CHARTERED PROFESSIONAL ACCOUNTANTS
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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Note:

Information on February sessions will be added and advertised when it becomes available.

PDL01: Income Tax Update 2018

Date:	18 January 2019	CPD Hours:	7 hours
Time:	9:30 am – 6:00 pm AST	Price:	$ 375.00

Course Description:

Providing a detailed summary of tax law changes in the past year, this seminar examines current changes and relevant issues in taxation that affect individuals and most businesses in the private sector. Learn how the current levels of personal and corporate tax rates affect and possibly change accepted tax planning techniques. A review of the current integration of personal and corporate tax rates is provided. The proposals from the Federal Budget, as well as other sources of information from the Department of Finance and the Canada Revenue Agency (CRA), including news releases, draft legislation, CRA technical interpretations and tax cases, are discussed together with other particular subjects of current relevance and interest. Course coverage will be largely restricted to changes in the last year.

Learning Objectives:

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

- Provide relevant, current tax advice to clients
- Prepare personal and corporate tax returns with knowledge of recent developments
- Complete tax planning arrangements/positions taking into account current issues
- Be confident that they are "up-to-date" with their tax knowledge

Topics Include:

- Tax rate changes/integration
- New rules dealing with the taxation of private companies, passive investment income, dividend sprinkling, small business deduction, etc.
- Federal Budget (2018)
- Taxation of employment income/benefits
- Business income/deductions
- Capital transactions and shareholder issues
- Partnerships/Trusts/Charities and NPOs/Deferred Income Plans
- International issues
- CRA Administrative matters
- Provincial/Territorial update

Who Will Benefit:

This seminar will be beneficial to those who need current information to advise clients, deal with the CRA, and who want to update their existing knowledge of income tax issues to incorporate developments in the past year. As the course focuses only on recent developments, it is best suited for members who take the course annually.

Course Leader: Alex Garber

PDL02: How to Build an Investment Portfolio

Date:	26 March 2019	CPD Hours:	7 hours
Time:	9:30 am – 6:00 pm AST	Price:	$ 375.00

Course Description:

So many mutual funds, stocks, GICs, bonds and ETFs. What is the best selection for an RRSP? A child's RESP? A TFSA? Should an investment adviser, portfolio manager or investment counsellor be hired to help you manage money or just a do-it-yourself approach? How is an investment portfolio constructed? How are the assets held evaluated? Are expected returns being achieved?

Kurt Rosentreter, one of Canada's pre-eminent experts on wealth management and a national best-selling wealth management author, will lead you through a fast-paced session with informative and direct commentary on today's investment landscape in Canada. This seminar is one of Kurt's most popular and well-attended courses, and is not to be missed if you have an eye on investments.

Topics Include:

- A six-step process to build and maintain a logical, cost effective, risk managed and tax smart investment portfolio
- All about investment fees – commissions, loads, asset-based fees – which are best and which to avoid
- Pros and cons of mutual funds, GICs, stocks, bonds, wrap programs, ETFs, segregated funds, linked notes and all the products you see in the marketplace today
- Specialized investment strategies for kids, seniors, corporations, trusts and not-for-profits
- Designing ideal reporting with rate-of-return and benchmarks to allow you to properly judge results
- Explanations of how the financial services industry works in Canada, different types of registrations for advisors, insurance, how your money is protected, the structure of adviser practices and more

Who Will Benefit:

Anyone looking for better results in portfolios, or a second opinion on what the current adviser is doing, including CFOs, board members or fiduciaries who oversee money. This course is not suited to advanced investors.

Course Leader: Kurt Rosentreter, CPA, CA, CFP, CIMA, TEP, FCSI, CLU

PDL03: Costing and Profitability Analysis

Date:	29 March 2019	CPD Hours:	7 hours
Time:	9:30 am - 6:30 pm AST	Price:	$375.00

Course Description:

The key to improving profitability or to turning an unprofitable situation into a profitable one is to understand the drivers of profitability and how to leverage on those core products or customers. Too often financial professionals are so occupied with the daily realities of reporting results that they don’t take the time to analyze and improve them.

In this seminar, participants will learn how to contribute directly to their organization’s bottom line by analyzing profitability by product, customer, segment, or geographical region. They will learn how to identify the main drivers of profitability and the parts of the business that needs to be changed. Professionals who contribute directly to an organization’s bottom line will expand their career opportunities and growth.

Topics Include:

- Sources of profitability
- The four cost components
- Overhead rates
- Activity-based costing (ABC) and operating leverage
- Performance indicators and profitability reporting

Who Will Benefit:

Business managers, financial analysts and decision makers who need a clear understanding of costs and profit that their products and services generate.

Course Leader: Karine Benzacar