011 (ZDQ)
- HR Fundamentals for Payroll Professionals: September 29, 2011 (ZDR)
- Payroll Accounting for the Non-Accountant: October 20, 2011 (ZDS)
- 2011 Year End & New Year Requirements: November 16, 2011 (ZDT)
- Legislative Update: 2011 Year-End: Half Day AM November 25, 2011 (ZDU)
- 2011 Year End & New Year Requirements: December 8, 2011 (ZDV)
- 2011 Year End & New Year Requirements: January 13, 2012 (ZDW)
- Taxable Benefits & Allowances: February 16, 2012 (ZDX)

For full course descriptions, dates and pricing, visit the CPA website at payroll.ca.

ctc TrainCanada® Winnipeg

ctc TrainCanada® is a local computer training company that focuses on delivering customized content based on the learning objectives of our clients. We provide concept training which focuses on practical, personalized learning goals instead of traditional "one size fits all" course outlines. ctc TrainCanada® is a privately owned national Canadian company that has trained and supported thousands of individuals over 20 years.

Services offered at ctc TrainCanada® include:

- We NEVER cancel approved courses*
- We are a Certified Microsoft Gold Partner
- On or off-site training - For groups and individuals
- Virtual Classroom Distance Training - Instructor led e-Learning
- Training in MS Office, Adobe, Corel Draw, Windows
- Business Skills training

* Our application classes will run with a minimum of 1 person; technical classes will run with a minimum of 3 people.

For a list of courses or to register, please visit our website at traincanada.com or call us at (204) 947-5867.

We are offering members and member associates of the Institute of Chartered Accountants of Manitoba a 10% discount off any advertised course.

K2 Enterprises Canada Self Study Programs INFORMATION TECHNOLOGY ONLINE COURSES

ICAM is pleased to offer an innovative approach to professional development training. In conjunction with K2 Enterprises Canada, learning can be as easy as sitting in your office or studying at home. Launched in October 2008, the following self study programs are offered by K2 Enterprises.

An Introduction to Vista FREE | 2 CPD Hours

This course focuses on the most important features accountants should know. Get the information you need today to take advantage of the features in Microsoft's newest operating system.

Excel Tips – Parts I to IV \$49 Each | 2 CPD Hours Each

Each two hour Excel 2007 Tips self study course is divided into three sections that each contain 15 tips. Upon completion of each course, you will understand more of the many shortcuts available to users of the

Microsoft Excel 2007 spreadsheet program.

Note that all these Excel courses are written for Excel 2007.

To register online, go to k2ecanada.coursehost.com, then:

1. click on the course you wish to register for
2. provide the registration information
3. enter the code: ICAMB
4. download the manual
5. work through the manual section
6. take the practice test at the end of each session
7. take the final test
8. print your CPD certificate

For further information, contact Alan Salmon at alan@k2e.ca

Other PD Opportunities

In-House Presentations and Acquisition of In-House Rights

It may be more practical and/or economical for your organization to offer courses developed by the Provincial Institutes on an "in-house" basis.

Some advantages of such presentations are:

- cost effective, flexible and convenient
- opportunity for frank discussions about how matters will be treated "in-house"
- team-building through discussion groups

IN-HOUSE PRESENTATIONS

You can arrange for an in-house presentation of most of the courses prepared by the provincial Institutes. The Institute supplies a master copy of the course materials and you supply the location, instructor, etc. The basic fee for most courses is \$500 plus \$140 per participant for a full-day session (\$75 per participant for a half-day session)

Acquisition of In-House Rights

The purchase of in-house rights gives you unlimited right to use the seminar material within your organization, in any format you choose. You will receive one master copy of each of the instructor materials and the participant materials for your use. The cost of acquiring the rights starts at \$3,000.

For further information, please contact Marie Kostiuk at (204) 924-4413 or mkostiuk@icam.mb.ca

Other Provincial Institutes

The provincial Institutes of Chartered Accountants share in the development cost of many of the seminars offered by the Institute. In addition, the Directors of Professional Development of the various provincial Institutes meet three times a year to discuss possible topics which would be of interest to CAs and to co-ordinate seminars across Canada. Consequently, many of the seminars offered by the Institute are identical to those offered throughout Canada.

There are, however, a number of seminars offered in other provinces which are not being offered in Manitoba this year. The Institute maintains information on the Professional Development programs of the other provincial Institutes. Should you wish further information on attending Institute courses offered in other Canadian centres, contact the Institute.

Other Organizations

The names and websites for several organizations that may help serve the professional development needs of special interest groups in our membership are listed on the Institute's website at icam.mb.ca under Professional Development > Other PD Opportunities > Other Organizations.

Continuing Professional Development Requirements

The CPD Program consists of two distinct requirements, Reporting Requirements and Minimum CPD Hours.

REPORTING REQUIREMENTS

All members who have not been granted a reduction in annual membership fees of 75% or more must file an annual report form by March 31, 2012, unless they meet specific exemption criteria. Members who have received a fee reduction while they are on caregiver, education or medical leave must also file a report, but may claim an exemption from completing minimum CPD hours at their option.

Members who have been granted a reduction from annual membership fees of 75% or more and who serve as directors of or in oversight positions on public interest entities must assess whether those activities require ongoing CPD and report accordingly.

Non-resident members who are members of another Provincial/Territorial Bermuda Institute/Ordre or an international accounting body with substantially similar CPD requirements need not report details of their learning activities to the Manitoba Institute, but must still report that they have complied with the CPD requirements of the other Institute/Ordre or international accounting body.

Resident members should report details of verifiable learning activities but may report only total hours for unverifiable learning activities. They must also submit a declaration that they have met the minimum CPD hours outlined below. Supporting documentation for reported verifiable learning activities must be kept for a four year period - reports are subject to verification.

Failure to file an annual report by the stated deadline may result, in extreme cases, in an automatic suspension of membership.

Please track your learning activities and file the report electronically on our website at icam.mb.ca. We encourage the use of this on-line system as detailed report and compliance status information is then accessible at any time. On-line reports for members who have attended Institute course offerings and signed the attendance sheet are automatically updated. A copy of the 2011 report form is also available on our website as a hard copy. However, when we receive a hard copy report, we will track only reported total hours – it is up to you to keep a copy of the details to support your report.

Minimum CPD Hours

Members are required to complete a minimum of 120 hours over a rolling 3 year cycle, at least 60 hours of which must be verifiable; and a minimum of 20 hours (either verifiable or unverifiable) annually.

Remember that the three year cycle is a rolling cycle. For most members, 2011 is the last year of a cycle that started in 2009. It is also the second year of a cycle that started in 2010 and the first year of a new cycle that runs from 2011 through 2013.

The Bylaws require that any shortfalls from the minimum annual and triennial requirements must be reported to the Professional Conduct Committee.

If you are uncertain of the requirements and how they might affect you, please refer to Bylaw 901 on our website. In addition, our website contains information on the specific exemptions that have been approved, what constitutes verifiable and unverifiable learning activities and assistance in assessing whether volunteer activities require ongoing CPD.

Seminar Leaders

The seminar leader for each course is listed in the course description. Full bios for each instructor are available on the Institute's website at icam.mb.ca > Professional Development > Seminar Leaders.

The CA Competency Map

The CA Competency Map provides a profile of the CA profession, not of the individual CA. It can, however, prove useful in shaping your own PD opportunities to meet your career goals.

Look for this symbol "❖" in the seminar descriptions to see the competency areas covered in that seminar.

- ❖ **Organizational Effectiveness, Control and Risk Management:** competencies related to the evaluation and development of an entity's ability to enhance its decision making and maximize its organizational performance, including its governance, structure, policies, systems and resources.
- ❖ **Finance:** competencies related to financial management, financial strategy and financial decision making and personal financial planning.
- ❖ **Taxation:** competencies related to taxation planning, compliance and reporting for various entities.
- ❖ **Assurance:** competencies related to statutory and regulatory audit/assurance requirements as well as broader validation and assurance services.
- ❖ **Performance Measurement:** competencies related to the evaluation, development and interpretation of an entity's financial and non-financial information that measures and enhances an entity's organizational performance.
- ❖ **Information Technology:** competencies related to the evaluation of an entity's information needs and the development and use of information technology in achieving its strategic and operational goals and objectives.
- ❖ **Professional Skills:** professional and personal competencies that will help you continue to enhance your professional effectiveness.

Registration Deadline

14 calendar days prior to the seminar date. If registration occurs after the deadline, an administration fee of \$50 per seminar will be assessed.

Course confirmations advising time and location will be sent by e-mail. Course offerings that do not meet minimum enrolment requirements by the deadline date will be cancelled.

Walk-ins are not permitted. Registrations are handled on a "first-come, first-served" basis.

Cancellations, Transfers & No-Shows

All cancellations and transfers must be received by mail, e-mail or fax.

Cancellations of registrations received at least 10 calendar days prior to the course date will result in a full refund / restoration of passport day.

Transfers between courses are accepted up to 10 calendar days prior to the course date.

Cancellation and transfer requests received less than 10 calendar days, but more than 2 business days prior to the course date will be subject to an administration fee of \$50 per seminar. Passport holders will have the portion of the PD Passport day used fully restored.

Registrants who do not attend and do not notify the Institute in writing at least 2 business days prior to the course date will not receive a refund or credit. For PD Passport holders, this will result in forfeiture of the entire portion of the PD Passport used to register for the seminar.

Replacement Attendees

Non-passport registrants who find it impossible to attend the seminar may send a replacement. The Institute should be advised of any changes prior to the seminar date.

Corporate Passport registrations are transferable to staff within the organization. The Institute should be advised of any changes prior to seminar date.

Passports

Passports are valid for the 2011-2012 Fall/Winter Program from April 1, 2011 to March 31, 2012. Passports may not be used until payment is received in full and may not be used retroactively for courses taken prior to its purchase or for courses beyond March 31, 2012. Any unused portions of the PD Passports cannot be refunded, credited or carried forward.

The Institute reserves the rights to the Passports. Inappropriate use of the PD Passports will result in the immediate cancellation of privileges with no refund.

Payment

Full payment must be submitted at the time of registration by any of the following methods:

- On-line when you register using Member Login.
- Cheque made payable to "The Institute of Chartered Accountants of Manitoba." Please note that post-dated cheques cannot be accepted. Any subsequent refunds will be made by cheque.
- Visa or MasterCard (see registration form). Any subsequent refunds will be made by credit to the account. If paying by credit card, the form can be faxed to (204) 943-7119.

Lunch

Lunch is included for all full-day seminars.

Fee Reduction or Waiver

Members who have been granted a fee reduction or waiver may be eligible to receive one day of Institute sponsored PD at no cost.

Accommodations

If you require accommodations, all CAs receive preferential rates at the Fairmont which is in close proximity to the Institute and the CA Learning Centre.

The Institute of Chartered Accountants of Manitoba
700 - One Lombard Place
Winnipeg, MB R3B 0X3
Tel: 204 942.8248 Toll free in MB: 1 888 942.8248
Fax: 204 943.7119 icam@icam.mb.ca www.icam.mb.ca

