PRINCE EDWARD ISLAND

Live Broadcast Webinars

Live broadcast courses are delivered live and can be accessed anywhere you have access to the internet.

Participants watch the course leader deliver the course, and have the PowerPoint presentation on their screen at all times.

A live chat option allows online participants to submit questions, so you will always feel like you are a part of the room.

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PDL01: Finance and Treasury for Accountants – The Business Side

Date:	11/8/2018	CPD Hours:	7 hours
Time:	9:30 am – 6:00 pm AST	Price:	$ 350.00

Course Description:

Finance and treasury is something most accountants have limited training on. However, they are often called upon for advice in these areas, particularly to hedge various risks. Even if they work with experts, it is important to understand some of the complexities to be more effective in their role. Most accountants are familiar with the basics, such as simple options, but are not aware of the complex strategies that could be implemented. Performing the accounting effectively requires a good understanding of the business behind financial instruments.

This course reviews the business side of finance, hedging, and treasury; it develops a solid understanding of some of the key principles behind complex transactions to obtain a better understanding of the business aspects.

Topics Include:

- Financial instruments and hedging - the business aspect
- Futures, forwards, swaps, and options
- Alternative hedging strategies
- Protective puts, covered calls, and collars
- Money spreads
- Swaps and Swaptions

Who Will Benefit:

This seminar is designed for professionals who would like to broaden their business knowledge of finance, financial instruments and hedging, particular the lesser known strategies and how they are practiced.

Course Leader:

Karine Benzacar

PDL02: De-Stress for Success

Date:	11/13/2018	CPD Hours:	3.5 hours
Time:	9:30 am - 1:30 pm AST	Price:	$ 200.00

Course Description:

In this workshop, designed specifically for accounting and finance professionals, we will explore root causes of stress and pressure that negatively impacts our professional and personal health.

The workshop will then provide you with established tools and techniques that can be implemented immediately to help address these stressors and improve your quality of life.

Topics Include:

- Identifying the root causes of stress for accounting and finance professionals
- Understanding the health consequences of “bad” stress over prolonged periods
- Applying the “De-stress for Success” toolkit
- Tailoring the “De-stress for Success” toolkit for your specific challenges

Who Will Benefit:

The course will benefit individuals looking for tools to manage stress and improve the quality of their professional and personal well-being.

Course Leader:

Garth Sheriff, CPA, CA, CIA

PDL03: Thinking Outside the Box

Date:	11/13/2018	CPD Hours:	3.5 hours
Time:	2:30 pm – 6:30 pm AST	Price:	$ 200.00

Course Description:

Innovation can lead to breakthrough ideas and operational excellence. However, 'outside the box' thinking is very challenging for most of us. This workshop will provide you with researched-based tools and techniques that can be implemented immediately to help encourage innovation individually and within your teams.

Topics Include:

- Understanding what thinking “outside the box” means
- Identifying roadblocks to thinking outside the box
- Applying a researched based framework - the thinking hats

Who Will Benefit:

Professionals looking to improve their ability to think differently and creatively when confronting challenging problems.

Course Leader:

Garth Sheriff, CPA, CA. CIA

PDL04:	Stocks, ETFs and Mutual Funds

Date:	11/14/2018	CPD Hours:	7 hours
Time:	9:30 am - 6:00pm AST	Price:	$ 350.00

Course Description:

Today in Canada, mutual funds are losing ground to investors who now prefer to hold individual stocks or exchange traded funds (ETFs) in their RRSP and investment portfolios. This seminar teaches a novice investor all about stocks, ETFs and mutual funds, the pros and cons of each type, tax characteristics, fee differences, various levels of risk, qualitative and quantitative aspects of these three core ways to invest.

The course is designed to help investors select products for their RRSPs, TFSAs and other investment portfolios, including corporate and trust accounts. In a jam-packed session, Kurt Rosentreter discusses portfolio construction techniques, what products work and which don't and finding personal success with investing.

Topics Include:

- How to select different types of stocks in which to invest, valuation metrics, different investment styles used by money managers, when to sell stocks and how to judge results
- What is a mutual fund, different types, fees, commissions paid to an advisor, risk levels, currencies, how to evaluate mutual funds, selecting different funds for a portfolio and more
- Definitions of stocks and ETFs, performance expectations, risk levels, tax efficiency, cost, how to build a portfolio and a comparison of each product to determine the best way to invest

Who Will Benefit:

Those seeking to understand investing successfully on their own or be better prepared to evaluate an investment portfolio. This course will not cover technical analysis, derivatives or day trading techniques and is not suited to advanced investors.

Course Leader:

Kurt Rosentreter, CPA, CA, CFP, CIMA, TEP, FCSI, CLU

PDL05: Essential Personal Insurance Strategies for a Lifetime

Date:	11/21/2018	CPD Hours:	3.5 hours
Time:	9:30 am - 1:30 pm AST	Price:	$ 200.00

Course Description:

Throughout your lifetime everyone owns life insurance, disability insurance, health insurance, critical illness insurance and travel insurance. But what are you really buying?

In a comprehensive learning course, national best-selling author and long-time CPA Ontario course instructor Kurt Rosentreter will teach you in the ins and outs of personal insurance products away from the sales tactics of an insurance agent. Nothing is more important than a safety net for your family if you die, are disabled, get sick or otherwise cannot provide for them – come and learn about the many insurance products in Canada and what is right for you, your partner, your kids, your business, your employees and your parents.

Topics Include:

- How much life insurance do you need, how does need change by stage of life, what type to buy, cost and understanding the many insurance companies in Canada
- All about disability insurance
- What is critical illness insurance
- The A-Zs about health insurance including an overview of essential tips on travel health insurance
- Tax planning strategies using insurance and corporations
- Life insurance to minimize income tax on death
- Life insurance as an investment – can it really beat your stocks and bonds?
- Second opinion on your employer provided insurance – why relying on your group plan is dangerous
- When do you have too much insurance
- How do insurance agents get paid?
- As an accountant in public practice, I can share in insurance agent commissions when I refer clients?

Who Will Benefit:

- Young professionals trying to assess their employer insurance coverage
- Parents wishing to learn about life insurance
- Executives with large incomes that need insurance beyond what an employer provides
- Business owners seeking to put insurance in place as part of a buy-sell business transition arrangement Professionals seeking to use insurance as a tax shelter
- Anyone wishing to learn about the features of personal insurance in general

Course Leader:

Kurt Rosentreter, CPA, CA, CFP, CIMA, TEP, FCSI, CLU

PDL06:	Better Understanding of Enterprise Risk Management

Date:	11/21/2018	CPD Hours:	3.5 hours
Time:	2:30 pm - 6:30pm AST	Price:	$ 200.00

Course Description:

In dealing with our increasingly complex and fast-moving world, Risk Management is truly becoming a key discipline to master. Today's successful organizations are the ones that are best able to understand risk, manage risk, and leverage risk as part of their competitive advantage.

This seminar is intended to provide participants with a review of base risk management fundamentals, and then introduce key risk management tools which includes time to practice applying those tools to their specific situations.

Topics Include:

- Revisiting the fundamentals of Enterprise Risk Management:
- Introducing key Risk Management tools and applying them to your organization
- Understanding how you can best communicate to, and advise on risk with Senior Management and the Board of Directors

Who Will Benefit:

CPAs who have a base knowledge of risk and risk management and are responsible, directly or indirectly, for organizations that have exposure to risk and have been tasked to better understand how to mitigate and manage potential problems. Public practitioners will be able to help their clients understand as well as manage risk in their businesses.

Course Leader:

William Wesioly, CPA, CMA

PDL07: Information, Insights and Influence – How Big Data is Defining the Future Executive

Date:	11/22/2018	CPD Hours:	7 hours
Time:	9:30 am – 6:00pm AST	Price:	$ 350.00

Course Description:

Today's executives are facing rapidly evolving challenges. Competition is fierce and customers are more demanding than ever, putting pressure on companies and their leadership.

Big data is changing every part of the organization – how we communicate, how we hire and how we serve the customer. What effect will this have on the leadership teams and the functions they manage in the future? What do executives need to know about big data analytics?

This class will examine how the explosion in big data is changing the role of the executive through a number of global studies. You will learn how to change, adapt, leverage, and implement big data in the executive role to make an impact through improved decisions.

Topics Include:

- How big data is changing the role and the skillset of the executive
- What are the Five Habits of Effective Data-Driven Organizations?
- How executives can create a data and analytics driven organization
- Using Business Intelligence and Performance Models to inform, insight, and influence
- What is the attraction of dashboards to executives?
- Exploration of the seven pillars of business analytics success
- How to align key business challenges across the organization
- Analytics implementation: what works and what doesn't
- The future of analytics

Who Will Benefit:

Business professionals in functional leadership roles who are responsible for managing teams, making operational decisions, or setting organizational strategy.

Course Leader:

David Elsner

PLD08: ASPE and ASNFPO – Update 2018

Date:	12/4/2018	CPD Hours:	3.5 hours
Time:	9:30 am - 1:30pm AST	Price:	$ 200.00

Course Description:

This seminar will provide an information update on recent revisions to the CPA Canada Handbook – Part II, Accounting Standards for Private Enterprises (ASPE) and revisions to CPA Canada Handbook – Part III, Accounting Standards for Not-for-Profit Organizations (ASNFPO). Participants will first be provided with an overview of changes to ASPE and ASNFPO, followed by specific examples of the implementation of new and revised recommendations. In addition, practical guidance will be provided on selected accounting matters identified by practice advisory and/or practice inspection.

Learning Objectives:

By the end of this course, participants will be able to:

- Explain how to apply specific high risk (more complex/imminent) ASPE proposed standards for Retractable or Mandatory Redeemable Shares in a Tax Planning Arrangement, Accounting for Related Party Financial Instruments and Agriculture
- Identify changes and improvements in relation to "hot topics" (practice inspection/practice advisory)
- Explain how to apply ASNFPO proposed accounting standard improvements
- Summarize future developments in ASPE and ASNFPO

Topics Include:

ASPE

- Exposure Drafts
- Retractable or Mandatorily Redeemable Shares Issued in a Tax Planning Arrangement
- Accounting for Related Party Financial Instruments and Significant Risk Disclosures
- Agriculture Project
- Consultation on Priorities for Part II
- Narrow Scope Amendment Financial Instruments
- Matters Private Advisory Committee
- Practice Inspection topics

NFPO

- Accounting Standard Improvements to NFPOs
- Projects
- Contributions Revenue Recognition
- Reporting Controlled and Related Entities
- Matters NFPO Committee

Who Will Benefit:

This seminar provides an overview of the current developments in ASPE and ASNFPO. It is best suited to professional accountants involved with small and medium-sized businesses.

Course Leader:

Shari Mann, CPA, CA

PDL09: Assurance Standards – Update 2018: Auditors

Date:	12/4/2018	CPD Hours:	2 hours
Time:	2:00 pm - 4:00pm AST	Price:	$ 100.00

Course Description:

This seminar is designed to review recent revisions to the CPA Canada Handbook – Assurance and other practice matters specifically for auditors and only auditors.

The focus of the seminar is on new auditing standards issued, with an overview of projects in progress, and other issues such as auditing accounting estimates and other developments of interest to auditors.

Audit practice issues identified by practice advisory and/or practice inspection will also be reviewed.

Course Leader:

Shari Mann, CPA, CA

PDL10: Assurance Standards – Update 2018: Non-Auditors

Date:	12/4/2018	CPD Hours:	2 hours
Time:	4:30 pm – 6:30 pm AST	Price:	$ 100.00

Course Description:

This seminar is designed to review recent revisions to the CPA Canada Handbook – Assurance and other practice matters for practitioners who do not do audits.

The focus of the seminar is on new developments for review engagements and compilations, with an overview of projects in progress. Related practice issues identified by practice advisory and/or practice inspection will also be reviewed, particularly with respect to the application and reporting under CSRE 2400 Review Engagements.

Course Leader:

Shari Mann, CPA, CA

PDL11: Bridging the Generational Gap

Date:	12/5/2018	CPD Hours:	3.5 hours
Time:	9:30 am – 1:15pm AST	Price:	$ 200.00

Course Description:

In this workshop, designed specifically for accounting and finance professionals, we will explore the perceptions of the generational differences that exist among teams.

We use current research to identify the potential areas of misconceptions between generations and implement tools to increase understanding and communication across our diverse generational team members.

Topics Include:

- Defining the different generational categories within the workplace
- Understanding the major events and influences for each generation
- Understanding common misconceptions of different generations
- Using current research models to identify the root causes of conflicts within a generationally diverse team or organization
- Applying specific tools to increase our understanding and communication across our diverse generational team members

Who Will Benefit:

Professionals who are looking to improve their communication within a generationally diverse team or organization.

Course Leader:

Garth Sheriff, CPA, CA, CIA

PDL12: Designing and Delivering Effective Presentations

Date:	12/5/2018	CPD Hours:	3.5 hours
Time:	2:30 pm - 6:30 pm AST	Price:	$ 200.00

Course Description:

In this engaging program, we will provide researched-based tools to help effectively design and deliver your business presentations. The first half of the program will introduce the latest in instructional design research to ensure your content and visual aids are helping your presentation delivery. The second half of the program will provide SMART (specific, measurable, attainable, realistic and timely) tips and tools to improve your presentation delivery.

Topics Include:

Design

- The latest research in adult pedagogy
- Technology, modality and content design
- The story arc method of content design

Delivery

- A method for the self-assessment of your presentation delivery strengths and development areas
- The latest research in delivery techniques that improve the effectiveness of a presentation
- Practical exercises to improve your presentation delivery including voice, posture and gestures

Who Will Benefit:

Professionals looking to improve the effectiveness of their business presentations both in delivery and content design.

Course Leader:

Garth Sheriff, CPA, CA, CIA

PDL13: Management Accounting - Foundations

Date:	12/6/2018	CPD Hours:	7 hours
Time:	9:30 am - 6:00pm AST	Price:	$ 350.00

Course Description:

For professional accountants that have not exercised those management accounting muscles in some time (maybe since university), this course will help participants apply management accounting concepts to generate new ideas for problem solving. Common associations with management accounting include cost accounting, break even analysis and variance analysis. However, management accounting concepts include so much more such as organizational behavior and employee motivation. It is exciting to learn that the world of management accounting includes, for example, research on workplace altruism by renowned Wharton School Professor Adam Grant. And at the center of all these concepts in management accounting is their application to creative problem solving.

In gaining movement back in those management accounting muscles by taking this course, participants will be able to generate more ideas on how to solve problems such as:

- How to identify and classify costs for internal decision making
- How to use cost behavior to help with budgeting and forecasting
- How to more effectively communicate with non-financial managers (such as Sales, HR)
- How to create incentives to align organizational strategy and employee motivations

Participants will work through problems, case studies and collaborate with their peers to discuss how they can use management accounting information and tools to help solve challenges within their organizations.

Learning Outcomes:

By the end of this course, participants will be able to:

- Recall management accounting topics and terminology
- Classify different organizational costs by cost behaviour and cost function
- Arrange and evaluate cost volume profit (CVP) and relevant costing problems
- Design approaches to relevant costing problems that align with the knowledge of key users
- Identify different types of performance measurement and budgeting tools
- Evaluate organizational strategy and key performance indicators (KPIs)
- Interpret management accounting decisions for non-financial managers
- Identify key trends in management accounting

Topics Include:

- Welcome and Introduction
- Decision Making and Costing
- Cost Volume Profit Analysis
- Relevant Costing
- Performance Measurement and Budgeting
- Communicating with Non-Financial Managers
- Trends in Management Accounting and Conclusion

Who Will Benefit:

This course is targeted to professional accountants who are transitioning into a managerial accounting role (or responsibilities) and require a refresher of key concepts. The course has been designed to provide an overview of selected key topics in management accounting.

Course Leader:

Garth Sheriff, CPA, CA, CIA

PDL14: GST/HST – Specific Topics

Date:	12/10/2018	CPD Hours:	7 hours
Time:	9:30am – 6:00 pm AST	Price:	$ 350.00

Course Description:

Failure to be aware of the complexities of the GST and HST can result in lost opportunities, or worse, large tax assessments. GST/HST - Fundamentals introduced the basic rules regarding how the GST essentially works by discussing the GST and HST place-of-supply rules and the general recovery rules. This course presents even more GST/HST topics to enhance your knowledge about Canada's value-added-tax.

Further concepts related to the application and the recovery of GST/HST will be discussed. More collection issues will be presented including early payment discounts and the treatment of bad debts. There will be an overview of the definition of "consideration" and the importance of proper characterization and identification of taxable supplies. A review of input tax credit entitlement issues will focus on common recovery issues encountered by registrants including reimbursements. As well, additional cross border issues will be presented including the new drop-shipment rules. Plus, an overview of some hot topics related to real property, sale of a business and the health care industry will also be presented.

Learning Objectives:

This course builds on the knowledge participants received during the GST/HST - Fundamentals, Canada's Federal Sales Tax course. It provides participants with an overview of important GST/HST issues and identifies some important areas which are frequent sources of errors/assessments. Participants will be exposed to more GST and HST topics and issues accompanied by relevant everyday examples. At the end of the day, attendees will have been exposed to an abundant of GST/HST issues. This information will be extremely useful to CPAs and students and for those who work with sales taxes on a daily basis will be able to reaffirm their knowledge with this sales tax review and receive an update on what is new and what issues are trending.

Topics Include:

- Introduction
- Review of important concepts
- Collection issues
- Common recovery issues
- Cross border issues
- Other issues
- Audits, assessments and director liability

Who Will Benefit:

CPAs and students, from practitioners to accountants in business or industry and other advisors who want to obtain a greater understanding of our value-added-sales tax system in Canada. It will be beneficial to those who deal with the Goods and Services Tax (GST) and Harmonized Sales Tax (HST) on a daily basis who would like a refresher on the current legislation and an update of trending issues.

Course Leader:

Diane Gaudon, FCPA, FCGA

PDL15: NFPO and Registered Charities – Accounting and Taxation

Date:	12/11/2018	CPD Hours:	7 hours
Time:	9:30 am – 6:00 pm AST	Price:	$ 350.00

Course Description:

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

Topics Include:

- Canadian GAAP for not-for-profit financial statements
- Tax compliance requirements for charities and not-for-profits
- Canadian tax rules with respect to loss of tax exempt status and planning techniques to minimize this risk
- The latest proposed and enacted tax legislation affecting these entities

Who Will Benefit:

Members in the NFPO and/or charities sectors and practitioners who audit or provide advice to registered charities or NFPO entities. Any level of public practice, practitioner, board member new to NFPO/Charities or requiring refresher.

Course Leader:

Julian Hawkins, CPA, CA

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☐	13-Nov	PDL02	De-Stress for Success	200.00	
☐	13-Nov	PDL03	Thinking Outside the Box	200.00	
☐	14-Nov	PDL04	Stocks, ETFs and Mutual Funds	350.00	
☐	21-Nov	PDL05	Essential Personal Insurance Strategies for a Lifetime	200.00	
☐	21-Nov	PDL06	Better Understanding of Enterprise Risk Management	200.00	
☐	22-Nov	PDL07	Information, Insights and Influence – How Big Data is Defining the Future Executive	350.00	
☐	4-Dec	PDL08	ASPE and ASNFPO – Update 2018	200.00	
☐	4-Dec	PDL09	Assurance Standards – Update 2018: Auditors	100.00	
☐	4-Dec	PDL10	Assurance Standards – Update 2018: Non-Auditors	100.00	
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☐	6-Dec	PDL13	Management Accounting - Foundations	350.00	
☐	10-Dec	PDL14	GST/HST – Specific Topics	350.00	
☐	11-Dec	PDL15	NFPO and Registered Charities – Accounting and Taxation	350.00	
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