CHARTERED PROFESSIONAL ACCOUNTANTS CANADA
COMPTABLES PROFESSIONNELS AGRÉÉS CANADA

Professional Development Catalogue

2020
—
2021

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Industry

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PROFESSIONAL DEVELOPMENT CATALOGUE - FOR INDUSTRY

PROFESSIONAL DEVELOPMENT CATALOGUE - FOR INDUSTRY

Audit

+ Bringing Artificial Intelligence to Financial Audit

Improved computing power and big data are changing the realities of how organizations adopt artificial intelligence (AI) and machine learning.

But did you know that AI can improve efficiency and effectiveness in the audit process? In this free webinar, you will learn about how AI can be harnessed to transform the internal and external audit space.

ON DEMAND
1 HOUR
FREE
WEBINAR

+ The Inventory Count Process for Auditors

If inventory is material to financial statements, then auditors are required to attend a physical count. When executed poorly, this can cause frustrations for both auditor and client, leading to inefficiencies.

Using short case studies, you will learn how to address common issues during the inventory count process. This virtual classroom will also show you how your team can integrate best practices during each stage of the process.

ON DEMAND
2 HOURS
FREE
ONLINE COURSE

+ Audit Data Analytics Guide

Harness the power of new technologies and data analytics to support the audit of financial statements for your clients or organization.

DIGITAL
PRINT
MEMBER: $115+
NON-MEMBER: $120+

+ Bank Confirmation Forms

Streamline how you prepare client materials. Use this set of helpful templates to prepare confirmation documents easily and efficiently.

Available in French.

DIGITAL
MEMBER: $25
NON-MEMBER: $30

+ Canadian Financial Reporting Collection

Your comprehensive library of the *CPA Canada Handbook* as well as financial reporting resources, including the *CPA Canada Standards and Guidance Collection* and the *Guide to International Financial Reporting Standards in Canada.*

DIGITAL
MEMBER: $585
NON-MEMBER: $640

+ Canadian Securities Reporting Advisor

A practical reference service to help you meet securities reporting and disclosure obligations for public companies. It includes coverage of Canadian securities legislation, commentary from CPA Canada and EY, compliance tools and more.

DIGITAL
$1650+

+ The CAS Proficiency Series

Jointly Presented with Grant Thornton International Ltd.

This online course series provides an easy, effective and interactive approach for you to understand and apply Canadian Auditing Standards (CAS) in your audit engagements.

Each program in this series uses design elements to encourage full comprehension and retention of the core concepts including:

a) CAS in the context of the stage of an audit
b) real-world scenarios and examples that are relevant to typical audits
c) frequent review questions (knowledge checks) and remedial feedback
d) a final assessment to determine mastery of the information

There are currently 23 programs in the series, with additional programs forthcoming that will cover the entire set of Canadian Auditing Standards.

ON DEMAND
2 HOURS
FREE
ONLINE COURSE

+ CPA Canada Handbook — Accounting

Make sure you know how to prepare financial statements in accordance with Canadian GAAP. This handbook includes the latest guidance on IFRS, ASPE, ASNPO and accounting standards for pension plans.

Available in French.

DIGITAL
PRINT
$300+

+ CPA Canada Handbook — Accounting and Assurance

This handbook will help you apply best practices from the Accounting Standards Board and the Auditing and Assurance Standards Board for IFRS, ASPE, CAS, CSQC 1 and quality control for firms that perform audits and reviews of financial statements, as well as other assurance engagements.

Available in French.

DIGITAL
$565+

+ CPA Canada Handbook — Assurance

The handbook reflects the Auditing and Assurance Standards Board's adoption of ISA and CAS, with information to help you apply the same rules as the *CPA Canada Handbook – Accounting and Assurance*, plus other Canadian standards and related services guidelines.

Available in French.

PRINT

$270

+ CPA Canada Standards and Guidance Collection

This thorough resource provides you with up-to-date information on accounting and assurance standards, the implementation of IFRS, ASPE, CAS and more.

Available in French.

DIGITAL

PRINT

MEMBER: $195+
NON-MEMBER: $675

+ In-Depth Brokers and Investment Dealers

The Canadian securities industry can be challenging. Equip yourself with the right knowledge and skills to navigate the important issues while providing accounting services for brokers and investment dealers.

In this comprehensive course, you will learn about the investment industry and its regulatory environment, as well as best practices in risk management, finan-cial reporting and auditing to support your clients in securities.

Note: A prerequisite module is required to ensure that you have a solid background on the business activities of the securities industry. It is included in the purchase of this course.

OCT. 26–27, 2020
TORONTO, ON

14 HOURS

$1950

VIRTUAL COURSE

+ Professional Skepticism: The Golden Key to an Auditor's Success

In this online course, you will review over theoretical concepts and hear from fellow CPAs who provide real-life perspectives that explore the concept of professional skepticism. You will also be able to go through interactive case studies that allows participants to apply professional skepticism in a fictional setting using a "choose-your-own-adventure" format.

ON DEMAND

5 CPD HOURS

MEMBER: $349
NON-MEMBER: $385

ONLINE COURSE

Prices subject to change

+ REALPAC ASPE Handbook

Real estate accounting can be complex. This is your one-stop source for the most up-to-date recommended accounting practices for real estate investment and development entities reporting under ASPE.

DIGITAL

MEMBER: $425
NON-MEMBER: $470

+ REALPAC IFRS Handbook

What you need to navigate the ins and outs of global real estate reporting with confidence. This in-depth guide covers the top recommended accounting practices for real estate investment and development entities when applying IFRS.

DIGITAL

MEMBER: $425
NON-MEMBER: $470

Prices subject to change

Corporate Governance

+ 20 Questions Directors Should Ask About Building and Sustaining a Board

If you want a high-performing board, the quality and experience of individuals who serve – and the way they work together – is paramount. This publication will guide you through the various stages of board evolution, from creation to renewal.

Available in French.

PRINT

MEMBER: $20
NON-MEMBER: $25

+ 20 Questions Directors Should Ask About Directors' and Officers' Indemnification and Insurance

Developed to help directors and officers assess the effectiveness of corporate indemnification and director and officer insurance programs, this book will help you navigate the critical elements of building a successful protection program.

Available in French.

PRINT

MEMBER: $20
NON-MEMBER: $25

+ 20 Questions Directors Should Ask About Internal Audit

The complexity of audit continues to grow as businesses face new cybersecurity risks, increased regulation and other factors like economic uncertainty. Help your organization weather the evolving impact of changes in governance, risk, compliance and future value.

Available in French.

PRINT

MEMBER: $20
NON-MEMBER: $25

+ A Framework for Board Oversight for Enterprise Risk

Does your company's board know its role in mitigating risk? Tap into valuable guidance and that will help you and your directors better identify critical risks and recognize the potential compounding effects of risk during a crisis.

PRINT

MEMBER: $30
NON-MEMBER: $40

+ Director's Briefing: Board Oversight of Tax Risk

Risks can arise as a result of both ongoing tax planning processes and extraordinary transactions. This book will help you execute your oversight responsibilities with confidence by addressing the role of boards versus audit committees in managing tax risk.

Available in French.

PRINT

MEMBER: $20
NON-MEMBER: $25

+ Guidance for Directors: Disclosure and Certification — What's at Stake?

As a director, you face a higher risk of liability under securities class action if you misrepresent company statements or fail to make timely disclosures. This useful book sets out the key elements of a certification support process to help you ensure reliability and reduce risk.

Available in French.

PRINT

MEMBER: $20
NON-MEMBER: $25

+ IFRS — A Briefing for Chief Executives, Audit Committees and Boards of Directors

Briefing notes for CEOs, audit committee members, boards of directors and others who need a broad overview of IFRS. This collection includes easy-to-use summaries in non-technical language of IFRS requirements for annual reporting.

PRINT

MEMBER: $75
NON-MEMBER: $90

+ Overseeing Mergers and Acquisitions: A Framework for Boards of Directors

A robust framework to help you oversee successful mergers and acquisitions while maximizing shareholder value. Explore the full life cycle of M&A work, from strategy and transaction develop to implementation and post-closing activities.

Available in French.

PRINT

MEMBER: $35
NON-MEMBER: $45

Prices subject to change

Prices subject to change

+ Overseeing Strategy: A Framework for Boards of Directors

Many boards find the effective overseeing of strategy a challenging task. This practical framework can help you learn how to more effectively oversee the strategic planning process – from preparation and strategy formulation to execution and monitoring results.

Available in French.

PRINT

MEMBER: $35
NON-MEMBER: $45

+ Risk Oversight and Governance Collection

An ongoing series of concise publications that can help board leaders deal with the most relevant governance issues facing modern organizations. Learn how to ask tough questions, recognize common problems and implement best practices for your industry.

Available in French.

DIGITAL

MEMBER: $225
NON-MEMBER: $235

+ Small Company Boards: Questions for Potential Advisors and Directors

When you join the board of a small company, you have to implement good governance practices. This guide will help you fulfill your responsibilities by providing insights on the different roles of advisory and fiduciary boards, as well as what skills you need to excel.

Available in French.

PRINT

MEMBER: $20
NON-MEMBER: $25

Prices subject to change

Credentials

+ Certified in Financial Forensics (CFF)

JOINTLY PRESENTED BY AICPA

Take your CPA to the next level and deepen your expertise. When you earn the CFF, you join an exclusive community of professionals in forensic accounting with considerable knowledge, skills and experience.

Earning the CFF can help you stand out from the pack in this demanding field, distinguishing your expertise for clients and employers while also providing access to valuable tools and resources in forensic and valuation so you can keep growing your career.

ROLLING

VARIABLE

$400 – $500

ONLINE AND/OR IN-PERSON

+ Certified Information Technology Professional (CITP)

JOINTLY PRESENTED BY AICPA

Enhance your career with a specialty credential. When you earn the CITP, you'll join an esteemed network of like-minded professionals from across North America and receive access to exceptional tools and professional resources.

Becoming a CITP offers a career boost by validating your strategic skills in financial information management. It also identifies you as a trustworthy IT audit and assurance expert and could help you land new referrals in a competitive marketplace.

ROLLING

VARIABLE

$400 – $500

ONLINE AND/OR IN-PERSON

Get more from your PD

CPA Canada has a biweekly roundup of professional development resources, offerings and news delivered straight to your inbox. Visit cpacanada.ca/MyAccount to update your preferences.

Prices subject to change

Conferences

+ AICPA Forensic and Valuation Services Conference

CERTIFIED IN FINANCIAL FORENSICS (CFF)

JOINTLY PRESENTED BY AICPA

Get timely updates, cutting-edge information on new technology, and quality networking with other forensic accounting and valuation professionals. Put your finger on the pulse of change and optimize your strategy.

NOV. 9–11, 2020
UP TO 21 HOURS
STARTING AT $1295 USD
VIRTUAL CONFERENCE

+ The ONE National Conference

The ONE is an unforgettable experience that's all about cutting-edge content: engaging sessions, inspiring expertise, great technical workshops and unparalleled networking opportunities with over 1,000 CPAs from across Canada.

You will also be able to select the package that best suits you. Come find out what the future holds for the profession – including how to embrace innovation and keep up with the pace of change, no matter what industry you're in.

NOV. 9–11, 2020
4–43 HOURS
STARTING AT $99
VIRTUAL CONFERENCE

cpacanada.ca/TheONE

+ Commodity Tax Symposium

Stay up to date on critical issues in policy, legislation and compliance at Canada's largest and longest-running indirect tax event.

The agenda includes great networking opportunities and a variety of in-depth technical sessions, so you can refine your skills and make the most of your time — as well as expert-led panels that focus on practical issue identification and topic analysis.

CANCELLED FOR 2020
TBD
TBD
IN-PERSON OR VIRTUAL CONFERENCE

+ Scientific Development and Experimental Development Symposium

Take advantage of the latest tax insights on SR&ED in Canada. This comprehensive one-day event features hands-on learning and discussion, including interactive case studies. You will learn how to effectively resolve disputes, accelerate through the SR&ED cycle and file more successful claims.

You'll also have a front-row seat to explore new program updates and opportunities with Canada's top SR&ED experts – a mix of experienced industry practitioners and senior representatives from the CRA.

CANCELLED FOR 2020
TBD
TBD
IN-PERSON OR VIRTUAL CONFERENCE

Prices subject to change

+ Not-for-Profit Conference

Get the inspiration and practical support you need to be resilient in the midst of change and a complex operating environment. This year, the Not-for-Profit Forum is going fully virtual using an exciting, interactive 3D virtual platform.

Build new skills with deeper insights on innovation, funding and lessons learned from the pandemic through a series of interactive sessions, panels and Q&As. Plus, explore the latest issues in policy, leadership and how to reimagine the not-for-profit ecosystem for the future from Canada's top experts in the field.

Tune in from anywhere across the country and network between talks with other NFP professionals – all at an affordable price point with plenty of options to customize your package, including one-day or two-day options, workshops and an all-access pass.

FEB. 9–10, 2021 VANCOUVER, BC
UP TO 19 HOURS
STARTING AT $199
VIRTUAL CONFERENCE

cpacanada.ca/NFPForum

+ Oil and Gas Conference

Canada needs an agile energy sector – one that can confidently keep pace with the evolving business landscape. Explore critical issues and solutions facing our evolving Canadian oil and gas sector at this annual event for CPAs.

You'll have the opportunity develop new technical skills, connect with experts in oil and gas finance from across the country and get fresh insights on hot industry topics, including how to improve operations and support business diversification.

NOV. 19–20, 2020
7+ HOURS
STARTING AT $249
VIRTUAL CONFERENCE

cpacanada.ca/OilGas

+ Conference for Audit Committees

Business environments with constant disruption require skilled and diverse audit committee members. Strengthen your foresight on what's driving change globally as you learn how being on a board can make a difference.

Whether you're a seasoned committee member or looking to become a corporate director, this conference will help you navigate the latest guidance on key skills, evolving responsibility areas and risk management.

DEC. 8–9, 2020
13 HOURS
STARTING AT $595
VIRTUAL CONFERENCE

cpacanada.ca/AuditCommittees

Prices subject to change

Ethics

+ Applied Ethics in a Professional Setting

Many individuals, corporations and other entities believe that by following the rules, they are adhering to sound ethical principles – but this isn't always the case.

Go beyond the letter of the law. In this course, you'll explore a range of ethical concepts and case studies that grapple with important theoretical ethical dilemmas and consider the most effective way to handle those situations in practice.

ON DEMAND
4 HOURS
MEMBER: $189
NON-MEMBER: $239
ONLINE COURSE

+ Corporate Social Responsibility and Ethics

Discover what defines the CSR landscape today, including what it means to be good corporate citizen and the role that ethics play in business matters across different industries.

In this course, you'll learn how to help your organization enhance accountability, consider the implications of environmental accounting and reporting, and apply other best practices in corporate governance.

ON DEMAND
4 HOURS
MEMBER: $189
NON-MEMBER: $239
ONLINE COURSE

+ Success Podcast Series — Ethics and Governance

Ethics is at the core of every CPA's professional reputation. In this special six-part podcast series, you will explore a wide range of ethical and governance issues impacting CPAs across all sectors.

ON DEMAND
2 HOURS
MEMBER: $99
NON-MEMBER: $120
PODCAST

+ Essence of Professionalism: Ethics, Rules and Standards

Adhering to a code of ethics is an important part of being a professional accountant. In this course, you will explore how ethical codes and responsibilities should be applied in your day-to-day professional activities as a CPA using practical exercises.

It also covers the tools you need to help resolve challenges in decision making and navigate public concerns about ethics in the profession.

ON DEMAND
2 HOURS
MEMBER: $249
NON-MEMBER: $299
ONLINE COURSE

+ Ethical Principles and the Accounting Profession: Code Decoded

Created to complement your real-life experiences, this course will help you improve your ability to deal with ethical situations at every stage of your career. Work through a variety of case studies and interactive exercises, then see how your answers stack up against guidance from the experts.

ON DEMAND
4 HOURS
MEMBER: $189
NON-MEMBER: $239
ONLINE COURSE

+ Ethics and Tax

An overview of ethics in the tax profession. Learn how to apply key concepts in ethics to the issues you face every day in your tax practice and hear from a wide range of tax practitioners about their experiences with ethics in tax.

You'll get an overview of ethics in the profession, including why it's essential to a successful tax practice, and review best practice models for ethical decision making.

ON DEMAND
4 HOURS
MEMBER: $289
NON-MEMBER: $335
ONLINE COURSE

+ Ethics for the CFO

For many executives, ethical decisions can be challenging. In this course, you'll engage with hands-on case studies, theory and discuss real-life events to build ethical skills with C-suite leadership in mind.

You'll also learn why it's important for CFOs to embrace ethics in choices that have repercussions not only for yourself, but for your organizations and the public as well.

ON DEMAND
4 HOURS
$229
ONLINE COURSE

+ Ethics for the Consultant

As a consultant, ethics are central to the value of your services. Make sure you have the right skills to offer sound judgment to clients and navigate potential roadblocks.

Through a blend of theory, practice and case studies based on real-life events, you'll learn how to address the most common challenges – from business deals and tax issues to performance management and professional standards.

ON DEMAND
4 HOURS
MEMBER: $255
NON-MEMBER: $310
ONLINE COURSE

+ **Success Podcast Series — Upholding Professional Integrity**

Integrity is the core of the CPA profession. In this podcast series, explore the current trends around financial crimes and corporate misconduct, how to be prepared for them, and how to help jeopardized businesses recover.

ON DEMAND
1 HOURS
MEMBER: $49
NON-MEMBER: $59
PODCAST

Financial Reporting

+ **In-Depth Brokers and Investment Dealers**

The Canadian securities industry can be challenging. Equip yourself with the right knowledge and skills to navigate the important issues while providing accounting services for brokers and investment dealers.

In this comprehensive course, you will learn about the investment industry and its regulatory environment, as well as best practices in risk management, finan-cial reporting and auditing to support your clients in securities.

Note: A prerequisite module is required to ensure that you have a solid background on the business activities of the securities industry. It is included in the purchase of this course.

OCT. 26–27. 2020
TORONTO, ON
14 HOURS
$1950
VIRTUAL COURSE

+ **Business Valuation**

An in-depth explanation for you of the key principles, methodologies and approaches used in business valuation today, such as valuation assignments, income tax considerations, balance sheet adjustments and intangible assets.

DIGITAL
PRINT
MEMBER: $89+
NON-MEMBER: $100

+ **Canadian Corporate Finance Manual**

From practitioners who require a day-to-day reference source to CFOs who need a deeper understanding of the marketplace – this manual will sharpen your skills in corporate finance with real-world case studies, techniques and tips.

DIGITAL
MEMBER: $225
NON-MEMBER: $235

+ **Canadian Financial Reporting Collection**

Your comprehensive library of the *CPA Canada Handbook* as well as financial reporting resources, including the *CPA Canada Standards and Guidance Collection* and the *Guide to International Financial Reporting Standards in Canada*.

DIGITAL
MEMBER: $585
NON-MEMBER: $640

+ **Canadian Securities Reporting Advisor**

A practical reference service to help you meet securities reporting and disclosure obligations for public companies. It includes coverage of Canadian securities legislation, commentary from CPA Canada and EY, compliance tools and more.

DIGITAL
$1650+

+ CPA Canada Guide: Reporting on an Entity's Cybersecurity Risk Management Program and Controls

Learn how to protect your organization from digital threats using the System and Organization Controls (SOC) guide for cybersecurity assurance engagement, which has been adapted by CPA Canada from the AICPA version to meet Canadian standards.

DIGITAL

MEMBER: $69
NON-MEMBER: $89

+ CPA Canada Handbook — Accounting

Make sure you know how to prepare financial statements in accordance with Canadian GAAP. This handbook includes the latest guidance on IFRS, ASPE, ASNPO and accounting standards for pension plans.

Available in French.

DIGITAL PRINT

$300+

+ CPA Canada Handbook — Accounting and Assurance

This handbook will help you apply best practices from the Accounting Standards Board and the Auditing and Assurance Standards Board for IFRS, ASPE, CAS, CSQC 1 and quality control for firms that perform audits and reviews of financial statements, as well as other assurance engagements.

Available in French.

DIGITAL

$565

+ CPA Canada Standards and Guidance Collection

This thorough resource provides you with up-to-date information on accounting and assurance standards, the implementation of IFRS, ASPE, CAS and more.

Available in French.

DIGITAL PRINT

MEMBER: $195+
NON-MEMBER: $675

Prices subject to change

+ Guide to Accounting Standards for Private Enterprises

Improve your knowledge and understanding of Part II in the *CPA Canada Handbook – Accounting* This useful guide supports the application of ASPE in Canada.

Available in French.

DIGITAL

MEMBER: $415
NON-MEMBER: $605

+ IFRS — A Briefing for Chief Executives, Audit Committees and Boards of Directors

Briefing notes for CEOs, audit committee members, boards of directors and others who need a broad overview of IFRS. This collection includes easy-to-use summaries in non-technical language of IFRS requirements for annual reporting.

PRINT

MEMBER: $75
NON-MEMBER: $90

+ International Financial Reporting Standards

A searchable collection for you that covers the complete set of IFRS from 2017 to present. It also includes accompanying documents, such as implementation guidance, illustrative examples, draft interpretations and monthly updates when revisions or amendments arise.

DIGITAL

MEMBER: $410
NON-MEMBER: $450

+ Model Financial Statements for IFRS

Make sure you have the right resources to prepare consistent financial statements that reflect professional standards. This publication address four models applying IFRS as well as appropriate references to Part I of the *CPA Canada Handbook – Accounting*.

DIGITAL PRINT

MEMBER: $260
NON-MEMBER: $270

+ Model Financial Statements for Private Enterprises

If you prepare financial statements for private enterprises, then this is the resource for you. It covers ASPE in Part II of the *CPA Canada Handbook – Accounting* with analysis, application insights, key presentation elements and other valuable supporting material for engagements.

DIGITAL

MEMBER: $260
NON-MEMBER: $270

+ REALPAC ASPE Handbook

Real estate accounting can be complex. This is your one-stop source for the most up-to-date recommended accounting practices for real estate investment and development entities reporting under ASPE.

DIGITAL

MEMBER: $425
NON-MEMBER: $470

Prices subject to change

+ REALPAC Canadian REIT Handbook

It's imperative that professionals who manage real estate investment trusts be as informed as possible. This handbook will help you develop a deeper understanding of REITs – from new sources of financing to the top tax, business and legal considerations.

DIGITAL PRINT

MEMBER: $425+
NON-MEMBER: $470

+ REALPAC IFRS Handbook

What you need to navigate the ins and outs of global real estate reporting with confidence. This in-depth guide covers the top recommended accounting practices for real estate investment and development entities when applying IFRS.

DIGITAL

MEMBER: $425+
NON-MEMBER: $470

+ Selling a Private Company

Familiarize yourself with the most important challenges and opportunities that arise when selling a private company. This book also includes the Value Enhancement Framework™, a practical reference for business owners to maximize company value.

PRINT

MEMBER: $80
NON-MEMBER: $85

+ Shareholder Value: Measurement, Creation, Realization

Create more competitive advantage for your company. Our practical, hands-on publication offers insightful support on how you can enhance business value at each stage, from acquisition to succession.

DIGITAL

MEMBER: $55
NON-MEMBER: $70

+ Strategic Acquisitions

This practical guide to corporate acquisitions is specifically for executives, directors and advisors of public and privately held companies. Use it to develop an integrated framework that will help you increase shareholder value with practical decision-making tools and support.

PRINT

MEMBER: $145
NON-MEMBER: $150

Prices subject to change

+ Valuation for Financial Reporting (VFR) Certificate

Enhance your knowledge and skills in the area of valuation for financial reporting by completing this two part certificate course. Part I focuses on foundational valuation principles and methodologies. You will learn about the cost, market and income approaches to valuation as well as how to select an appropriate discount rate taking into account the company's specific circumstances. Part II takes a deeper dive into more advanced topics within valuation for financial reporting such as accounting for business combinations, valuation of intangible assets and impairment testing. Throughout both parts of the course you will be able to demonstrate the application of material using knowledge checks and in-depth case studies.

Parts I and II can be taken individually, but you must complete both to earn the certificate.

ON DEMAND 16 HOURS

MEMBER: $2590
NON-MEMBER: $2995

ONLINE AND
VIRTUAL CERTIFICATE

Prices subject to change

Leadership

+ Cross-Functional Collaboration to Deliver Critical Goals

One of the biggest challenges in strategic and operational planning is alignment. But when teamsdo collaborate across functional lines, your organization is more likely to achieve its most important goals.

This virtual classroom offers you strategies and tools for leadership using a cross-functional lens. It also demonstrates how the Supporting Lines model can not only improve your bottom line but increase employee engagement as well.

NOV. 25, 2020
3 HOURS
MEMBER: $395
NON-MEMBER: $475
VIRTUAL CLASSROOM

+ From Overwhelmed to Flourishing: Eight Steps to Thrive

Learn the eight steps it takes to thrive, including the foundations of resilience and awareness in your professional life. This webinar will equip you with practical strategies you need to better manage feeling stressed out and overwhelmed.

ON DEMAND
1 HOURS
MEMBER: $65
NON-MEMBER: $80
WEBINAR

+ Leading Organizations From a People Perspective

When was the last time you thought about your leadership style? This online course includes activities and exercises designed to provoke both self- and organizational analysis. Learn how to build a strong organizational culture that prioritizes the importance of people as agents of change, along with results-oriented ideas and action plans.

ON DEMAND
4 HOURS
MEMBER: $160
NON-MEMBER: $195
ONLINE COURSE

+ Show Up Like a Coach

Coaching isn't just a skillset; it's a mindset that can make all the difference in business. Empower your team and boost performance with evidence-based insights from award-winning executive coach, Jennifer Gervès-Keen.

Available in French.

PRINT
$27.99

+ Success Podcast Series — Upholding Professional Integrity

Integrity is the core of the CPA profession. In this podcast series, explore the current trends around financial crimes and corporate misconduct, how to be prepared for them, and how to help jeopardized businesses recover.

ON DEMAND
4 HOURS
MEMBER: $49
NON-MEMBER: $59
PODCAST

Prices subject to change

+ Success Podcast Series — Leadership 2.0

As leaders, how do CPAs and finance professionals create goodwill across their organizations and leverage their leadership characteristics?

This special podcast series is designed to complement and support real-life experiences encountered by CPAs. Listen to CPAs and other business professionals discuss the concept and importance of the personal balance sheet, as well as how to embrace diversity and inclusion in the workplace.

ON DEMAND
1 HOURS
MEMBER: $49
NON-MEMBER: $59
PODCAST

+ Traits of Today's CFO: A Handbook for Excelling in an Evolving Role

Businesses need strategic people in charge of the finance function. This book will help you improve your skills as a negotiator, communicator and visionary leader. You'll also learn about the future of work for CFOs and controllers.

DIGITAL
PRINT
MEMBER: $50+
NON-MEMBER: $55+

?

Need help?

Our team is here to answer questions and help you decide which CPA Canada products are the right fit for your career goals. Call **1-855-769-0905** or email sales@cpacanada.ca to get in touch.

Prices subject to change

Other

+ Babie$: The Real Story of How Much They Cost

If you're a new or expecting parent, this book will help you create a baby budget, plan parental leave, explore different childcare options and be aware of the hidden costs associated with a growing family.

DIGITAL | PRINT

MEMBER: $4+
NON-MEMBER: $5+

+ Procrastinator's Guide to Retirement: How You Can Retire in 10 Years or Less

This go-to guide for late starters will help you find your way through today's maze of retirement issues. Get a clear direction on what you need to do now to live comfortably when you retire.

Available in French.

DIGITAL | PRINT

MEMBER: $7+
NON-MEMBER: $10+

+ Protecting You and Your Money: A Guide to Avoiding Identity Theft and Fraud

Learn how to you protect yourself from financial fraud, including tips for spotting current scams, getting your life back on track after identity theft and find where to go for help and support.

Available in French.

DIGITAL | PRINT

MEMBER: $7+
NON-MEMBER: $10+

+ Success Podcast Series — Planning and Forecasting Considerations in Times of Crisis

There is a lot of uncertainty as we navigate through the current crisis. In this four-part podcast series, we discuss the importance of long and short-term planning and forecasting; how to deal with new challenges that lie ahead; best practices in forecasting and cash conservation; as well as tips for navigating the remote close process.

ON DEMAND | 1.5 HOURS

FREE/$29 | PODCAST

+ Success Podcast Series — Practice Management Considerations in Times of Crisis

In this four-part podcast series, all available on-demand, listen to the following experts discuss various practice management issues that firms and businesses need to navigate when going through a new environment

ON DEMAND | 1.5 HOURS

FREE/$29 | PODCAST

Prices subject to change

Performance Management

+ Building a Dynamic, Scenario-Based Forecast

A modern forecast needs to be dynamic and flexible, predicting multiple scenarios in both the short- and long-run. But changing a model that isn't working can be challenging without the right skill set.

Learn how to integrate scenario planning into your forecasting process and make more effective business decisions that allow for greater flexibility. In this virtual classroom, you'll get experience developing a robust rolling forecast model that brings value to your firm, using external parameters as drivers.

SEPT. 23, 2020
OCT. 22, 2020 | 3 HOURS

MEMBER: $395
NON-MEMBER: $475 | VIRTUAL CLASSROOM

+ COSO Enterprise Risk Management Certificate

JOINTLY PRESENTED BY AICPA

Enterprise risk management is complex. Learn how to successfully navigate it in this online program that covers the core concepts and principles of COSO's updated ERM framework.

ON DEMAND | 33.5 HOURS

$939 | ONLINE CERTIFICATE

+ COSO Internal Control Certificate

JOINTLY PRESENTED BY AICPA

Creating an effective internal control system can be challenging. Learn how to successfully design, implement and monitor one for your clients or organization in this unique online program.

ON DEMAND | 17 HOURS

$1499 USD | ONLINE CLASSROOM

+ CPA Success Podcast Series: Leadership and Performance Measurement

In this special six-part podcast series, you'll dive into a wide range of leadership and performance management (PM) topics. Discover how critical skills in leadership and PM are for a successful career.

ON DEMAND | 2 HOURS

MEMBER: $99
NON-MEMBER: $120 | PODCAST

Prices subject to change

+ Data Management Certificate

Many organizations are facing the same challenge: too much raw data and not enough refined, usable data. Companies need leaders who can navigate the implications of digital disruption, be responsive to change and make evidence-based decisions.

In this program, you will learn how to harness the power of data and turn it into meaningful information for financial and strategic purposes. The curriculum includes targeted courses that combine theory and practice on the key components of data management.

- Data Preparation I: Cleansing, Modelling and Dashboards
- Data Preparation II: Introduction to Power BI
- Data Preparation II: Introduction to Tableau
- Navigating Data Analytics
- Decision Making and Critical Thinking in a Data-Driven World
- Data Landscape for the Future Accountant

Courses can be taken individually as well, but you must complete five to earn the certificate. Only one version of Data Preparation II must be completed.

ON DEMAND

33 HOURS

MEMBER: $2995
NON-MEMBER: $3595

ONLINE CERTIFICATE

+ Better Costing, Better Operational Planning and Budgeting

Effective budgeting and operational planning are the backbone of all sustainable business models. Dig deeper into the role of both so you can improve the long-term outlook of your business.

In this virtual classroom, you'll find out what's driving the numbers and learn how to use the right tools and strategies to support better performance outcomes, including activity-based budgeting and tying plans to your organization's strategy.

SEPT. 23, 2020

3 HOURS

MEMBER: $395
NON-MEMBER: $475

VIRTUAL CLASSROOM

+ Excel Certificate

Are you ready to create functional and dynamic spreadsheets in Excel? Enhance your knowledge and skills with in-depth information on Excel formulas and functions for data analysis, spreadsheet modelling, financial analysis and more.

By the end of this ten-course program, you'll have a stronger grasp on Excel to support your work in business, accounting or finance. Learn at your own pace with support from extensive resources, ebooks and practical examples along the way.

- Introduction to Excel: Beginning the Journey to Spreadsheet Mastery
- Formulas and Functions: An Introduction to the Power of Excel
- Excel Formatting Tools: How to Add Eye-Catching Elements
- Excel Formulas and Functions: Logic and Lookups
- Excel Math and Finance Functions: Formulas for Business Decision Makers
- Excel Date and Time Functions: Theory and Application
- Excel Test and Information Functions: It's Not All About the Numbers
- Excel Tables and Tabular Data
- Introduction to Pivot Tables in Excel
- Introduction to Data Visualization: Turning Data Into Information in Excel

Courses can be taken individually as well, but you must complete all ten to earn the certificate.

ON DEMAND

29 HOURS

MEMBER: $1695
NON-MEMBER: $1995

ONLINE CERTIFICATE

+ Executing Performance Through Strategy Mapping

Take your organization's productivity to the next level by creating concrete plans that tie strategic objectives to key performance indicators.

In this course, you'll learn how to use a strategy map to achieve business objectives and successfully implement your plan. Plus, get insights on cascading goals down to the employee level and what it takes to develop a balanced scorecard.

ON DEMAND

4 HOURS

MEMBER: $279
NON-MEMBER: $335

VIDEO COURSE

+ Explaining Strategy and Understanding Innovation: The Business Model Canvas

Do you know how your business will be affected by technological, economic or social change? This course covers the advantages of using the Business Model Canvas framework as a basis for business model design. You'll learn how to properly understand and implement new strategies to prepare your company for the future.

ON DEMAND

2 HOURS

MEMBER: $169
NON-MEMBER: $210

ONLINE COURSE

+ Finance and Accounting PolicyPro

Stay ahead of the curve with this collection of up-to-date model policies based on Canadian compliance and best practices for finance and accounting.

ON DEMAND
17 HOURS
$1499 USD
ONLINE CERTIFICATE

+ Financial Risk Management: Fundamental Concepts

Financial risk is the probability of loss arising from adverse events in the marketplace. Find out what you need to know to protect your clients or organization based on guidelines from the Office of the Superintendent of Financial Institutions (OFSI).

This course will help you identify potential financial risks and understand which strategies you can use to mitigate them, such as foreign exchange rates, interest variables and credit.

ON DEMAND
3 HOURS
MEMBER: $219
NON-MEMBER: $255
ONLINE COURSE

+ Financial Structuring: Senior Debt

Is your company accessing current market terms for its senior debt or undergoing a period of growth or transition? Make sure you've set your business up for success with the right financial structure.

In this virtual classroom, you'll develop strategic debt structuring skills that are ready to apply in your day-to-day work. Learn how to maximize corporate value and reduce risk with a special focus on how to handle senior debt, revolving debt and long-term corporate debt.

TBD
3 HOURS
MEMBER: $395
NON-MEMBER: $475
VIRTUAL CLASSROOM

+ Foreign Exchange Risk Management

Do you know when to use forwards, futures or swaps? Many of the tools required to handle foreign exchange risk are well established, but managing it well requires technical expertise and practical knowledge.

In this flexible course, you'll study the key concepts of foreign exchange risk management. You will also learn about how you can effectively anticipate the market, identify risks and manage exposure.

ON DEMAND
6 HOURS
MEMBER: $295
NON-MEMBER: $355
ONLINE COURSE

Prices subject to change

+ In-Depth Brokers and Investment Dealers

The Canadian securities industry can be challenging. Equip yourself with the right knowledge and skills to navigate the important issues when providing accounting services for brokers and investment dealers.

In this comprehensive course, you will learn about the investment industry and its regulatory environment, as well as best practices in risk management, financial reporting and auditing to support your clients in securities.

Note: A prerequisite module is required, to ensure that you have a solid background on the business activities of the securities industry. It is included in the purchase of this course.

OCT. 26–27, 2020
VIRTUAL
14 HOURS
$1950
VIRTUAL CLASSROOM

+ Information Technology PolicyPro

If you need guidance on policy, compliance and best practices for IT, this resource is made for you.

DIGITAL
STARTING AT $875

+ PaySource

Stay current with Canada's only complete source of authoritative payroll information and news, accessible online from any device.

ON DEMAND
$1425

+ Practical Aspects of Business Valuation

Expand your accounting skills by learning how to conduct simple, informal business valuations for your clients. This self-paced online course covers the key principles and practices of business valuation in a Canadian context.

You will learn about core valuation theory as well as the practical fundamentals of performing custom business valuations that consider a company's industry as well as its unique characteristics and circumstances.

ON DEMAND
8 HOURS
MEMBER: $349
NON-MEMBER: $399
ONLINE COURSE

Prices subject to change

+ Performance Management and Strategy Certificate

Performance management (PM) and strategy drive real value in finance and business. This two-part certificate program will help you implement evidence-based decisions, lead a more agile corporation and increase profitability using practical business tools like strategy maps and a balanced scorecard.

You'll also learn how apply best practices in PM to achieve clear, measurable outcomes that impact all levels of an organization through a Harvard Business School simulation. This includes the integration of core concepts like strategic positioning, cascading goals, cost management, pricing and more.

Parts I and II can be taken individually as well, but you must complete both to earn the certificate.

PART I: ON DEMAND
PART II: JUN 23, 2020
NOV. 24, 2020
DEC. 3, 2020

40 HOURS

$2890

ONLINE AND VIRTUAL CERTIFICATE

+ Pricing and Customer Profitability

Your organization can significantly increase its bottom line with a better understanding of contribution margin, pricing and customer profitability.

This course will help you get there with a high-level overview of the key ingredients required to create an effective pricing strategy. Create a roadmap to help increase your bottom line and begin your journey managing profitability and pricing.

ON DEMAND

6 HOURS

MEMBER: $449
NON-MEMBER: $499

ONLINE COURSE

+ 20 Questions Directors Should Ask About Building and Sustaining a Board

If you want a high-performing board, the quality and experience of individuals who serve – and the way they work together – is paramount. This publication will guide you through the various stages of board evolution, from creation to renewal.

Available in French.

PRINT

MEMBER: $20+
NON-MEMBER: $25+

+ 20 Questions Directors Should Ask About Directors' and Officers' Indemnification and Insurance

Developed to help directors and officers assess the effectiveness of corporate indemnification and director and officer insurance programs, this book will help you navigate the critical elements of building a successful protection program.

Available in French.

PRINT

MEMBER: $20+
NON-MEMBER: $25+

+ Success Podcast Series — Staying Relevant in Market

In the age of technology and artificial intelligence, how can practitioners distinguish themselves and provide great client value?

This special podcast series is designed to complement and support real-life experiences encountered by CPAs. Listen to CPAs and other business professionals discuss how to transform your way of thinking and transform your practice into one that provides the utmost client value.

ON DEMAND

1 HOUR

$49

PODCAST

+ Business Matters Newsletter

A newsletter designed to help you communicate with your clients on a regular basis, while providing them with practical information about the latest news in tax, tech, management, insurance, investments, law and more. Customize it by reproducing with your firm's letterhead.

DIGITAL

MEMBER: $325+
NON-MEMBER: $355+

+ Budgeting: Techniques and Applications

Learn about the three Ps of budgeting and what's critical to planning for success. This book will also help you problem solve for specific financial issues and build skills in forecasting for continuous improvement.

DIGITAL

PRINT

$50+

+ Business Valuation

An in-depth explanation for you of the key principles, methodologies and approaches used in business valuation today, such as valuation assignments, income tax considerations, balance sheet adjustments and intangible assets.

DIGITAL

PRINT

MEMBER: $89+
NON-MEMBER: $100+

+ Case Studies on ERM Implementation: Practical Illustrations for Launching Effective Enterprise Risk Oversight

Put yourself in the shoes of a company that's starting to formally address risk. This detailed case study provides step-by-step explanations of the process to work with the board and senior management to identify and rate significant risk categories.

DIGITAL PRINT

MEMBER: $25+
NON-MEMBER: $30+

+ Fraud Risk Management Guide

Want to reduce risk and deter fraud? Issued by the Committee of Sponsoring Organizations of the Treadway Commission (COSO), this publication lays out best practices for boards, senior management and staff at every level.

DIGITAL PRINT

MEMBER: $55+
NON-MEMBER: $70+

+ Internal Control — Integrated Framework

Do you understand the five core components of internal control? This publication will help you design an effective system and address the importance of sound judgment through an executive summary, integrated framework, appendices and illustrative tools for assessment.

DIGITAL

MEMBER: $140
NON-MEMBER: $145

+ Overseeing Mergers and Acquisitions: A Framework for Boards of Directors

A robust framework to help you oversee successful mergers and acquisitions while maximizing shareholder value. Explore the full life cycle of M&A work, from strategy and transaction develop to implementation and post-closing activities.

Available in French.

PRINT

MEMBER: $35
NON-MEMBER: $45

+ Overseeing Strategy: A Framework for Boards of Directors

Many boards find the effective overseeing of strategy a challenging task. This practical framework can help you learn how to more effectively oversee the strategic planning process – from preparation and strategy formulation to execution and monitoring results.

Available in French.

PRINT

MEMBER: $35
NON-MEMBER: $45

+ Selling a Private Company

Familiarize yourself with the most important challenges and opportunities that arise when selling a private company. This book also includes the Value Enhancement Framework™, a practical reference for business owners to maximize company value.

PRINT

MEMBER: $80
NON-MEMBER: $85

+ Shareholder Value: Measurement, Creation, Realization

Create more competitive advantage for your company. Our practical, hands-on publication offers insightful support on how you can enhance business value at each stage, from acquisition to succession.

DIGITAL

MEMBER: $55
NON-MEMBER: $70

+ Small Company Boards: Questions for Potential Advisors and Directors

When you join the board of a small company, you have to implement good governance practices. This guide will help you fulfill your responsibilities by providing insights on the different roles of advisory and fiduciary boards, as well as what skills you need to excel.

Available in French.

PRINT

MEMBER: $20
NON-MEMBER: $25

+ Strategic Acquisitions

This practical guide to corporate acquisitions is specifically for executives, directors and advisors of public and privately held companies. Use it to develop an integrated framework that will help you increase shareholder value with practical decision-making tools and support.

PRINT

MEMBER: $145
NON-MEMBER: $150

Risk Management and Internal Control

+ Strategy and Planning Toolkit for Small and Medium Businesses

A quick-access reference for business owners. Get to know the valuable tools you need to craft and execute the right strategy using a structured, step-by-step process that includes hands-on tools and techniques, descriptive charts and relevant tips.

Available in French.

DIGITAL PRINT

MEMBER: $15+
NON-MEMBER: $20+

+ Traits of Today's CFO: A Handbook for Excelling in an Evolving Role

Businesses need strategic people in charge of the finance function. This book will help you improve your skills as a negotiator, communicator and visionary leader. You'll also learn about the future of work for CFOs and controllers.

DIGITAL PRINT

MEMBER: $50+
NON-MEMBER: $55+

+ 20 Questions Directors Should Ask About Internal Audit

The complexity of audit continues to grow as businesses face new cybersecurity risks, increased regulation and other factors like economic uncertainty. Help your organization weather the evolving impact of changes in governance, risk, compliance and future value.

Available in French

PRINT

MEMBER: $20+
NON-MEMBER: $25+

+ A Framework for Board Oversight for Enterprise Risk

Does your company's board know its role in mitigating risk? Tap into valuable guidance and that will help you and your directors better identify critical risks and recognize the potential compounding effects of risk during a crisis.

PRINT

MEMBER: $30
NON-MEMBER: $40

+ Case Studies on ERM Implementation: Practical Illustrations for Launching Effective Enterprise Risk Oversight

Put yourself in the shoes of a company that's starting to formally address risk. This detailed case study provides step-by-step explanations of the process to work with the board and senior management to identify and rate significant risk categories.

DIGITAL PRINT

MEMBER: $25+
NON-MEMBER: $30+

+ Fraud Risk Management Guide

Want to reduce risk and deter fraud? Issued by the Committee of Sponsoring Organizations of the Treadway Commission (COSO), this publication lays out best practices for boards, senior management and staff at every level.

DIGITAL PRINT

MEMBER: $55
NON-MEMBER: $70

PROFESSIONAL DEVELOPMENT CATALOGUE - FOR INDUSTRY

+ Guidance for Directors: Disclosure and Certification — What's at Stake?

As a director, you face a higher risk of liability under securities class action if you misrepresent company statements or fail to make timely disclosures. This useful book sets out the key elements of a certification support process to help you ensure reliability and reduce risk.

Available in French.

PRINT

MEMBER: $20+
NON-MEMBER: $25+

+ Internal Control — Integrated Framework

An in-depth explanation for you of the key principles, methodologies and approaches used in business valuation today, such as valuation assignments, income tax considerations, balance sheet adjustments and intangible assets.

DIGITAL

MEMBER: $140
NON-MEMBER: $145

+ Risk Oversight and Governance Collection

An ongoing series of concise publications that can help board leaders deal with the most relevant governance issues facing modern organizations. Learn how to ask tough questions, recognize common problems and implement best practices for your industry.

Available in French.

DIGITAL

MEMBER: $225
NON-MEMBER: $235

Sustainability

+ Corporate Social Responsibility and Ethics

Discover what defines the CSR landscape today, including what it means to be good corporate citizen and the role that ethics play in business matters across different industries.

In this course, you'll learn how to help your organization enhance accountability, consider the implications of environmental accounting and reporting, and apply other best practices in corporate governance.

ON DEMAND

4 HOURS

MEMBER: $189
NON-MEMBER: $239

ONLINE COURSE

+ Finding Success Through Resilience and Adaptability: Contemporary Matters

Resilience – the ability to react and adapt – is key to business success. Learn more about what trends are relevant to the world of business and accounting in this four-part video series where the experts weigh in on integrating reporting, capital expenditures, climate disclosures and natural capital.

ON DEMAND

1 HOUR

$59 TO $175

VIDEO SERIES

Tax

+ Accounting for Income Taxes

Learn the fundamentals of accounting for income taxes in Canada under both IFRS and ASPE. This introductory course covers the key concepts of accounting for income taxes, including recognition, measurement, valuation, presentation and disclosure.

You'll build skills in accounting methodology for income tax and finish with a stronger grasp on issues like deferred tax and GAAP measures for Canadian entities.

ON DEMAND
20 HOURS
MEMBER: $795
NON-MEMBER: $895
ONLINE COURSE

+ Ethics and Tax

An overview of ethics in the tax profession. Learn how to apply key concepts in ethics to the issues you face every day in your tax practice and hear from a wide range of tax practitioners about their experiences with ethics in tax.

You'll get an overview of ethics in the profession, including why it's essential to a successful tax practice, and review best practice models for ethical decision making.

ON DEMAND
4 HOURS
MEMBER: $289
NON-MEMBER: $335
ONLINE COURSE

+ GST/HST Course

With this course, you'll get a broad overview of GST/HST-related topics, including useful tips on how to resolve common problems. Take time to develop your knowledge about major indirect tax issues, starting with the basics and moving toward more technical subjects.

You'll also have the chance to review recent developments in GST/HST and how they may impact your clients, like place of supply rules, import/exports, ITC claims and more.

ON DEMAND
12 HOURS
MEMBER: $475
NON-MEMBER: $525
ONLINE COURSE

+ In-Depth Corporate Reorganizations

Building on corporate reorganization concepts introduced in the In-Depth Tax Program, this course covers the most recent amendments, issues, and strategies for corporate reorganizations.

In this course, you will dive into detailed, technical tax rules and learn how to identify tax planning opportunities for your clients or organization. You'll also explore the most effective methods for handling corporate purchases, sales and restructuring.

Note: Some advance online study and reading is required.

Prerequisite: Completion of the In-Depth Tax Program and two or more years of work experience in tax full-time work experience in tax. Some admissions may be made by special request. Additional in-residence and facility fees apply.

CANCELLED FOR 2020
25 HOURS
$3495
IN-PERSON COURSE

+ In-Depth GST/HST

This comprehensive course delivers the in-depth foundational GST/HST training you need to succeed. Build a strong foundation of knowledge to create value-added benefits when advising about GST/HST.

You'll learn about the current indirect tax landscape across different sectors, along with policy, compliance and regulatory considerations. You'll also have the chance to address research techniques, special rules, input tax credits, inbound supplies, non-resident issues and more.

Note: Some advance online study and readingis required.

MAY 30 – JUN. 4, 2021
NIAGARA-ON-THE-LAKE, ON
34 HOURS
$3195
PLUS FACILITY FEE
IN-PERSON COURSE

+ In-Depth International Tax

Expanding on the international tax concepts covered in the In-Depth Tax Program, this course covers the top issues surrounding the taxation of foreign operations.

You'll learn about the most effective planning strategies to minimize tax as it applies to businesses that either are expanding, or are considering expansion, outside of Canada. Plus, get advice from the experts on how to navigate foreign affiliate financing, inbound taxation, active business rules and foreign accrual property income.

Note: Some advance online study and readingis required.

Prerequisite: Completion of the In-Depth Tax Program and two or more years of full-time experience in tax. Some admissions may be made by special request. Additional in-residence and facility fees apply.

CANCELLED FOR 2020
25 HOURS
$3495
IN-PERSON COURSE

+ In-Depth Tax Issues for the Owner-Managed Business

Take what you learned in the In-Depth Tax Program to the next level. This course is designed for tax professionals who work predominantly with owner-managed businesses, as well as those in industry who want to expand their knowledge.

Get practical solutions to help you navigate the intricate financial situations facing business owners today, including how to handle owner-manager renumeration and plan effectively for insurance, business succession, retirement and post-mortem taxation.

Note: Some advance online study and reading may be required.

Prerequisite: Completion of the In-Depth Tax Program and two or more years of full-time experience in tax. Some admissions may be made by special request. Additional in-residence and facility fees apply.

CANCELLED FOR 2020
25 HOURS
$3495
IN-PERSON COURSE

+ In-Depth Tax Program

The most comprehensive, practical and relevant income tax training in Canada. Build a strong foundation of the fundamental tax knowledge you need to succeed as a tax professional. It's an essential step for professional accountants seeking senior tax positions in advisory firms and corporate Canada.

This three-year program features an overview of the current Canadian tax landscape, covering more than 60 essential tax topics. It includes online learning, in-person group sessions and three seven-day residencies. The curriculum blends theory and on-the-job experience, including new technologies and an updated format to enrich your educational experience. This three-year program features an overview of the current Canadian tax landscape, covering the foundational tax topics. It includes online learning, virtual and in-person group sessions and three six-day residencies. The curriculum blends theory and on-the-job experience, including an updated format to enrich your educational experience.

Note: This program requires that you have access to sufficient mentoring from a senior tax professional.

Requirements: You must be employed full-time in a tax role and spend at least 70 per cent of your time working on income tax matters. You must also be one of the following to qualify: a CPA; a lawyer called to the Canadian Bar; a CPA student or articling at a Canadian law firm; a university graduate.

STARTING FALL 2020 MULTIPLE LOCATIONS
UP TO 185HRS/YEAR
MORE INFO ONLINE
IN-PERSON AND ONLINE LEARNING

+ Introduction to the Canadian *Income Tax Act*

The *Income Tax Act* is an essential reference point for all tax practitioners in Canada – whether you're a beginner or more experienced, and as a generalist or a specialist. Learn how to read and decode provisions as you deepen your understanding of this backbone piece of legislation.

ON DEMAND
1 HOUR
MEMBER: $59 NON-MEMBER: $75
ONLINE COURSE

+ Introduction to Transfer Pricing

Cover the core principles of Canadian transfer pricing and learn how to navigate the most relevant issues facing international businesses today.

With the latest guidance from the OECD and federal legislation, this course will help you understand the role of your organization and how its fits into the current transfer pricing landscape. You'll also build a solid foundation of knowledge in key areas, including core methodology, transactional profit sand comparability analysis.

ON DEMAND
12 HOURS
MEMBER: $765 NON-MEMBER: $895
ONLINE COURSE

+ Overview of Canadian Tax and Law

If you are providing guidance to clients on income tax matters, Canada's tax and legal systems have critical touch points you need to keep top of mind. This course provides an overview of both systems.

Your learning will be divided into two sections. The tax section explains the objectives and the structure of the Canadian tax system, outlining sources of income, allowable deductions and the general scheme for determining income for tax purposes. The law section will bring you up to speed on the tools and concepts you need in commercial transactions and contract law.

ON DEMAND
15 HOURS
MEMBER: $595
NON-MEMBER: $655
ONLINE COURSE

+ Safe Income and Safe Income on Hand

Explore the fundamentals of safe income and safe income on hand for Canadian corporations. This course will help you stay on top of the most recent legislative changes to the *Income Tax Act*.

You'll also learn about other key pieces of information you need to know as a tax professional, including how to calculate safe income, what the exceptions are, capital gains stripping and allocating safe income to various share classes.

ON DEMAND
14 HOURS
MEMBER: $595
NON-MEMBER: $695
ONLINE COURSE

+ Scientific Research and Experimental Development (SRED) Fundamentals

This course provides an overview of the federal and provincial SR&ED programs, expenditure categories and compliance requirements.

You'll learn about SR&ED deductions and investment tax credits, qualifying expenditures, audit review process and court cases.

ON DEMAND
12 HOURS
MEMBER: $595
NON-MEMBER: $695
ONLINE COURSE

+ Specialized GST/HST: Cross-Border Transactions

This course is a must for tax professionals who deal with cross-border activities. Dive into the complex GST/HST areas of non-residents and cross-border transactions.

You'll learn about sector-specific issues in ecommerce and important financial services, how to avoid or recover tax, including drop shipment rules, and other important reporting and compliance obligations.

ON DEMAND
12 HOURS
MEMBER: $765
NON-MEMBER: $895
ONLINE COURSE

Prices subject to change

+ Specialized GST/HST: Financial Services

Examine the dynamic indirect tax concepts and complex legislation that apply to financial institutions, services and pensions. This course is an ideal opportunity to expand your learning from the In-Depth GST/HST Course while building on practical experiences from your day-to-day financial work.

Be prepared to explore the latest changes in this important area of GST/HST. You will learn about compliance for financial institutions, input tax credits, special rules for seizures and repossessions, pension plans, cross-border assessment and more.

CANCELLED FOR 2020
15 HOURS
MEMBER: $995
NON-MEMBER :$1195
TBD

+ Specialized GST/HST: Real Property

Real property transactions are usually taxable, however there are a number of special situations with exceptions to the rule.

In this specialized course, you will focus on how the most current GST/HST rules apply to residential and commercial properties, the sale of land and rebates. Enhance your technical tax knowledge and learn valuable strategies you can successfully apply to real client situations.

ON DEMAND
12 HOURS
MEMBER: $765
NON-MEMBER: $895
ONLINE COURSE

+ U.S. Corporate Tax for the Canadian Practitioner

This course is designed for Canadian practitioners who advise corporations that operate in the U.S. that may be subject to U.S. taxation. Make sure you understand the core concepts and critical American tax issues you need to know when dealing with client transactions south of the border.

You'll learn about the U.S. corporate tax system, including state and local taxes, how to calculate federal income tax and key elements of tax administration and reporting.

ON DEMAND
10 HOURS
MEMBER: $475
NON-MEMBER: $525
ONLINE COURSE

+ U.S. Personal Tax for the Canadian Practicioner

Build your knowledge and skills in U.S. person income tax, including how to determine residency status, filing requirements for U.S. tax returns and key considerations for Canadians in the U.S. as well as U.S. citizens in Canada. You'll also learn how to minimize double taxation and determine estate and gift taxes.

ON DEMAND
8 HOURS
MEMBER: $349
NON-MEMBER: $399
ONLINE COURSE

Prices subject to change

+ Canadian Tax Principles

With 700+ pages of reliable information, Byrd and Chen's book is the industry standard for general practitioners. Resolve tax issues with confidence and get straightforward answers to all of your personal and corporate tax questions.

DIGITAL PRINT

MEMBER: $105
NON-MEMBER: $125

+ Collection APFF

This collection includes texts published by the Tax and Financial Planning Association on income tax, indirect tax, financial planning, retirement and succession. It covers annual congresses, symposia, strategy, budget analysis and more from 1991 to present.

Available in French.

DIGITAL

$1871+

+ Commodity Tax News

Stay on top of the latest developments in GST/HST, provincial sales taxes, and customs and trade issues. This subscription also includes access to Case Corner, which summarizes recent commodity tax decisions, and What's New, which lists recent government releases.

DIGITAL

MEMBER: $255
NON-MEMBER: $280

+ Couzin Taylor's Guide to Canadian Income Tax Administration

An accessible look at administrative practices of Canada's *Income Tax Act*, covering major topics such as: tax returns; interest; assessments and audits; disclosures and requests for information; objections and appeals; the trial process; and dispute resolution.

DIGITAL

MEMBER: $40
NON-MEMBER: $45

+ Customs Automated Reference Library

Your comprehensive searchable library for customs tax information. Use it to quickly classify goods, look up duty rates, establish correct value for duty and determine the origin of imported goods.

Custom options available: CARL and CARL Plus.

Available in French.

DIGITAL

MEMBER: $1665
NON-MEMBER: $1835+

+ Customs Tariff

A subscription that will help you familiarize yourself with the most up-to-date customs tariff regulations and law. It includes coverage on current provisions, earlier versions and other important information with full search functionality.

Available in French.

DIGITAL

MEMBER: $360
NON-MEMBER: $400

+ Director's Briefing: Board Oversight of Tax Risk

Risks can arise as a result of both ongoing tax planning processes and extraordinary transactions. This book will help you execute your oversight responsibilities with confidence by addressing the role of boards versus audit committees in managing tax risk.

Available in French.

PRINT

MEMBER: $20
NON-MEMBER: $25

+ Excise Automated Reference Library

Have all the key excise tax info on hand that you need with this premier GST/HST reference library. EARL includes coverage of important legislation such as the Excise Tax Act plus other GST/HST regulations, case law and CRA rulings, bulletins, forms and guides.

Custom options available: EARL and EARL Lite.

Available in French.

DIGITAL

MEMBER: $1395
NON-MEMBER: $1465

+ EY's Complete Guide to GST/HST

Canada's leading resource on GST/HST commentary and legislation, as well as a GST-QST comparison. This comprehensive guide is written in plain language by a team of EY indirect tax professionals.

DIGITAL PRINT

$109+

+ EY's Federal Income Tax Act

Everything you need to navigate Canadian income tax. Take charge with this comprehensive guide and streamline your work thanks to interactive online features, purpose notes and other reference materials.

DIGITAL PRINT

$159.50

+ EY's Guide to Canada's Foreign Affiliate Taxation Rules

Boost your knowledge on the key components of Canadian tax law and all related compliance issues for investments in foreign affiliates. You won't miss a step thanks to plenty of detailed examples and a searchable database.

DIGITAL PRINT

$299+

+ EY's Guide to Capital Cost Allowance

Explore the capital cost allowance and eligible expenditure rules that determine income tax treatment for capital assets and outlays. This handy book also includes cross-references to legislation, case law and administrative materials, plus CCA lookup tables.

DIGITAL

$89

+ EY's Guide to Income Tax

Clear and authoritative guidance you can count on, written in plain language by EY tax professionals. This guide reflects both current and proposed tax legislation in Canada, which is available on its own or as a part of the Federal Income Tax Act Collection.

DIGITAL

MEMBER: $1355
NON-MEMBER: $1480

+ EY's Guide to Preparing Personal Tax Returns

With this line-by-line guide, you'll have everything you need. Save time and increase productivity during the busy tax season with clear commentary, practical examples and helpful tools, all right at your fingertips.

DIGITAL

MEMBER: $175
NON-MEMBER: $190

+ EY's Guide to Scientific Research and Experimental Development

Interested in Canada's SR&ED program? Learn how to file successful SR&ED claims for your firm with this handy resource that covers tax benefits and new legislation, along with the latest CRA rules governing SR&ED expenditures and tax credits.

DIGITAL

$89

+ EY's Guide to Tax Research and Writing

Learn what goes into the tax research process, including how laws are enacted and how to best communicate your findings to clients. Written for you by accountants, lawyers, and other professionals who have a basic familiarity with the concepts and principles of Canadian income tax.

DIGITAL

$39.50

Prices subject to change

+ EY's Guide to the Taxation of Insurance Corporations in Canada

An easy-to-use reference guide for tax professionals that addresses the main aspects of federal and provincial corporate tax for insurance companies in Canada. All of the commentary within is cross-referenced to the relevant legislation, court cases and administrative material.

PRINT

$195+

+ EY's Guide to the Taxation of Mining Operations

If you work in the Canadian mining industry, this comprehensive reference guide will help you interpret and apply the appropriate rulings and case law under the *Income Tax Act* and your provincial or territorial legislation.

DIGITAL

$89

+ Federal Budget Commentary

This in-depth and professional guide is written annually by a dedicated team of the country's leading tax specialists. Whether you work in public practice or industry, it's an excellent resource to understand the implications of new budgetary measures.

Available in French.

DIGITAL

$250

+ Federal Income Tax Act Collection

Your ultimate federal income tax collection. FITAC combines a valuable package of reference materials with in-depth tax commentary and case law; CRA forms, publications and rulings; explanatory notes and legislative overview plus tax newsletters delivered straight to your inbox.

Custom options available: FITAC Lite, Platinum, Plus and Premium.

Available in French.

DIGITAL

MEMBER: $1090+
NON-MEMBER: $1190+

+ Financial Executive Tax Collection

Stay current on legal changes that could impact compliance and cash flow at your company. Use this collection to keep track of the latest income tax developments when overseeing accounting for income taxes, including quarterly and annual tax provisions.

DIGITAL

MEMBER: $1055+
NON-MEMBER: $1100+

Prices subject to change

+ FST and Excise Tax Cases/RISE

A handy reference that addresses excise tax cases from 1930 to present day, along with rulings, memoranda and other information for the former federal sales tax.

DIGITAL

MEMBER: $710
NON-MEMBER: $820

+ Knotia News

Stay current on all the latest tax developments with customized email alerts that give you what you need, when you need it. This includes commentary from EY tax professionals, as well as relevant releases from Canada Revenue Agency, the Department of Finance and Canadian court rulings.

Custom options available: Choose one topic to receive information about or bundle several options together, it's up to you.

CUSTOMS AND TRADE

EMAIL ALERT

MEMBER: $155+
NON-MEMBER: $180+

FEDERAL INCOME TAX

EMAIL ALERT

MEMBER: $265+
NON-MEMBER: $280+

GST/HST & EXCISE

EMAIL ALERT

MEMBER: $175+
NON-MEMBER: $180+

PROVINCIAL TAXES

EMAIL ALERT

MEMBER: $175+
NON-MEMBER: $180+

+ Personal Automobile Log

Looking for ways to grow your practice this year? Updated to reflect revised CRA administrative policy, this book is an ideal resource to share with clients who own or lease a car for business purposes. It'll help them keep more accurate records to support auto expense claims.

Available in French.

PRINT

MEMBER: $150+
NON-MEMBER: $160+

+ Professional Accountant's Reference Service

Find everything you need, all in one place. A PARS subscription comes with some of our most popular titles, including the complete C*PA Canada Standards and Guidance Collection*, the *Federal Income Tax Collection Lite* and *EY's Complete Guide to GST/HST*.

Custom options available: PARS and PARS Plus.

DIGITAL

MEMBER: $1180
NON-MEMBER: $1620

+ Provincial Taxes

Canada's most up-to-date source on provincial tax. This subscription includes commentary and analysis; statutes and regulations; forms and guides; comparative tables; and other tax rate reference tools. You'll also receive related tax newsletters delivered straight to your inbox.

Custom options available: Ontario, Quebec, Atlantic, Western Provinces.

Available in French.

DIGITAL

MEMBER: $760
NON-MEMBER: $795

+ Provincial Taxes Electronic Reference Library

Looking for a reliable roundup of provincial tax materials? This resource includes commentary, analysis and tools for key areas - from income to fuel, sales, tobacco and more. PERL also allows you to compare the tax rates and treatment of similar items by jurisdiction.

DIGITAL

MEMBER: $1725
NON-MEMBER: $1815

+ Tax Suite

Whether you're looking for insights on common tax issues, line-by-line references or new tips to better manage risk, Tax Suite can help you solve more tax problems. Access it 24/7 thanks to Knotia's reliable, always-online database.

Custom options available: **Ontario**, **Quebec**, **East**, **West** and **Premium**.

Available in French.

DIGITAL

MEMBER: $1430+
NON-MEMBER: $2445+

+ REALPAC Canadian REIT Handbook

It's imperative that professionals who manage real estate investment trusts be as informed as possible. This handbook will help you develop a deeper understanding of REITs – from new sources of financing to the top tax, business and legal considerations.

DIGITAL

MEMBER: $425
NON-MEMBER: $470

Technology

+ Robotic Process Automation Certificate

Learn about robotic process automation benefits and how the use of software robots can enable your business or clients to become more competitive and agile.

You will gain an understanding of the risks, opportunities, and organizational impact of automation while learning the decision criteria and key considerations needed to build a business case and run a successful proof-of-concept. You will also understand the steps and governance needed to implement successfully.

The certificate program is comprised of six online modules, each followed by an online quiz to earn the certificate.

ON DEMAND

14 CPD HOURS

$759

ONLINE CERTIFICATE

+ National Technology Forum

Gain a better understanding of how innovative emerging resources, tools and trends across the tech landscape will impact your business. This event covers everything from big data and artificial intelligence to cloud computing, blockchain, new enterprise resource planning platforms and more.

You will have the opportunity to learn from high profile keynotes in the tech world, get practical guidance on the latest tech solutions and feature comparisons, plus attend interactive roundtables and workshops that support strong performance outcomes.

JAN. 11–12, 2021

20 HOURS

STARTING AT $495

VIRTUAL CONFERENCE

cpacanada.ca/techforum

+ Cybersecurity Frameworks Certificate

Growing concerns about cybersecurity are changing how companies in every industry approach risk management. In this two-course certificate program, you will learn how to protect your organization's data and become a strategic advisor on cybersecurity issues.

The first course focuses on the essentials of IT security and threats, while the second offers practical insights on how to select the right security framework for your business.

Courses can be taken individually as well, but you must complete both to earn the certificate.

ON DEMAND
10 HOURS
$498
ONLINE CERTIFICATE

+ Data Management Certificate

Many organizations are facing the same challenge: too much raw data and not enough refined, usable data. Companies need leaders who can navigate the implications of digital disruption, be responsive to change and make evidence-based decisions.

In this program, you will learn how to harness the power of data and turn it into meaningful information for financial and strategic purposes.

The curriculum includes targeted courses that combine theory and practice on the key components of data management.

- Data Preparation I: Cleansing, Modelling and Dashboards
- Data Preparation II: Introduction to Power BI
- Data Preparation II: Introduction to Tableau
- Navigating Data Analytics
- Decision Making and Critical Thinking in a Data-Driven World
- Data Landscape for the Future Accountant

Courses can be taken individually as well, but you must complete five to earn the certificate. Only one version of Data Preparation II must be completed.

ON DEMAND
33 HOURS
MEMBER: $2995
NON-MEMBER: $3595
ONLINE CERTIFICATE

+ Excel Certificate

Are you ready to create functional and dynamic spreadsheets in Excel? Enhance your knowledge and skills with in-depth information on Excel formulas and functions for data analysis, spreadsheet modelling, financial analysis and more.

By the end of this ten-course program, you'll have a stronger grasp on Excel to support your work in business, accounting or finance. Learn at your own pace with support from extensive resources, ebooks and practical examples along the way.

- Introduction to Excel: Beginning the Journey to Spreadsheet Mastery
- Formulas and Functions: An Introduction to the Power of Excel
- Excel Formatting Tools: How to Add Eye-Catching Elements
- Excel Formulas and Functions: Logic and Lookups
- Excel Math and Finance Functions: Formulas for Business Decision Makers
- Excel Date and Time Functions: Theory and Application
- Excel Test and Information Functions: It's Not All About the Numbers
- Excel Tables and Tabular Data
- Introduction to Pivot Tables in Excel
- Introduction to Data Visualization: Turning Data Into Information in Excel

Courses can be taken individually as well, but you must complete all ten to earn the certificate.

ON DEMAND
29 HOURS
MEMBER: $1695
NON-MEMBER: $1995
ONLINE CERTIFICATE

+ Information Technology PolicyPro

If you need guidance on policy, compliance and best practices for IT, this resource is made for you.

DIGITAL
STARTING AT $875

+ Staying Ahead of the Disruption Curve: Technology Solutions 2018 Podcast Series

How does technology affect the way CPAs make business decisions? This special series recaps discussions from the National Technology Forum. Listen to industry experts discuss the intricacies of emerging technology, enterprise resource planning implementation and cybersecurity.

ON DEMAND
2 HOURS
MEMBER: $99
NON-MEMBER: $120
PODCAST

+ Technology Issues Facing CPAs

Stay on top of the latest issues in cybersecurity, big data, analytics, artificial intelligence, blockchain and cloud computing. This webinar will give you a high-level overview, with professionals weighing in on how these tech developments are having a profound effect on businesses and CPAs.

ON DEMAND
1 HOUR
MEMBER: $59
NON-MEMBER: $75
WEBINAR

+ Business Matters Newsletter

A newsletter designed to help you communicate with your clients on a regular basis, while providing them with practical information about the latest news in tax, tech, management, insurance, investments, law and more. Customize it by reproducing with your firm's letterhead.

DIGITAL

MEMBER: $325+
NON-MEMBER: $355+

+ CPA Canada Guide: Reporting on an Entity's Cybersecurity Risk Management Program and Controls

Learn how to protect your organization from digital threats using the System and Organization Controls (SOC) guide for cybersecurity assurance engagement, which has been adapted by CPA Canada from the AICPA version to meet Canadian standards.

DIGITAL

MEMBER: $69
NON-MEMBER: $89

+ Success Podcast Series — Staying Relevant in Market

In the age of technology and artificial intelligence, how can practitioners distinguish themselves and provide great client value?

This special podcast series is designed to complement and support real-life experiences encountered by CPAs. Listen to CPAs and other business professionals discuss how to transform your way of thinking and transform your practice into one that provides the utmost client value.

ON DEMAND | 1 HOUR

$49 | PODCAST

+ Success Podcast Series — Technology and Social Trends for CPAs

The world around us is changing and, as CPAs, we need to acknowledge that our profession is also changing.

This special podcast series is designed to complement and support real-life experiences encountered by CPAs. Listen to CPAs and other business professionals discuss the latest hypes and trends around technology, as well as the relevant frameworks and developments in a society where sustainability and social issues matter.

ON DEMAND | 1 HOUR

MEMBER: $49
NON-MEMBER: $59 | PODCAST

Practitioner

Table of Contents

PROFESSIONAL DEVELOPMENT CATALOGUE – FOR THE PRACTITIONER

Advisory Services

+ Accountant's Flight Plan: Best Practices for Today's Firms

Find your way forward with practical, time-tested strategies that will take your practice to a higher level. This book blends practical examples with testimonials and questions to help you cultivate best practices for your firm.

Available in French

DIGITAL PRINT

MEMBER: $50
NON-MEMBER: $55

+ Personal Financial Planner’s Manual

Create a successful financial plan with all the important facts, figures and information you need in one place. Quarterly updates to the manual will also help you stay up-to-date on the latest changes in this rapidly growing field.

DIGITAL

$295

+ The Purchase and Sale of an Accounting Practice

Navigate the transaction process with confidence. Focusing on small and medium-sized practices, this book provides useful information for you as a buyer or seller on pricing and valuation, deal structure, legal considerations and more.

DIGITAL

MEMBER: $85
NON-MEMBER: $90

Audit

+ Analytical Procedures: A Guide for Practitioners

In this course, you will learn about analytical procedures for the planning, examination and final review phases of the audit process. This includes when to exercise professional judgement and how you can manage the more volatile results for smaller firms.

This course applies the context of CAS 500, CAS 315 and CAS 520.

ON DEMAND 3 HOURS

MEMBER: $219
NON-MEMBER: $255

ONLINE COURSE

+ Auditing Not-for-Profit Organizations

Accounting practices and audit standards for not-for-profits have changed in recent years. Make sure your knowledge and skills are up-to-date in this specialized practice area.

In this course, you’ll cover each phrase of the auditing process, from client and engagement acceptance to issuing the independent auditor’s report. You’ll also learn about risk assessment and how Canadian Auditing Standards apply to NFPs, plus best practices for the roles of auditor, management and board.

ON DEMAND 8 HOURS

MEMBER: $349
NON-MEMBER: $399

ONLINE COURSE

+ Bringing Artificial Intelligence to Financial Audit

Improved computing power and big data are changing the realities of how organizations adopt artificial intelligence (AI) and machine learning.

But did you know that AI can improve efficiency and effectiveness in the audit process? In this free webinar, you will learn about how AI can be harnessed to transform the internal and external audit space.

ON DEMAND 1 HOUR

FREE WEBINAR

+ Materiality and Risk in Audit and Review Engagements

The relevance of materiality and risk are on the rise. Find out why they increasingly apply to a wider scope of assurance engagements how it could impact your work. In this course, you’ll learn how to determine materiality, reduce the likelihood of material misstatements going undetected and respond to different levels of audit risk.

ON DEMAND 3 HOURS

MEMBER: $219
NON-MEMBER: $255

ONLINE COURSE

PROFESSIONAL DEVELOPMENT CATALOGUE - FOR PRACTITIONER

+ The Inventory Count Process for Auditors

If inventory is material to financial statements, then auditors are required to attend a physical count. When executed poorly, this can cause frustrations for both auditor and client, leading to inefficiencies.

Using short case studies, you will learn how to address common issues during the inventory count process. This virtual classroom will also show you how your team can integrate best practices during each stage of the process.

ON DEMAND
2 HOURS
MEMBER: $395
NON-MEMBER: $475
ONLINE COURSE

+ A Guide for the Auditor of a Candidate in a Federal Election

Learn about the significant reporting requirements you'll need to address when auditing electoral campaign returns for federal candidates. This covers specific responsibilities under the *Canada Elections Act*, from contributions and expenses to withdrawal and return.

Available in French.

DIGITAL
MEMBER: $25
NON-MEMBER: $30

+ Audit Data Analytics Guide

Harness the power of new technologies and data analytics to support the audit of financial statements for your clients or organization.

DIGITAL
PRINT
MEMBER: $115+
NON-MEMBER: $120+

+ Audit of Third-Party Regulated Activities in a Federal Election

Develop a deeper understanding of what's required under the *Canada Elections Act* when you are reporting on a third party's expenses for electoral campaign return. This guide also contains practical auditing insights on the applicable amendments and changes to political financing.

Available in French.

DIGITAL
MEMBER: $25
NON-MEMBER: $30

+ Bank Confirmation Forms

Streamline how you prepare client materials. Use this set of helpful templates to prepare confirmation documents easily and efficiently.

Available in French.

DIGITAL
MEMBER: $25
NON-MEMBER: $30

+ Canadian Financial Reporting Collection

Your comprehensive library of the *CPA Canada Handbook* as well as financial reporting resources, including the *CPA Canada Standards and Guidance Collection* and the *Guide to International Financial Reporting Standards in Canada*.

DIGITAL
MEMBER: $585
NON-MEMBER: $640

+ Canadian Securities Reporting Advisor

A practical reference service to help you meet securities reporting and disclosure obligations for public companies. It includes coverage of Canadian securities legislation, commentary from CPA Canada and EY, compliance tools and more.

DIGITAL
$1650+

+ The CAS Proficiency Series

Jointly Presented with Grant Thornton International Ltd.

This online course series provides an easy, effective and interactive approach for you to understand and apply Canadian Auditing Standards (CAS) in your audit engagements.

Each program in this series uses design elements to encourage full comprehension and retention of the core concepts including:

a) CAS in the context of the stage of an audit
b) real-world scenarios and examples that are relevant to typical audits
c) frequent review questions (knowledge checks) and remedial feedback
d) a final assessment to determine mastery of the information

There are currently 23 programs in the series, with additional programs forthcoming that will cover the entire set of Canadian Auditing Standards.

ON DEMAND
BUNDLE: 46 CPDHOURS
INDV: 2 CPD HOURS
BUNDLED: $2000
INDV: $125
ONLINE COURSE

+ CPA Canada Guide SOC 1®: Reporting on Controls at a Service Organization and Applying CSAE 3416

This guide will help you audit a service organization's controls relevant to user entities' internal control over financial reporting, with insights on the differences between type one and type two reports, plus illustrative examples.

DIGITAL

MEMBER: $69
NON-MEMBER: $89

+ CPA Canada Handbook — Accounting

Make sure you know how to prepare financial statements in accordance with Canadian GAAP. This handbook includes the latest guidance on IFRS, ASPE, ASNPO and accounting standards for pension plans.

Available in French.

DIGITAL PRINT

$300+

+ CPA Canada Handbook — Accounting and Assurance

This handbook will help you apply best practices from the Accounting Standards Board and the Auditing and Assurance Standards Board for IFRS, ASPE, CAS, CSQC 1 and quality control for firms that perform audits and reviews of financial statements, as well as other assurance engagements.

Available in French.

DIGITAL

$565+

+ CPA Canada Handbook — Assurance

The handbook reflects the Auditing and Assurance Standards Board's adoption of ISA and CAS, with information to help you apply the same rules as the *CPA Canada Handbook – Accounting and Assurance*, plus other Canadian standards and related services guidelines.

Available in French.

PRINT

$270

+ CPA Canada Standards and Guidance Collection

This thorough resource provides you with up-to-date information on accounting and assurance standards, the implementation of IFRS, ASPE, CAS and more.

Available in French.

DIGITAL PRINT

MEMBER: $195+
NON-MEMBER: $675

+ Guide for Auditors of Registered Electoral District Associations Appointed Under the Canada Elections Act

If you're engaged to report on an electoral district, this guide will help you understand your responsibilities as auditor, with guidance on how to apply CAS and evaluate financial transactions for compliance.

Available in French.

DIGITAL

MEMBER: $25
NON-MEMBER: $30

+ Guide to Review Engagements: CSRE 2400

Get the guidance you need to review engagements that comply with CSRE 2400, featuring practical examples of typical procedures and advice on how to address difficult areas of historical financial statements.

Available in French.

DIGITAL

MEMBER: $30
NON-MEMBER: $35

+ ISA Engagement Forms

A bundle of forms, checklists and sample letters that you can customize meet the needs of individual audit, review and compilation engagements for small- and medium-sized entities (SMEs).

Available in French.

DIGITAL

MEMBER: $260
NON-MEMBER: $285

+ Professional Engagement Guide (PEG)

The latest edition with information on applying professional standards. Get practical insights on how to perform high quality, cost-effective assurance and compilation engagements for small and medium-sized entities.

Available in French.

DIGITAL

PRINT

MEMBER: $395+
NON-MEMBER: $430+

+ Professional Engagement Guide — Practice Management, Advisory, Compilations and Tax (PACT)

The most up to date resources on the new CSRS 4200 compilations as well as the existing Section 9200 compilations - Practice aids (templates, letters and reports), illustrative case studies, including detailed sample completed forms and a step-by-step guide to completing compilation engagements that address the key requirements and concepts in the professional standards.

Access various tax engagement letters, transmittal letters and T1, T2 and T3 preparation checklists as well as bookkeeping letters and checklists at the one-stop PACT Resource Centre, available through Knotia.ca.

Coming soon.

DIGITAL

MEMBER: $355
NON-MEMBER: $395

+ Professional Skepticism: The Golden Key to an Auditor's Success

In this online course, you will review over theoretical concepts and hear from fellow CPAs who provide real-life perspectives that explore the concept of professional skepticism. You will also be able to go through interactive case studies that allows participants to apply professional skepticism in a fictional setting using a "choose-your-own-adventure" format.

ON DEMAND

5 CPD HOURS

MEMBER: $349
NON-MEMBER: $385

ONLINE COURSE

+ Quality Assurance Manual

Make sure your firm complies with Canadian quality control standards (CSQC 1 and CAS 220). QAM is an ideal resource if you want to develop your own policy manuals and systems of control as well.

Available in French.

DIGITAL

MEMBER: $120
NON-MEMBER: $210

+ REALPAC ASPE Handbook

Real estate accounting can be complex. This is your one-stop source for the most up-to-date recommended accounting practices for real estate investment and development entities reporting under ASPE.

DIGITAL

MEMBER: $425
NON-MEMBER: $470

+ REALPAC IFRS Handbook

What you need to navigate the ins and outs of global real estate reporting with confidence. This in-depth guide covers the top recommended accounting practices for real estate investment and development entities when applying IFRS.

DIGITAL

MEMBER: $425
NON-MEMBER: $470

+ Review Engagements: A Sample File on the Application of CSRE 2400

This sample case study of a fictitious entity is based on an actual file completed in accordance with CSRE 2400 using PEG forms. Refer to it for practical guidance in applying the standard.

Available in French.

DIGITAL

MEMBER: $165
NON-MEMBER: $180

Corporate Governance

+ 20 Questions Directors Should Ask About Internal Audit

The complexity of audit continues to grow as businesses face new cybersecurity risks, increased regulation and other factors like economic uncertainty. Help your organization weather the evolving impact of changes in governance, risk, compliance and future value.

Available in French.

PRINT

MEMBER: $20
NON-MEMBER: $25

+ Director's Briefing: Board Oversight of Tax Risk

Risks can arise as a result of both ongoing tax planning processes and extraordinary transactions. This book will help you execute your oversight responsibilities with confidence by addressing the role of boards versus audit committees in managing tax risk.

Available in French.

PRINT

MEMBER: $20
NON-MEMBER: $25

+ Guidance for Directors: Disclosure and Certification – What's at Stake?

As a director, you face a higher risk of liability under securities class action if you misrepresent company statements or fail to make timely disclosures. This useful book sets out the key elements of a certification support process to help you ensure reliability and reduce risk.

Available in French.

PRINT

MEMBER: $20
NON-MEMBER: $25

+ IFRS — A Briefing for Chief Executives, Audit Committees and Boards of Directors

Briefing notes for CEOs, audit committee members, boards of directors and others who need a broad overview of IFRS. This collection includes easy-to-use summaries in non-technical language of IFRS requirements for annual reporting.

PRINT

MEMBER: $75
NON-MEMBER: $90

+ Overseeing Mergers and Acquisitions: A Framework for Boards of Directors

A robust framework to help you oversee successful mergers and acquisitions while maximizing shareholder value. Explore the full life cycle of M&A work, from strategy and transaction develop to implementation and post-closing activities.

Available in French.

PRINT

MEMBER: $35
NON-MEMBER: $45

+ Overseeing Strategy: A Framework for Boards of Directors

Many boards find the effective overseeing of strategy a challenging task. This practical framework can help you learn how to more effectively oversee the strategic planning process – from preparation and strategy formulation to execution and monitoring results.

Available in French.

PRINT

MEMBER: $35
NON-MEMBER: $45

Credentials

+ Certified in Financial Forensics (CFF)

Jointly presented by AICPA

Take your CPA to the next level and deepen your expertise. When you earn the CFF, you join an exclusive community of professionals in forensic accounting with considerable knowledge, skills and experience.

Earning the CFF can help you stand out from the pack in this demanding field, distinguishing your expertise for clients and employers while also providing access to valuable tools and resources in forensic and valuation so you can keep growing your career.

ROLLING

VARIABLE

$400 – $500

ONLINE AND/OR IN-PERSON

+ Certified Information Technology Professional (CITP)

Jointly presented by AICPA

Enhance your career with a specialty credential. When you earn the CITP, you'll join an esteemed network of like-minded professionals from across North America and receive access to exceptional tools and professional resources.

Becoming a CITP offers a career boost by validating your strategic skills in financial information management. It also identifies you as a trustworthy IT audit and assurance expert and could help you land new referrals in a competitive marketplace.

ROLLING

VARIABLE

$400 – $500

ONLINE AND/OR IN-PERSON

Prices subject to change

Conferences

+ The ONE National Conference

The ONE is an unforgettable experience that's all about cutting-edge content: engaging sessions, inspiring expertise, great technical workshops and unparalleled networking opportunities with over 1,000 CPAs from across Canada.

You will also be able to select the package that best suits you. Come find out what the future holds for the profession – including how to embrace innovation and keep up with the pace of change, no matter what industry you're in.

SEPT. 17–18, 2019

4–43 HOURS

STARTING AT $99

VIRTUAL CONFERENCE

cpacanada.ca/TheONE

+ Commodity Tax Symposium

Stay up to date on critical issues in policy, legislation and compliance at Canada's largest and longest-running indirect tax event.

The agenda includes great networking opportunities and a variety of in-depth technical sessions, so you can refine your skills and make the most of your time – as well as expert-led panels that focus on practical issue identification and topic analysis.

CANCELLED FOR 2020

14 HOURS

$1595

IN-PERSON OR VIRTUAL CONFERENCE

+ Public Sector Conference

If you're a senior financial professional who works in government, for a public sector organization or a not-for-profit that follows PSAB standards, this event is the place to be. It will help you keep your public finance skills current with the context-specific thought leadership, technology and accounting topics that matter most to you.

You'll also be able to connect with peers about the top challenges facing your sector and glean insights on public finance from leaders representing every level of government.

OCT. 19–21, 2020 OTTAWA, ON

20 CPD HOURS

$595

VIRTUAL CONFERENCE

cpacanada.ca/PSC

+ Oil and Gas Conference

Canada needs an agile energy sector – one that can confidently keep pace with the evolving business landscape. Explore critical issues facing the industry at this annual event for oil and gas CPAs.

You'll have the opportunity develop new technical skills, hear from experts in oil and gas finance from across the country and get fresh insights on hot industry topics, including how to improve operations and support business diversification.

NOV. 19–20, 2020

7+ HOURS

STARITNG AT $249

VIRTUAL CONFERENCE

cpacanada.ca/OilGas

Prices subject to change

+ Conference for Audit Committees

Business environments with constant disruption require skilled and diverse audit committee members. Strengthen your foresight on what's driving change globally as you learn how being on a board can make a difference.

Whether you're a seasoned committee member or looking to become a corporate director, this conference will help you navigate the latest guidance on key skills, evolving responsibility areas and risk management.

DEC. 8–9, 2020
13 HOURS
$595
VIRTUAL CONFERENCE

cpacanada.ca/AuditCommittees

+ Scientific Research and Experimental Development Symposium

Take advantage of the latest tax insights on SR&ED in Canada. This comprehensive one-day event features hands-on learning and discussion, including interactive case studies.

You'll also have a front-row seat to explore new program updates and opportunities with Canada's top SR&ED experts – a mix of experienced industry practitioners and senior representatives from the CRA.

CANCELLED FOR 2020
TBD
TBD
TBD

Ethics

+ Applied Ethics in a Professional Setting

Many individuals, corporations and other entities believe that by following the rules, they are adhering to sound ethical principles – but this isn't always the case.

Go beyond the letter of the law. In this course, you'll explore a range of ethical concepts and case studies that grapple with important theoretical ethical dilemmas and consider the most effective way to handle those situations in practice.

ON DEMAND
4 HOURS
MEMBER: $189
NON-MEMBER: $239
ONLINE COURSE

+ Corporate Social Responsibility and Ethics

Discover what defines the CSR landscape today, including what it means to be good corporate citizen and the role that ethics play in business matters across different industries.

In this course, you'll learn how to help your organization enhance accountability, consider the implications of environmental accounting and reporting, and apply other best practices in corporate governance.

ON DEMAND
4 HOURS
MEMBER: $189
NON-MEMBER: $239
ONLINE COURSE

+ Success Podcast Series — Ethics and Governance

Ethics is at the core of every CPA's professional reputation. In this special six-part podcast series, you will explore a wide range of ethical and governance issues impacting CPAs across all sectors.

ON DEMAND
2 HOURS
MEMBER: $99
NON-MEMBER: $120
PODCAST

+ Essence of Professionalism: Ethics, Rules and Standards

Adhering to a code of ethics is an important part of being a professional accountant. In this course, you will explore how ethical codes and responsibilities should be applied in your day-to-day professional activities as a CPA using practical exercises.

It also covers the tools you need to help resolve decision-making challenges and navigate public concerns about ethics in the profession.

ON DEMAND
2 HOURS
MEMBER: $249
NON-MEMBER: $299
ONLINE COURSE

+ Ethical Principles and the Accounting Profession: Code Decoded

Created to complement your real-life experiences, this course will help you improve your ability to deal with ethical situations at every stage of your career. Work through a variety of case studies and interactive exercises, then see how your answers stack up against guidance from the experts.

ON DEMAND
4 HOURS
MEMBER: $189
NON-MEMBER: $239
ONLINE COURSE

+ Ethics and Tax

An overview of ethics in the tax profession. Learn how to apply key concepts in ethics to the issues you face every day in your tax practice and hear from a wide range of tax practitioners about their experiences with ethics in tax.

You'll get an overview of ethics in the profession, including why it's essential to a successful tax practice, and review best practice models for ethical decision making.

ON DEMAND
4 HOURS
MEMBER: $289
NON-MEMBER: $335
ONLINE COURSE

+ Ethics for the Auditor

Ethics are the core foundation of what auditors bring to the general public. This course will help you develop the right knowledge and skills to maintain trust and protect the reputation of your clients or organization.

Learn why it's important to embrace ethics, and how your judgment can have a significant impact on the audit profession's values and services.

ON DEMAND
4 HOURS
$229
ONLINE COURSE

+ Ethics for the CFO

For many executives, ethical decisions can be challenging. In this course, you'll engage with hands-on case studies, theory and discuss real-life events to build ethical skills with C-suite leadership in mind.

You'll also learn why it's important for CFOs to embrace ethics in choices that have repercussions not only for yourself, but for your organization and the public as well.

ON DEMAND
4 HOURS
$229
ONLINE COURSE

Prices subject to change

+ Ethics for the Consultant

As a consultant, ethics are central to the value of your services. Make sure you have the right skills to offer sound judgment to clients and navigate potential roadblocks.

Through a blend of theory, practice and case studies based on real-life events, you'll learn how to address the most common challenges – from business deals and tax issues to performance management and professional standards.

ON DEMAND
4 HOURS
MEMBER: $255
NON-MEMBER: $310
ONLINE COURSE

PROFESSIONAL DEVELOPMENT CATALOGUE - FOR THE PRACTITIONER

Prices subject to change

Financial Reporting

+ In-Depth Brokers and Investment Dealers

The Canadian securities industry can be challenging. Equip yourself with the right knowledge and skills to navigate the important issues while providing accounting services for brokers and investment dealers.

In this comprehensive course, you will learn about the investment industry and its regulatory environment, as well as best practices in risk management, finan-cial reporting and auditing to support your clients in securities.

Note: A prerequisite module is required to ensure that you have a solid background on the business activities of the securities industry. It is included in the purchase of this course.

OCT. 26–27, 2020
TORONTO, ON

14 HOURS

$1950

VIRTUAL COURSE

+ Business Valuation

An in-depth explanation for you of the key principles, methodologies and approaches used in business valuation today, such as valuation assignments, income tax considerations, balance sheet adjustments and intangible assets.

DIGITAL

PRINT

MEMBER: $89+
NON-MEMBER: $100

+ Canadian Corporate Finance Manual

From practitioners who require a day-to-day reference source to CFOs who need a deeper understanding of the marketplace – this manual will sharpen your skills in corporate finance with real-world case studies, techniques and tips.

DIGITAL

MEMBER: $225
NON-MEMBER: $235

+ Canadian Financial Reporting Collection

Your comprehensive library of the *CPA Canada Handbook* as well as financial reporting resources, including the *CPA Canada Standards and Guidance Collection* and the *Guide to International Financial Reporting Standards in Canada*.

DIGITAL

MEMBER: $225
NON-MEMBER: $235

+ Canadian Securities Reporting Advisor

A practical reference service to help you meet securities reporting and disclosure obligations for public companies. It includes coverage of Canadian securities legislation, commentary from CPA Canada and EY, compliance tools and more.

DIGITAL

$1650+

+ CPA Canada Guide: Reporting on an Entity's Cybersecurity Risk Management Program and Controls

Learn how to protect your organization from digital threats using the System and Organization Controls (SOC) guide for cybersecurity assurance engagement, which has been adapted by CPA Canada from the AICPA version to meet Canadian standards.

DIGITAL

MEMBER: $69
NON-MEMBER: $89

+ CPA Canada Guide SOC 2®: Reporting on Controls at a Service Organization Relevant to Security, Availability, Processing Integrity, Confidentiality or Privacy

This guide will help you effectively report on controls for service organizations from a data perspective. Learn how to apply best practices in key audit areas when performing and reporting on SOC 2 engagements to ensure compliance with the appropriate standards.

DIGITAL

MEMBER: $69
NON-MEMBER: $89

+ CPA Canada Handbook — Accounting

Make sure you know how to prepare financial statements in accordance with Canadian GAAP. This handbook includes the latest guidance on IFRS, ASPE, ASNPO and accounting standards for pension plans.

Available in French.

DIGITAL

PRINT

$300+

+ CPA Canada Handbook — Accounting and Assurance

This handbook will help you apply best practices from the Accounting Standards Board and the Auditing and Assurance Standards Board for IFRS, ASPE, CAS, CSQC 1 and quality control for firms that perform audits and reviews of financial statements, as well as other assurance engagements.

Available in French.

DIGITAL

$565

+ CPA Canada Standards and Guidance Collection

This thorough resource provides you with up-to-date information on accounting and assurance standards, the implementation of IFRS, ASPE, CAS and more.

Available in French.

DIGITAL PRINT

MEMBER: $195+
NON-MEMBER: $675

+ Guide to Accounting Standards for Private Enterprises

Improve your knowledge and understanding of Part II in the *CPA Canada Handbook – Accounting*. This useful guide supports the application of ASPE in Canada.

Available in French.

DIGITAL

MEMBER: $415
NON-MEMBER: $605

+ IFRS — A Briefing for Chief Executives, Audit Committees and Boards of Directors

Briefing notes for CEOs, audit committee members, boards of directors and others who need a broad overview of IFRS. This collection includes easy-to-use summaries in non-technical language of IFRS requirements for annual reporting.

PRINT

MEMBER: $75
NON-MEMBER: $90

+ International Financial Reporting Standards

A searchable collection for you that covers the complete set of IFRS from 2017 to present. It also includes accompanying documents, such as implementation guidance, illustrative examples, draft interpretations and monthly updates when revisions or amendments arise.

DIGITAL

MEMBER: $410
NON-MEMBER: $450

+ Model Financial Statements for IFRS

Make sure you have the right resources to prepare consistent financial statements that reflect professional standards. This publication address four models applying IFRS as well as appropriate references to Part I of the *CPA Canada Handbook – Accounting*.

DIGITAL PRINT

MEMBER: $260
NON-MEMBER: $270

+ Model Financial Statements for Private Enterprises

If you prepare financial statements for private enterprises, then this is the resource for you. It covers ASPE in Part II of the *CPA Canada Handbook – Accounting* with analysis, application insights, key presentation elements and other valuable supporting material for engagements.

PRINT

MEMBER: $260
NON-MEMBER: $270

Prices subject to change

+ REALPAC ASPE Handbook

Real estate accounting can be complex. This is your one-stop source for the most up-to-date recommended accounting practices for real estate investment and development entities reporting under ASPE.

DIGITAL

MEMBER: $425
NON-MEMBER: $470

+ REALPAC Canadian REIT Handbook

It's imperative that professionals who manage real estate investment trusts be as informed as possible. This handbook will help you develop a deeper understanding of REITs – from new sources of financing to the top tax, business and legal considerations.

DIGITAL PRINT

MEMBER: $425+
NON-MEMBER: $470

+ REALPAC IFRS Handbook

What you need to navigate the ins and outs of global real estate reporting with confidence. This in-depth guide covers the top recommended accounting practices for real estate investment and development entities when applying IFRS.

DIGITAL

MEMBER: $425+
NON-MEMBER: $470

+ Selling a Private Company

Familiarize yourself with the most important challenges and opportunities that arise when selling a private company. This book also includes the Value Enhancement Framework™, a practical reference for business owners to maximize company value.

PRINT

MEMBER: $80
NON-MEMBER: $85

+ Valuation for Financial Reporting (VFR) Certificate

Enhance your knowledge and skills in the area of valuation for financial reporting by completing this two part certificate course. Part I focuses on foundational valuation principles and methodologies. You will learn about the cost, market and income approaches to valuation as well as how to select an appropriate discount rate taking into account the company's specific circumstances. Part II takes a deeper dive into more advanced topics within valuation for financial reporting such as accounting for business combinations, valuation of intangible assets and impairment testing. Throughout both parts of the course you will be able to demonstrate the application of material using knowledge checks and in-depth case studies.

Parts I and II can be taken individually, but you must complete both to earn the certificate.

ON DEMAND 16 HOURS

MEMBER: $2590
NON-MEMBER: $2995

ONLINE AND VIRTUAL CERTIFICATE

Prices subject to change

+ Shareholder Value: Measurement, Creation, Realization

Create more competitive advantage for your company. Our practical, hands-on publication offers insightful support on how you can enhance business value at each stage, from acquisition to succession.

DIGITAL

MEMBER: $55
NON-MEMBER: $70

+ Strategic Acquisitions

This practical guide to corporate acquisitions is specifically for executives, directors and advisors of public and privately held companies. Use it to develop an integrated framework that will help you increase shareholder value with practical decision-making tools and support.

PRINT

MEMBER: $145
NON-MEMBER: $150

Get more from your PD

CPA Canada has a biweekly roundup of professional development resources, offerings and news delivered straight to your inbox. Visit cpacanada.ca/MyAccount to update your preferences.

Prices subject to change

Leadership

+ Cross-Functional Collaboration to Deliver Critical Goals

One of the biggest challenges in strategic and operational planning is alignment. But when teamsdo collaborate across functional lines, your organization is more likely to achieve its most important goals.

This virtual classroom offers you strategies and tools for leadership using a cross-functional lens. It also demonstrates how the Supporting Lines model can not only improve your bottom line but increase employee engagement as well.

NOV. 25, 2020 | 3 HOURS

MEMBER: $395
NON-MEMBER: $475

VIRTUAL CLASSROOM

+ From Overwhelmed to Flourishing: Eight Steps to Thrive

Learn the eight steps it takes to thrive, including the foundations of resilience and awareness in your professional life. This webinar will equip you with practical strategies you need to better manage feeling stressed out and overwhelmed.

ON DEMAND | 1 HOUR

MEMBER: $65
NON-MEMBER: $80

WEBINAR

+ Leading Organizations From a People Perspective

When was the last time you thought about your leadership style? This online course includes activities and exercises designed to provoke both self- and organizational analysis. Learn how to build a strong organizational culture that prioritizes the importance of people as agents of change, along with results-oriented ideas and action plans.

ON DEMAND | 4 HOURS

MEMBER: $160
NON-MEMBER: $195

ONLINE COURSE

+ The Materiality of Millennials

Those born in the ‘80s and ‘90s have been shaped by forces that no generation before has experienced – including some that are quite foreign to Baby Boomer, like new technology, social media, globalism and changing family structures. So how do small and medium-sized firms unlock that potential?

In this course, you'll learn the essential skills you need to recruit, engage and retain Millennial employees. Get key insights on Millennials career progression and find out how you can apply what you've learned in your approach to leadership through sample exercises and case studies.

ON DEMAND | 3 HOURS

MEMBER: $195
NON-MEMBER: $239

ONLINE COURSE

Prices subject to change

+ Show Up Like a Coach

Coaching isn't just a skillset; it's a mindset that can make all the difference in business. Empower your team and boost performance with evidence-based insights from award-winning executive coach, Jennifer Gervès-Keen.

Available in French.

PRINT

$27.99

+ Success Podcast Series — Upholding Professional Integrity

Integrity is the core of the CPA profession. In this podcast series, explore the current trends around financial crimes and corporate misconduct, how to be prepared for them, and how to help jeopardized businesses recover.

ON DEMAND

1 HOURS

MEMBER: $49
NON-MEMBER: $59

PODCAST

+ Traits of Today's CFO: A Handbook for Excelling in an Evolving Role

Businesses need strategic people in charge of the finance function. This book will help you improve your skills as a negotiator, communicator and visionary leader. You'll also learn about the future of work for CFOs and controllers.

DIGITAL

PRINT

MEMBER: $50+
NON-MEMBER: $55+

Other

+ Babie$: The Real Story of How Much They Cost

If you're a new or expecting parent, this book will help you create a baby budget, plan parental leave, explore different childcare options and be aware of the hidden costs associated with a growing family.

DIGITAL

PRINT

MEMBER: $4+
NON-MEMBER: $5+

+ Procrastinator's Guide to Retirement: How You Can Retire in 10 Years or Less

This go-to guide for late starters will help you find your way through today's maze of retirement issues. Get a clear direction on what you need to do now to live comfortably when you retire.

Available in French.

DIGITAL

PRINT

MEMBER: $7+
NON-MEMBER: $10+

+ Protecting You and Your Money: A Guide to Avoiding Identity Theft and Fraud

Learn how to you protect yourself from financial fraud, including tips for spotting current scams, getting your life back on track after identity theft and find where to go for help and support.

Available in French.

DIGITAL

PRINT

MEMBER: $7+
NON-MEMBER: $10+

PROFESSIONAL DEVELOPMENT CATALOGUE - FOR THE PRACTITIONER

Performance Management

+ Building a Dynamic, Scenario-Based Forecast

A modern forecast needs to be dynamic and flexible, predicting multiple scenarios in both the short- and long-run. But changing a model that isn't working can be challenging without the right skill set.

Learn how to integrate scenario planning into your forecasting process and make more effective business decisions that allow for greater flexibility. In this virtual classroom, you'll get experience developing a robust rolling forecast model that brings value to your firm, using external parameters as drivers.

SEPT. 23, 2020
OCT. 22, 2020

3 HOURS

MEMBER: $395
NON-MEMBER: $475

VIRTUAL CLASSROOM

+ CPA Success Podcast Series: Leadership and Performance Measurement

In this special six-part podcast series, you'll dive into a wide range of leadership and performance management (PM) topics. Discover how critical skills in leadership and PM are for a successful career.

ON DEMAND

2 HOURS

MEMBER: $99
NON-MEMBER: $120

PODCAST

+ Better Costing, Better Operational Planning and Budgeting

Effective budgeting and operational planning are the backbone of all sustainable business models. Dig deeper into the role of both so you can improve the long-term outlook of your business.

In this virtual classroom, you'll find out what's driving the numbers and learn how to use the right tools and strategies to support better performance outcomes, including activity-based budgeting and tying plans to your organization's strategy.

SEPT. 23, 2020

3 HOURS

MEMBER: $395
NON-MEMBER: $475

VIRTUAL CLASSROOM

+ Excel Certificate

Are you ready to create functional and dynamic spreadsheets in Excel? Enhance your knowledge and skills with in-depth information on Excel formulas and functions for data analysis, spreadsheet modelling, financial analysis and more.

By the end of this ten-course program, you'll have a stronger grasp on Excel to support your work in business, accounting or finance. Learn at your own pace with support from extensive resources, ebooks and practical examples along the way.

- Introduction to Excel: Beginning the Journey to Spreadsheet Mastery
- Formulas and Functions: An Introduction to the Power of Excel
- Excel Formatting Tools: How to Add Eye-Catching Elements
- Excel Formulas and Functions: Logic and Lookups
- Excel Math and Finance Functions: Formulas for Business Decision Makers
- Excel Date and Time Functions: Theory and Application
- Excel Test and Information Functions: It's Not All About the Numbers
- Excel Tables and Tabular Data
- Introduction to Pivot Tables in Excel
- Introduction to Data Visualization: Turning Data Into Information in Excel

Courses can be taken individually as well, but you must complete all ten to earn the certificate.

ON DEMAND

29 HOURS

MEMBER: $1695
NON-MEMBER: $1995

ONLINE CERTIFICATE

+ Executing Performance Through Strategy Mapping

Take your organization's productivity to the next level by creating concrete plans that tie strategic objectives to key performance indicators.

In this course, you'll learn how to use a strategy map to achieve business objectives and successfully implement your plan. Plus, get insights on cascading goals down to the employee level and what it takes to develop a balanced scorecard.

ON DEMAND

4 HOURS

MEMBER: $279
NON-MEMBER: $335

VIDEO COURSE

+ Explaining Strategy and Understanding Innovation: The Business Model Canvas

Do you know how your business will be affected by technological, economic or social change? This course covers the advantages of using the Business Model Canvas framework as a basis for business model design. You'll learn how to properly understand and implement new strategies to prepare your company for the future.

ON DEMAND

2 HOURS

MEMBER: $169
NON-MEMBER: $210

ONLINE COURSE

+ Financial Risk Management: Fundamental Concepts

Financial risk is the probability of loss arising from adverse events in the marketplace. Find out what you need to know to protect your clients or organization based on guidelines from the Office of the Superintendent of Financial Institutions (OFSI).

This course will help you identify potential financial risks and understand which strategies you can use to mitigate them, such as foreign exchange rates, interest variables and credit.

ON DEMAND
3 HOURS
MEMBER: $219
NON-MEMBER: $255
ONLINE COURSE

+ Financial Structuring: Senior Debt

Is your company accessing current market terms for its senior debt or undergoing a period of growth or transition? Make sure you've set your business up for success with the right financial structure.

In this virtual classroom, you'll develop strategic debt structuring skills that are ready to apply in your day-to-day work. Learn how to maximize corporate value and reduce risk with a special focus on how to handle senior debt, revolving debt and long-term corporate debt.

TBD
3 HOURS
MEMBER: $395
NON-MEMBER: $475
VIRTUAL CLASSROOM

+ Foreign Exchange Risk Management

Do you know when to use forwards, futures or swaps? Many of the tools required to handle foreign exchange risk are well established, but managing it well requires technical expertise and practical knowledge.

In this flexible course, you'll study the key concepts of foreign exchange risk management. You will also learn about how you can effectively anticipate the market, identify risks and manage exposure.

ON DEMAND
6 HOURS
MEMBER: $295
NON-MEMBER: $355
ONLINE COURSE

+ In-Depth Brokers and Investment Dealers

The Canadian securities industry can be challenging. Equip yourself with the right knowledge and skills to navigate the important issues when providing accounting services for brokers and investment dealers.

In this comprehensive course, you will learn about the investment industry and its regulatory environment, as well as best practices in risk management, financial reporting and auditing to support your clients in securities.

Note: A prerequisite module is required, to ensure that you have a solid background on the business activities of the securities industry. It is included in the purchase of this course.

OCT. 26–27, 2020
VIRTUAL
14 HOURS
$1950
VIRTUAL CLASSROOM

Prices subject to change

+ Performance Management and Strategy Certificate

Performance management (PM) and strategy drive real value in finance and business. This two-part certificate program will help you implement evidence-based decisions, lead a more agile corporation and increase profitability using practical business tools like strategy maps and a balanced scorecard.

You'll also learn how apply best practices in PM to achieve clear, measurable outcomes that impact all levels of an organization through a Harvard Business School simulation. This includes the integration of core concepts like strategic positioning, cascading goals, cost management, pricing and more.

Parts I and II can be taken individually as well, but you must complete both to earn the certificate.

PART I: ON DEMAND
PART II: JUN 23, 2020
NOV. 24, 2020
DEC. 3, 2020
40 HOURS
$2890
ONLINE AND VIRTUAL CERTIFICATE

+ Pricing and Customer Profitability

Your organization can significantly increase its bottom line with a better understanding of contribution margin, pricing and customer profitability.

This course will help you get there with a high-level overview of the key ingredients required to create an effective pricing strategy. Create a roadmap to help increase your bottom line and begin your journey managing profitability and pricing.

ON DEMAND
6 HOURS
MEMBER: $449
NON-MEMBER: $499
ONLINE COURSE

+ Business Matters Newsletter

A newsletter designed to help you communicate with your clients on a regular basis, while providing them with practical information about the latest news in tax, tech, management, insurance, investments, law and more. Customize it by reproducing with your firm's letterhead.

DIGITAL
MEMBER: $325+
NON-MEMBER: $355+

+ Budgeting: Techniques and Applications

Learn about the three Ps of budgeting and what's critical to planning for success. This book will also help you problem solve for specific financial issues and build skills in forecasting for continuous improvement.

DIGITAL
PRINT
$50+

+ Business Valuation

An in-depth explanation for you of the key principles, methodologies and approaches used in business valuation today, such as valuation assignments, income tax considerations, balance sheet adjustments and intangible assets.

DIGITAL
PRINT
MEMBER: $89+
NON-MEMBER: $100+

Prices subject to change

+ Case Studies on ERM Implementation: Practical Illustrations for Launching Effective Enterprise Risk Oversight

Put yourself in the shoes of a company that's starting to formally address risk. This detailed case study provides step-by-step explanations of the process to work with the board and senior management to identify and rate significant risk categories.

DIGITAL PRINT

MEMBER: $25+
NON-MEMBER: $30+

+ Fraud Risk Management Guide

Want to reduce risk and deter fraud? Issued by the Committee of Sponsoring Organizations of the Treadway Commission (COSO), this publication lays out best practices for boards, senior management and staff at every level.

DIGITAL PRINT

MEMBER: $55+
NON-MEMBER: $70+

+ Internal Control — Integrated Framework

An in-depth explanation for you of the key principles, methodologies and approaches used in business valuation today, such as valuation assignments, income tax considerations, balance sheet adjustments and intangible assets.

DIGITAL

MEMBER: $140
NON-MEMBER: $145

+ Overseeing Mergers and Acquisitions: A Framework for Boards of Directors

A robust framework to help you oversee successful mergers and acquisitions while maximizing shareholder value. Explore the full life cycle of M&A work, from strategy and transaction develop to implementation and post-closing activities.

Available in French.

PRINT

MEMBER: $35
NON-MEMBER: $45

+ Overseeing Strategy: A Framework for Boards of Directors

Many boards find the effective overseeing of strategy a challenging task. This practical framework can help you learn how to more effectively oversee the strategic planning process – from preparation and strategy formulation to execution and monitoring results.

Available in French.

PRINT

MEMBER: $35
NON-MEMBER: $45

Prices subject to change

+ Selling a Private Company

Familiarize yourself with the most important challenges and opportunities that arise when selling a private company. This book also includes the Value Enhancement Framework™, a practical reference for business owners to maximize company value.

PRINT

MEMBER: $80
NON-MEMBER: $85

+ Shareholder Value: Measurement, Creation, Realization

Create more competitive advantage for your company. Our practical, hands-on publication offers insightful support on how you can enhance business value at each stage, from acquisition to succession.

DIGITAL

MEMBER: $55
NON-MEMBER: $70

+ Strategic Acquisitions

This practical guide to corporate acquisitions is specifically for executives, directors and advisors of public and privately held companies. Use it to develop an integrated framework that will help you increase shareholder value with practical decision-making tools and support.

PRINT

MEMBER: $145
NON-MEMBER: $150

+ Traits of Today's CFO: A Handbook for Excelling in an Evolving Role

Businesses need strategic people in charge of the finance function. This book will help you improve your skills as a negotiator, communicator and visionary leader. You'll also learn about the future of work for CFOs and controllers.

DIGITAL PRINT

MEMBER: $50+
NON-MEMBER: $55+

Prices subject to change

Risk Management and Internal Control

+ 20 Questions Directors Should Ask About Internal Audit

The complexity of audit continues to grow as businesses face new cybersecurity risks, increased regulation and other factors like economic uncertainty. Help your organization weather the evolving impact of changes in governance, risk, compliance and future value.

Available in French.

PRINT

MEMBER: $20+
NON-MEMBER: $25+

+ Case Studies on ERM Implementation: Practical Illustrations for Launching Effective Enterprise Risk Oversight

Put yourself in the shoes of a company that's starting to formally address risk. This detailed case study provides step-by-step explanations of the process to work with the board and senior management to identify and rate significant risk categories.

DIGITAL

PRINT

MEMBER: $25+
NON-MEMBER: $30+

+ Fraud Risk Management Guide

Want to reduce risk and deter fraud? Issued by the Committee of Sponsoring Organizations of the Treadway Commission (COSO), this publication lays out best practices for boards, senior management and staff at every level.

DIGITAL

PRINT

MEMBER: $55
NON-MEMBER: $70

+ Guidance for Directors: Disclosure and Certification — What's at Stake?

As a director, you face a higher risk of liability under securities class action if you misrepresent company statements or fail to make timely disclosures. This useful book sets out the key elements of a certification support process to help you ensure reliability and reduce risk.

Available in French.

PRINT

MEMBER: $20+
NON-MEMBER: $25+

+ Internal Control — Integrated Framework

An in-depth explanation for you of the key principles, methodologies and approaches used in business valuation today, such as valuation assignments, income tax considerations, balance sheet adjustments and intangible assets.

DIGITAL

MEMBER: $140
NON-MEMBER: $145

Prices subject to change

Sustainability

+ Corporate Social Responsibility and Ethics

Discover what defines the CSR landscape today, including what it means to be good corporate citizen and the role that ethics play in business matters across different industries.

In this course, you'll learn how to help your organization enhance accountability, consider the implications of environmental accounting and reporting, and apply other best practices in corporate governance.

ON DEMAND

4 HOURS

MEMBER: $189
NON-MEMBER: $239

ONLINE COURSE

+ Finding Success Through Resilience and Adaptability: Contemporary Matters

Resilience – the ability to react and adapt – is key to business success. Learn more about what trends are relevant to the world of business and accounting in this four-part video series where the experts weigh in on integrating reporting, capital expenditures, climate disclosures and natural capital.

ON DEMAND

1 HOUR

$59 TO $175

VIDEO SERIES

+ Practical Aspects of Business Valuation

Expand your accounting skills by learning how to conduct simple, informal business valuations for your clients. This self-paced online course covers the key principles and practices of business valuation in a Canadian context.

You will learn about core valuation theory as well as the practical fundamentals of performing custom business valuations that consider a company's industry as well as its unique characteristics and circumstances.

ON DEMAND

8 HOURS

MEMBER: $349
NON-MEMBER: $399

ONLINE COURSE

Prices subject to change

Tax

+ Accounting for Income Taxes

Learn the fundamentals of accounting for income taxes in Canada under both IFRS and ASPE. This introductory course covers the key concepts of accounting for income taxes, including recognition, measurement, valuation, presentation and disclosure.

You'll build skills in accounting methodology for income tax and finish with a stronger grasp on issues like deferred tax and GAAP measures for Canadian entities.

ON DEMAND
20 HOURS
MEMBER: $795
NON-MEMBER: $895
ONLINE COURSE

+ Ethics and Tax

An overview of ethics in the tax profession. Learn how to apply key concepts in ethics to the issues you face every day in your tax practice and hear from a wide range of tax practitioners about their experiences with ethics in tax.

You'll get an overview of ethics in the profession, including why it's essential to a successful tax practice, and review best practice models for ethical decision making.

ON DEMAND
4 HOURS
MEMBER: $289
NON-MEMBER: $335
ONLINE COURSE

+ GST/HST Course

With this course, you'll get a broad overview of GST/HST-related topics, including useful tips on how to resolve common problems. Take time to develop your knowledge about major indirect tax issues, starting with the basics and moving toward more technical subjects.

You'll also have the chance to review recent developments in GST/HST and how they may impact your clients, like place of supply rules, import/exports, ITC claims and more.

ON DEMAND
12 HOURS
MEMBER: $475
NON-MEMBER: $525
ONLINE COURSE

+ Income Tax for the General Practitioner

This comprehensive course provides an overview of the foundational elements, and highlights critical issues, in current tax legislation that general practitioners commonly encounter and need to know.

In it, you'll gain a better appreciation of strategic tax planning techniques and improve your ability to identify relevant tax issues, from trusts to estate planning, property income, personal tax planning and more. You'll also learn about the CRA's most current administrative practices and positions.

Note: Some advance online study and reading may be required. Additional in-residence and facility fees apply.

CANCELLED FOR 2020
44 HOURS
MEMBER: $3295
NON-MEMBER: $3395
IN-PERSON COURSE

Prices subject to change

+ In-Depth Corporate Reorganizations

Building on corporate reorganization concepts introduced in the In-Depth Tax Program, this course covers the most recent amendments, issues and strategies for corporate reorganizations.

In this course, you will dive into detailed, technical tax rules and learn how to identify new tax planning opportunities for your clients or organization. You'll also explore the most effective methods for handling corporate purchases, sales and restructuring.

Note: Some advance online study and reading is required.

Prerequisite: Completion of the In-Depth Tax Program and two or more years of work experience in tax full-time work experience in tax. Some admissions may be made by special request. Additional in-residence and facility fees apply.

CANCELLED FOR 2020
25 HOURS
$3495
IN-PERSON COURSE

+ In-Depth GST/HST

This comprehensive course delivers the in-depth foundational GST/HST training you need to succeed. Build a strong foundation of knowledge to create value-added benefits when advising about GST/HST.

You'll learn about the current indirect tax landscape across different sectors, along with policy, compliance and regulatory considerations. You'll also have the chance to address research techniques, special rules, input tax credits, inbound supplies, non-resident issues and more.

Note: Some advance online study and reading is required.

MAY 30 – JUN. 4, 2021
NIAGARA-ON-THE-LAKE, ON
34 HOURS
$3195
PLUS FACILITY FEE
IN-PERSON COURSE

Prices subject to change

+ In-Depth International Tax

Expanding on the international tax concepts covered in the In-Depth Tax Program, this course covers the top issues surrounding the taxation of foreign operations.

You'll learn about the most effective planning strategies to minimize tax as it applies to businesses that either are expanding, or are considering expansion, outside of Canada. Plus, get advice from the experts on how to navigate foreign affiliate financing, inbound taxation, active business rules and foreign accrual property income.

Note: Some advance online study and reading is required.

Prerequisite: Completion of the In-Depth Tax Program and two or more years of full-time work experience in tax. Some admissions may be made by special request. Additional in-residence and facility fees apply.

CANCELLED FOR 2020

25 HOURS

$3495

IN-PERSON COURSE

+ In-Depth Tax Issues for the Owner-Managed Business

Take what you learned about in the In-Depth Tax Program to the next level. This course is designed for tax professionals who work predominantly with owner-managed businesses, as well as those in industry who want to expand their knowledge.

Get practical solutions to help you navigate the intricate financial situations facing business owners today, including how to handle owner-manager renumeration and plan effectively for insurance, business succession, retirement and post-mortem taxation.

Note: Some advance online study and reading may be required.

Prerequisite: Completion of the In-Depth Tax Program and two or more years of full-time work experience in tax. Some admissions may be made by special request. Additional in-residence and facility fees apply.

CANCELLED FOR 2020

25 HOURS

$3495

IN-PERSON COURSE

+ In-Depth Tax Program

The most comprehensive, practical and relevant income tax training in Canada. Build a strong foundation of the fundamental tax knowledge you need to succeed as a tax professional. It's an essential step for professional accountants seeking senior tax positions in advisory firms and corporate Canada.

This three-year program features an overview of the current Canadian tax landscape, covering more than 60 essential tax topics. It includes online learning, in-person group sessions and three seven-day residencies. The curriculum blends theory and on-the-job experience, including new technologies and an updated format to enrich your educational experience.

Note: This program requires that you have access to sufficient mentoring from a senior tax professional.

Requirements: You must be employed full-time in a tax role and spend at least 70 per cent of your time working on income tax matters. You must also be one of the following to qualify: a CPA; a lawyer called to the Canadian Bar; a CPA student or articling at a Canadian law firm; a university graduate.

STARTING FALL 2020 MULTIPLE LOCATIONS

UP TO 185HRS/YEAR

MORE INFO ONLINE

IN-PERSON AND ONLINE LEARNING

+ Introduction to the Canadian *Income Tax Act*

The *Income Tax Act* is an essential reference point for all tax practitioners in Canada – whether you're a beginner or more experienced, and as a generalist or a specialist. Learn how to read and decode provisions as you deepen your understanding of this backbone piece of legislation.

ON DEMAND

1 HOUR

MEMBER: $59
NON-MEMBER: $75

ONLINE COURSE

+ Introduction to Transfer Pricing

Cover the core principles of Canadian transfer pricing and learn how to navigate the most relevant issues facing international businesses today.

With the latest guidance from the OECD and federal legislation, this course will help you understand the role of your organization and how its fits into the current transfer pricing landscape. You'll also build a solid foundation of knowledge in key areas, including core methodology, transactional profits and comparability analysis.

ON DEMAND

12 HOURS

MEMBER: $765
NON-MEMBER: $895

ONLINE COURSE

+ Overview of Canadian Tax and Law

If you are providing guidance to clients on income tax matters, Canada's tax and legal systems have critical touch points you need to keep top of mind. This course provides an overview of both systems.

Your learning will be divided into two sections. The tax section explains the objectives and the structure of the Canadian tax system, outlining sources of income, allowable deductions and the general scheme for determining income for tax purposes. The law section will bring you up to speed on the tools and concepts you need in commercial transactions and contract law.

ON DEMAND
15 HOURS
MEMBER: $595
NON-MEMBER: $655
ONLINE COURSE

+ Safe Income and Safe Income on Hand

Explore the fundamentals of safe income and safe income on hand for Canadian corporations. This course will help you stay on top of the most recent legislative changes to the *Income Tax Act*.

You'll also learn about other key pieces of information you need to know as a tax professional, including how to calculate safe income, what the exceptions are, capital gains stripping and allocating safe income to various share classes.

ON DEMAND
14 HOURS
MEMBER: $595
NON-MEMBER: $695
ONLINE COURSE

+ Scientific Research and Experimental Development (SRED) Fundamentals

This course provides an overview of the federal and provincial SR&ED programs, expenditure categories and compliance requirements.

You'll learn about SR&ED deductions and investment tax credits, qualifying expenditures, audit review process and court cases.

ON DEMAND
12 HOURS
MEMBER: $595
NON-MEMBER: $695
ONLINE COURSE

+ Specialized GST/HST: Cross-Border Transactions

This course is a must for tax professionals who deal with cross-border activities. Dive into the complex GST/HST areas of non-residents and cross-border transactions.

You'll learn about sector-specific issues in ecommerce and financial services, like how to avoid or recover tax, applying drop shipment rules, and other reporting and compliance obligations.

ON DEMAND
12 HOURS
MEMBER: $765
NON-MEMBER: $895
ONLINE COURSE

Prices subject to change

+ Specialized GST/HST: Financial Services

Examine the dynamic indirect tax concepts and complex legislation that apply to financial institutions, services and pensions. This course is an ideal opportunity to expand your learning from the In-Depth GST/HST Course while building on practical experiences from your day-to-day financial work.

Be prepared to explore the latest changes in this important area of GST/HST. You will learn about compliance for financial institutions, input tax credits, special rules for seizures and repossessions, pension plans, cross-border assessment and more.

CANCELLED FOR 2020
15 HOURS
MEMBER: $995
NON-MEMBER :$1195
TBD

+ Specialized GST/HST: Public Sector Bodies

Do you work for or advise a public sector body? Charities, educational institutions, healthcare organizations, government agencies and not-for-profit organizations can face unique GST/HST issues.

Learn the underlying concepts and best strategies you need to handle GST/HST in this sector, including compliance, filing returns, tax credits and rebates, what exemptions apply under Schedule V of the *Excise Tax Act* and other special situations that are unique to public sector bodies.

ON DEMAND
12 HOURS
MEMBER: $765
NON-MEMBER: $895
ONLINE COURSE

+ Specialized GST/HST: Real Property

Real property transactions are usually taxable, however there are a number of special situations with exceptions to the rule.

In this specialized course, you will focus on how the most current GST/HST rules apply to residential and commercial properties, the sale of land and rebates. Enhance your technical tax knowledge and learn valuable strategies you can successfully apply to real client situations.

ON DEMAND
10 HOURS
MEMBER: $475
NON-MEMBER: $525
ONLINE COURSE

+ U.S. Corporate Tax for the Canadian Practitioner

This course is designed for Canadian practitioners who advise corporations that operate in the U.S. that may be subject to U.S. taxation. Make sure you understand the core concepts and critical American tax issues you need to know when dealing with client transactions south of the border.

You'll learn about the U.S. corporate tax system, including state and local taxes, how to calculate federal income tax and key elements of tax administration and reporting.

ON DEMAND
10 HOURS
MEMBER: $475
NON-MEMBER: $525
ONLINE COURSE

Prices subject to change

+ U.S. Personal Tax for the Canadian Practitioner

Build your knowledge and skills in U.S. person income tax, including how to determine residency status, filing requirements for U.S. tax returns and key considerations for Canadians in the U.S. as well as U.S. citizens in Canada. You'll also learn how to minimize double taxation and determine estate and gift taxes.

ON DEMAND

8 HOURS

MEMBER: $349
NON-MEMBER: $399

ONLINE COURSE

+ Canadian Tax Principles

With 700+ pages of reliable information, Byrd and Chen's book is the industry standard for general practitioners. Resolve tax issues with confidence and get straightforward answers to all of your personal and corporate tax questions.

DIGITAL

PRINT

MEMBER: $105
NON-MEMBER: $125

+ Collection APFF

This collection includes texts published by the Tax and Financial Planning Association on income tax, indirect tax, financial planning, retirement and succession. It covers annual congresses, symposia, strategy, budget analysis and more from 1991 to present.

Available in French.

DIGITAL

$1871+

+ Commodity Tax News

Stay on top of the latest developments in GST/HST, provincial sales taxes, and customs and trade issues. This subscription also includes access to Case Corner, which summarizes recent commodity tax decisions, and What's New, which lists recent government releases.

DIGITAL

MEMBER: $255
NON-MEMBER: $280

+ Couzin Taylor's Guide to Canadian Income Tax Administration

An accessible look at administrative practices of Canada's *Income Tax Act*, covering major topics such as: tax returns; interest; assessments and audits; disclosures and requests for information; objections and appeals; the trial process; and dispute resolution.

DIGITAL

MEMBER: $40
NON-MEMBER: $45

Prices subject to change

+ Customs Automated Reference Library

Your comprehensive searchable library for customs tax information. Use it to quickly classify goods, look up duty rates, establish correct value for duty and determine the origin of imported goods.

Custom options available: CARL and CARL Plus.

Available in French.

DIGITAL

MEMBER: $1665
NON-MEMBER: $1835+

+ Customs Tariff

A subscription that will help you familiarize yourself with the most up-to-date customs tariff regulations and law. It includes coverage on current provisions, earlier versions and other important information with full search functionality.

Available in French.

DIGITAL

MEMBER: $360
NON-MEMBER: $400

+ Director's Briefing: Board Oversight of Tax Risk

Risks can arise as a result of both ongoing tax planning processes and extraordinary transactions. This book will help you execute your oversight responsibilities with confidence by addressing the role of boards versus audit committees in managing tax risk.

Available in French.

PRINT

MEMBER: $20
NON-MEMBER: $25

+ Excise Automated Reference Library

Have all the key excise tax info on hand that you need with this premier GST/HST reference library. EARL includes coverage of important legislation such as the Excise Tax Act plus other GST/HST regulations, case law and CRA rulings, bulletins, forms and guides.

Custom options available: EARL and EARL Lite.

Available in French.

DIGITAL

MEMBER: $1395
NON-MEMBER: $1465

Prices subject to change

PROFESSIONAL DEVELOPMENT CATALOGUE - FOR THE PRACTITIONER

+ EY's Complete Guide to GST/HST

Canada's leading resource on GST/HST commentary and legislation, as well as a GST-QST comparison. This comprehensive guide is written in plain language by a team of EY indirect tax professionals.

DIGITAL PRINT

$109+

+ EY's Federal Income Tax Act

Everything you need to navigate Canadian income tax. Take charge with this comprehensive guide and streamline your work thanks to interactive online features, purpose notes and other reference materials.

DIGITAL PRINT

$159.50

+ EY's Guide to Canada's Foreign Affiliate Taxation Rules

Boost your knowledge on the key components of Canadian tax law and all related compliance issues for investments in foreign affiliates. You won't miss a step thanks to plenty of detailed examples and a searchable database.

DIGITAL PRINT

MEMBER: TBD
NON-MEMBER: $299+

+ EY's Guide to Capital Cost Allowance

Explore the capital cost allowance and eligible expenditure rules that determine income tax treatment for capital assets and outlays. This handy book also includes cross-references to legislation, case law and administrative materials, plus CCA lookup tables.

DIGITAL

$89

+ EY's Guide to Income Tax

Clear and authoritative guidance you can count on, written in plain language by EY tax professionals. This guide reflects both current and proposed tax legislation in Canada, which is available on its own or as a part of the Federal Income Tax Act Collection.

DIGITAL

MEMBER: $1355
NON-MEMBER: $1480

+ EY's Guide to Preparing Personal Tax Returns

With this line-by-line guide, you'll have everything you need. Save time and increase productivity during the busy tax season with clear commentary, practical examples and helpful tools, all right at your fingertips.

DIGITAL

MEMBER: $175
NON-MEMBER: $190

Prices subject to change

+ EY's Guide to Scientific Research and Experimental Development

Interested in Canada's SR&ED program? Learn how to file successful SR&ED claims for your firm with this handy resource that covers tax benefits and new legislation, along with the latest CRA rules governing SR&ED expenditures and tax credits.

DIGITAL

$89

+ EY's Guide to Tax Research and Writing

Learn what goes into the tax research process, including how laws are enacted and how to best communicate your findings to clients. Written for you by accountants, lawyers, and other professionals who have a basic familiarity with the concepts and principles of Canadian income tax.

DIGITAL

$39.50

+ EY's Guide to the Taxation of Mining Operations

If you work in the Canadian mining industry, this comprehensive reference guide will help you interpret and apply the appropriate rulings and case law under the *Income Tax Act* and your provincial or territorial legislation.

DIGITAL

$89

+ Federal Budget Commentary

This in-depth and professional guide is written annually by a dedicated team of the country's leading tax specialists. Whether you work in public practice or industry, it's an excellent resource to understand the implications of new budgetary measures.

Available in French.

DIGITAL

$250

+ Federal Income Tax Act Collection

Your ultimate federal income tax collection. FITAC combines a valuable package of reference materials with in-depth tax commentary and case law; CRA forms, publications and rulings; explanatory notes and legislative overview plus tax newsletters delivered straight to your inbox.

Custom options available: FITAC Lite, Platinum, Plus and Premium.

Available in French.

DIGITAL

MEMBER: $1090+
NON-MEMBER: $1190+

Prices subject to change

+ Financial Executive Tax Collection

Stay current on legal changes that could impact compliance and cash flow at your company. Use this collection to keep track of the latest income tax developments when overseeing accounting for income taxes, including quarterly and annual tax provisions.

Available in French.

DIGITAL

MEMBER: $1055+
NON-MEMBER: $1100+

+ FST and Excise Tax Cases/RISE

A handy reference that addresses excise tax cases from 1930 to present day, along with rulings, memoranda and other information for the former federal sales tax.

DIGITAL

MEMBER: $710
NON-MEMBER: $820

+ Knotia News

Stay current on all the latest tax developments with customized email alerts that give you what you need, when you need it. This includes commentary from EY tax professionals, as well as relevant releases from Canada Revenue Agency, the Department of Finance and Canadian court rulings.

Custom options available: Choose one topic to receive information about or bundle several options together, it's up to you.

CUSTOMS AND TRADE

EMAIL ALERT

MEMBER: $155+
NON-MEMBER: $180+

FEDERAL INCOME TAX

EMAIL ALERT

MEMBER: $265+
NON-MEMBER: $280+

GST/HST & EXCISE

EMAIL ALERT

MEMBER: $175+
NON-MEMBER: $180+

PROVINCIAL TAXES

EMAIL ALERT

MEMBER: $175+
NON-MEMBER: $180+

+ Personal Automobile Log

Looking for ways to grow your practice this year? Updated to reflect revised CRA administrative policy, this book is an ideal resource to share with clients who own or lease a car for business purposes. It'll help them keep more accurate records to support auto expense claims.

Available in French.

PRINT

MEMBER: $150+
NON-MEMBER: $160+

+ Personal Financial Planner's Manual

Create a successful financial plan with all the important facts, figures and information you need in one place. Quarterly updates to the manual will also help you stay up-to-date on the latest changes in this rapidly growing field.

DIGITAL

$295

+ Personal Tax Planner Guide 2020–2021

Help lead clients in the right direction and promote your firm's services. This tool offers easy-to-understand advice on the latest tax planning strategies – from investments to personal deductions and more.

PRINT

MEMBER: $220+
NON-MEMBER: $230+

+ Professional Accountant's Reference Service

Find everything you need, all in one place. A PARS subscription comes with some of our most popular titles, including the complete C*PA Canada Standards and Guidance Collection*, the *Federal Income Tax Collection Lite* and *EY's Complete Guide to GST/HST*.

Custom options available: PARS and PARS Plus.

DIGITAL

MEMBER: $1180
NON-MEMBER: $1620

+ Provincial Taxes

Canada's most up-to-date source on provincial tax. This subscription includes commentary and analysis; statutes and regulations; forms and guides; comparative tables; and other tax rate reference tools. You'll also receive related tax newsletters delivered straight to your inbox.

Custom options available: Ontario, Quebec, Atlantic, Western Provinces.

Available in French.

DIGITAL

MEMBER: $760
NON-MEMBER: $795

PROFESSIONAL DEVELOPMENT CATALOGUE - FOR THE PRACTITIONER

+ Provincial Taxes Electronic Reference Library

Looking for a reliable roundup of provincial tax materials? This resource includes commentary, analysis and tools for key areas - from income to fuel, sales, tobacco and more. PERL also allows you to compare the tax rates and treatment of similar items by jurisdiction.

DIGITAL

MEMBER: $1725
NON-MEMBER: $1815

+ Tax Matters @ EY

A monthly bulletin for you that presents a summary of the most recent news, case developments, publications and upcoming presentations about income tax.

DIGITAL

FREE

+ Tax Risk Management Guide

With 22 chapters of valuable guidance and great time-saving practice aids, the TRMG will help you stay ahead of the curve. Use it to better manage risk, avoid common pitfalls and improve the effectiveness of your practice.

DIGITAL

MEMBER: $210
NON-MEMBER: $230

+ Tax Suite

Whether you're looking for insights on common tax issues, line-by-line references or new tips to better manage risk, Tax Suite can help you solve more tax problems. Access it 24/7 thanks to Knotia's reliable, always-online database.

Custom options available: Ontario, Quebec, East, West and Premium.

Available in French.

DIGITAL

MEMBER: $1430+
NON-MEMBER: $2445+

+ REALPAC Canadian REIT Handbook

It's imperative that professionals who manage real estate investment trusts be as informed as possible. This handbook will help you develop a deeper understanding of REITs – from new sources of financing to the top tax, business and legal considerations.

DIGITAL

MEMBER: $425
NON-MEMBER: $470

Prices subject to change

Technology

+ National Technology Forum

Gain a better understanding of how innovative emerging resources, tools and trends across the tech landscape will impact your business. This event covers everything from big data and artificial intelligence to cloud computing, blockchain, new enterprise resource planning platforms and more.

You will have the opportunity to learn from high profile keynotes in the tech world, get practical guidance on the latest tech solutions and feature comparisons, plus attend interactive roundtables and workshops that support strong performance outcomes.

JAN. 11-12, 2021

20 HOURS

STARTING AT $495

VIRTUAL CONFERENCE

cpacanada.ca/techforum

+ Cybersecurity Frameworks Certificate

Growing concerns about cybersecurity are changing how companies in every industry approach risk management. In this two-course certificate program, you will learn how to protect your organization's data and become a strategic advisor on cybersecurity issues.

The first course focuses on the essentials of IT security and threats, while the second offers practical insights on how to select the right security framework for your business.

Courses can be taken individually as well, but you must complete both to earn the certificate.

ON DEMAND

10 HOURS

$498

ONLINE CERTIFICATE

+ Excel Certificate

Are you ready to create functional and dynamic spreadsheets in Excel? Enhance your knowledge and skills with in-depth information on Excel formulas and functions for data analysis, spreadsheet modelling, financial analysis and more.

By the end of this ten-course program, you'll have a stronger grasp on Excel to support your work in business, accounting or finance. Learn at your own pace with support from extensive resources, ebooks and practical examples along the way.

- Introduction to Excel: Beginning the Journey to Spreadsheet Mastery
- Formulas and Functions: An Introduction to the Power of Excel
- Excel Formatting Tools: How to Add Eye-Catching Elements
- Excel Formulas and Functions: Logic and Lookups
- Excel Math and Finance Functions: Formulas for Business Decision Makers
- Excel Date and Time Functions: Theory and Application
- Excel Test and Information Functions: It's Not All About the Numbers
- Excel Tables and Tabular Data
- Introduction to Pivot Tables in Excel
- Introduction to Data Visualization: Turning Data Into Information in Excel

Courses can be taken individually as well, but you must complete all ten to earn the certificate.

ON DEMAND

33 HOURS

MEMBER: $2995
NON-MEMBER: $3595

ONLINE CERTIFICATE

Prices subject to change

+ Staying Ahead of the Disruption Curve: Technology Solutions 2018 Podcast Series

How does technology affect the way CPAs make business decisions? This special series recaps discussions from the National Technology Forum. Listen to industry experts discuss the intricacies of emerging technology, enterprise resource planning implementation and cybersecurity.

ON DEMAND
2 HOURS
MEMBER: $99
NON-MEMBER: $120
PODCAST

+ Technology Issues Facing CPAs

Stay on top of the latest issues in cybersecurity, big data, analytics, artificial intelligence, block-chain and cloud computing. This webinar will give you a high-level overview, with profession-als weighing in on how these tech developments are having a profound effect on businesses and CPAs.

ON DEMAND
1 HOUR
MEMBER: $59
NON-MEMBER: $75
WEBINAR

+ Business Matters Newsletter

A newsletter designed to help you communicate with your clients on a regular basis, while providing them with practical information about the latest news in tax, tech, management, insurance, investments, law and more. Customize it by reproducing with your firm's letterhead.

DIGITAL
MEMBER: $325+
NON-MEMBER: $355+

+ CPA Canada Guide: Reporting on an Entity's Cybersecurity Risk Management Program and Controls

Learn how to protect your organization from digital threats using the System and Organization Controls (SOC) guide for cybersecurity assurance engagement, which has been adapted by CPA Canada from the AICPA version to meet Canadian standards.

DIGITAL
MEMBER: $69
NON-MEMBER: $89

Public Sector

Table of Contents

PROFESSIONAL DEVELOPMENT CATALOGUE – FOR THE PUBLIC SECTOR

PROFESSIONAL DEVELOPMENT CATALOGUE – FOR THE PUBLIC SECTOR

Audit

+ A Guide for the Auditor of a Candidate in a Federal Election

Learn about the significant reporting requirements you'll need to address when auditing electoral campaign returns for federal candidates. This covers specific responsibilities under the *Canada Elections Act*, from contributions and expenses to withdrawal and return.

Available in French.

DIGITAL

MEMBER: $25
NON-MEMBER: $30

+ Audit of Third-Party Regulated Activities in a Federal Election

Develop a deeper understanding of what's required under the Canada Elections Act when you are reporting on a third party's expenses for electoral campaign return. This guide also contains practical auditing insights on the applicable amendments and changes to political financing.

Available in French.

DIGITAL

MEMBER: $25
NON-MEMBER: $30

+ CPA Canada Standards and Guidance Collection

This thorough resource provides you with up-to-date information on accounting and assurance standards, the implementation of IFRS, ASPE, CAS and more.

Available in French.

DIGITAL PRINT

MEMBER: $195+
NON-MEMBER: $675

+ Guide for Auditors of Registered Electoral District Associations Appointed Under the Canada Elections Act

If you're engaged to report on an electoral district, this guide will help you understand your responsibilities as auditor, with guidance on how to apply CAS and evaluate financial transactions for compliance.

Available in French.

DIGITAL

MEMBER: $25
NON-MEMBER: $30

Conferences

+ AICPA Forensic and Valuation Services Conference

CERTIFIED IN FINANCIAL FORENSICS (CFF)

JOINTLY PRESENTED BY AICPA

Get timely updates, cutting-edge information on new technology, and quality networking with other forensic accounting and valuation professionals. Put your finger on the pulse of change and optimize your strategy.

NOV, 9–11, 2020 UP TO 12 HOURS

STARTING AT $1295 USD IN-PERSON OR VIRTUAL CONFERENCE

+ Public Sector Conference

If you're a senior financial professional who works in government, for a public sector organization or a not-for-profit that follows PSAB standards, this event is the place to be. It will help you keep your public finance skills current with the context-specific thought leadership, technology and accounting topics that matter most to you.

You'll also be able to connect with peers about the top challenges facing your sector and glean insights on public finance from leaders representing every level of government.

OCT. 19–21, 2020 OTTAWA, ON 20 CPD HOURS

$595 VIRTUAL CONFERENCE

cpacanada.ca/PSC

+ The ONE National Conference

The ONE is an unforgettable experience that's all about cutting-edge content: engaging sessions, inspiring expertise, great technical workshops and unparalleled networking opportunities with over 1,000 CPAs from across Canada.

You will also have the choice of five learning streams available in English and French.
Come find out what the future holds for the profession – including how to embrace innovation and keep up with the pace of change, no matter what industry you're in.

SEPT. 17–18, 2019 4–43 HOURS

STARTING AT $99 VIRTUAL CONFERENCE

cpacanada.ca/TheONE

+ Commodity Tax Symposium

Stay up to date on critical issues in policy, legislation and compliance at Canada's largest and longest-running indirect tax event.

The agenda includes great networking opportunities and a variety of in-depth technical sessions, so you can refine your skills and make the most of your time – as well as expert-led panels that focus on practical issue identification and topic analysis.

CANCELLED FOR 2020 TBD

TBD IN-PERSON OR VIRTUAL CONFERENCE

+ Scientific Research and Experimental Development Symposium

Take advantage of the latest tax insights on SR&ED in Canada. This comprehensive one-day event features hands-on learning and discussion, including interactive case studies. You will learn how to effectively resolve disputes, accelerate through the SR&ED cycle and file more successful claims.

You'll also have a front-row seat to explore new program updates and opportunities with Canada's top SR&ED experts – a mix of experienced industry practitioners and senior representatives from the CRA.

CANCELLED FOR 2020

TBD

TBD

TBD

Credentials

+ Certified in Financial Forensics (CFF)

JOINTLY PRESENTED BY AICPA

Take your CPA to the next level and deepen your expertise. When you earn the CFF, you join an exclusive community of professionals in forensic accounting with considerable knowledge, skills and experience.

Earning the CFF can help you stand out from the pack in this demanding field, distinguishing your expertise for clients and employers while also providing access to valuable tools and resources in forensic and valuation so you can keep growing your career.

ROLLING

VARIABLE

$400 – $500

ONLINE AND/OR IN-PERSON

+ Certified Information Technology Professional (CITP)

JOINTLY PRESENTED BY AICPA

Enhance your career with a specialty credential. When you earn the CITP, you'll join an esteemed network of like-minded professionals from across North America and receive access to exceptional tools and professional resources.

Becoming a CITP offers a career boost by validating your strategic skills in financial information management. It also identifies you as a trustworthy IT audit and assurance expert and could help you land new referrals in a competitive marketplace.

ROLLING

VARIABLE

$400 – $500

ONLINE AND/OR IN-PERSON

Ethics

+ CPA Success Podcast Series: Ethics and Governance

Ethics is at the core of every CPA's professional reputation. In this special six-part podcast series, you will explore a wide range of ethical and governance issues impacting CPAs across all sectors.

ON DEMAND
2 HOURS
MEMBER: $99
NON-MEMBER: $120
PODCAST

+ Ethics for the Public Sector

You're continuously making decisions about how to uphold public trust – so it's important to make sure you're asking yourself the right questions. What is expected of me? What's right or wrong in this situation, and why?

This course, developed in partnership with The Financial Management Institute (fmi*igf), will help you strengthen your ethical reasoning skills. Learn how to implement best practices in governance, reinforce positive ethics for a constructive workplace culture, and effectively handle wrongdoing with accountability and transparency.

ON DEMAND
4 HOURS
$229
ONLINE COURSE

Get more from your PD

CPA Canada has a biweekly roundup of professional development resources, offerings and news delivered straight to your inbox. Visit cpacanada.ca/MyAccount to update your preferences.

Prices subject to change

Financial Reporting

+ Public Sector Certificate

Increase your knowledge of public sector finance and explore how to make the most strategic use of government resources to create public value. In this three-part program, you'll benefit from a curriculum that bridges theory and practice for real-life applications.

Level I lays the foundation for financial decision making in a public sector context. Level II builds on the content above to give you more in-depth coverage and additional advanced topics. And finally, during the capstone, you'll collaborate with other participants in real-time applied learning activities and interactive case studies.

Topics for level I, II and the capstone include:

- Public sector accounting
- Governance and decision-making
- Financial management
- Operating and capital budgets
- Public sector auditing
- Leadership development
- Risk management
- Ethics and accountability
- Strategic planning and sustainability
- Other emerging issues

Each level of the program can be taken individually as well, but you must complete both as well as the capstone to earn the certificate.

LEVEL I AND II: ON DEMAND
CAPSTONE: DEC 1–2, 2020
84 HOURS
$4995
ONLINE AND VIRTUAL CERTIFICATE

+ Public Sector Financial Reporting and Accounting

Effective financial reporting is critical to the success of every organization. This is especially true in the public sector, where organizations face an even greater need for transparency and the ability to report on results.

Build your skills in public sector financial accounting and reporting with this course, which draws on content from the *CPA Canada Public Sector Accounting Handbook* and the *CPA Canada Handbook – Accounting.*

You'll learn how the PSAB sets standards and Canadian GAAP, the ways that reporting for the public sector differs from business and industry, as well as how to create financial statements. You'll also boost your expertise in other key areas of practice, like revenue, tangible capital assets, employee future benefits and consolidation.

Note: This course has content overlap with the Public Sector Certificate. If you're currently enrolled in that program, we don't recommend registering for this as a stand-alone course. However, if you do complete this course first and then decide you'd like to pursue the certificate, you are eligible for advanced standing.

ON DEMAND
16 HOURS
$1300
ONLINE COURSE

Prices subject to change

+ CPA Canada Public Sector Accounting Handbook

Your source for important information on accounting and assurance for the public sector, all in one place. This handbook covers guidance on financial reporting in government at the local, provincial, territorial and federal level as well as other public sector bodies.

Available in French.

DIGITAL | PRINT

MEMBER: $130
NON-MEMBER: $140

+ CPA Canada Standards and Guidance Collection

This thorough resource provides you with up-to-date information on accounting and assurance standards, the implementation of IFRS, ASPE, CAS and more.

Available in French.

DIGITAL | PRINT

MEMBER: $195+
NON-MEMBER: $675

Leadership

+ Cross-Functional Collaboration to Deliver Critical Goals

One of the biggest challenges in strategic and operational planning is alignment. But when teams do collaborate across functional lines, your organization is more likely to achieve its most important goals.

This virtual classroom offers you strategies and tools for leadership using a cross-functional lens. It also demonstrates how the Supporting Lines model can not only improve your bottom line but increase employee engagement as well.

NOV. 25, 2020 | 3 HOURS

MEMBER: $395
NON-MEMBER: $475

VIRTUAL CLASSROOM

+ From Overwhelmed to Flourishing: Eight Steps to Thrive

Learn the eight steps it takes to thrive, including the foundations of resilience and awareness in your professional life. This webinar will equip you with practical strategies you need to better manage feeling stressed out and overwhelmed.

ON DEMAND | 1 HOUR

MEMBER: $65
NON-MEMBER: $80

WEBINAR

+ Leading Organizations From a People Perspective

When was the last time you thought about your leadership style? This online course includes activities and exercises designed to provoke both self- and organizational analysis. Learn how to build a strong organizational culture that prioritizes the importance of people as agents of change, along with results-oriented ideas and action plans.

ON DEMAND | 4 HOURS

MEMBER: $160
NON-MEMBER: $195

ONLINE COURSE

+ Show Up Like a Coach

Coaching isn't just a skillset; it's a mindset that can make all the difference in business. Empower your team and boost performance with evidence-based insights from award-winning executive coach, Jennifer Gervès-Keen.

Available in French.

PRINT

$27.99

+ ## Success Podcast Series — Leadership 2.0

As leaders, how do CPAs and finance professionals create goodwill across their organizations and leverage their leadership characteristics?

This special podcast series is designed to complement and support real-life experiences encountered by CPAs. Listen to CPAs and other business professionals discuss the concept and importance of the personal balance sheet, as well as how to embrace diversity and inclusion in the workplace.

ON DEMAND

1 HOURS

MEMBER: $49
NON-MEMBER: $59

PODCAST

+ ## Success Podcast Series — Upholding Professional Integrity

Integrity is the core of the CPA profession. In this podcast series, explore the current trends around financial crimes and corporate misconduct, how to be prepared for them, and how to help jeopardized businesses recover.

ON DEMAND

1 HOURS

MEMBER: $49
NON-MEMBER: $59

PODCAST

Other

+ ## Babie$: The Real Story of How Much They Cost

If you're a new or expecting parent, this book will help you create a baby budget, plan parental leave, explore different childcare options and be aware of the hidden costs associated with a growing family.

DIGITAL

PRINT

MEMBER: $4+
NON-MEMBER: $5+

+ ## Procrastinator's Guide to Retirement: How You Can Retire in 10 Years or Less

This go-to guide for late starters will help you find your way through today's maze of retirement issues. Get a clear direction on what you need to do now to live comfortably when you retire.

Available in French.

DIGITAL

PRINT

MEMBER: $7+
NON-MEMBER: $10+

+ ## Protecting You and Your Money: A Guide to Avoiding Identity Theft and Fraud

Learn how to you protect yourself from financial fraud, including tips for spotting current scams, getting your life back on track after identity theft and find where to go for help and support.

Available in French.

DIGITAL

PRINT

MEMBER: $7+
NON-MEMBER: $10+

Performance Management

+ CPA Success Podcast Series: Leadership and Performance Measurement

In this special six-part podcast series, you'll dive into a wide range of leadership and performance management topics. Discover how critical skills in leadership and PM are for a successful career.

ON DEMAND
2 HOURS
MEMBER: $99
NON-MEMBER: $120
PODCAST

+ Enhancing Public Sector Program and Service Delivery through Operational Costing

Public sector organizations are continually challenged to understand the true operational costs that support the programs and services they provide to Canadians. Changes to funding as well as ever-increasing resource constraints can make it difficult to maintain effective costing models for current and forecast service delivery.

In this hands-on virtual classroom, you'll walk through a structured multistep approach to implement improved operational costing in your organization. The key to this is understanding what's required to improve operational business processes, increase efficiencies and, as a result, optimize resources while retaining the quality of an organization's programs and services.

OCT. 8, 2020
3 HOURS
$395
VIRTUAL CLASSROOM

+ Effective Operational Planning and Budgeting in the Public Sector

A successful strategic approach to operations can help you improve service delivery and achieve better performance outcomes in the public sector.

This virtual classroom will help you determine the right tools and strategies to use when planning and budgeting for operations. You'll learn how to increase the long-term sustainability of your organization's programs and services using activity-based planning and dynamic scenarios to forecast potential outcomes.

SEPT. 24, 2020
3 HOURS
$395
VIRTUAL CLASSROOM

+ Evidence-Based Decision Making in the Public Sector

Evidence requirements change as you move from the idea stage through to a final decision, and it's vital that you and decision makers understand the limitations of the data used.

In this virtual classroom, you'll learn how to help maintain an efficient government with the right tools to evaluate options and make well-informed recommendations on programs, policies and other initiatives. Find out why not all evidence is equal, as well as how you can adapt your analysis to position feedback depending on where you are on the decision-making continuum.

TBD
3 HOURS
$395
VIRTUAL CLASSROOM

Prices subject to change

+ Excel Certificate

Are you ready to create functional and dynamic spreadsheets in Excel? Enhance your knowledge and skills with in-depth information on Excel formulas and functions for data analysis, spreadsheet modelling, financial analysis and more.

By the end of this ten-course program, you'll have a stronger grasp on Excel to support your work in business, accounting or finance. Learn at your own pace with support from extensive resources, ebooks and practical examples along the way.

- Introduction to Excel: Beginning the Journey to Spreadsheet Mastery
- Formulas and Functions: An Introduction to the Power of Excel
- Excel Formatting Tools: How to Add Eye-Catching Elements
- Excel Formulas and Functions: Logic and Lookups
- Excel Math and Finance Functions: Formulas for Business Decision Makers
- Excel Date and Time Functions: Theory and Application
- Excel Test and Information Functions: It's Not All About the Numbers
- Excel Tables and Tabular Data
- Introduction to Pivot Tables in Excel
- Introduction to Data Visualization: Turning Data Into Information in Excel

Courses can be taken individually as well, but you must complete all ten to earn the certificate.

ON DEMAND
29 HOURS
MEMBER: $1695
NON-MEMBER: $1995
ONLINE CERTIFICATE

+ Public Sector Certificate

Increase your knowledge of public sector finance and explore how to make the most strategic use of government resources to create public value. In this three-part program, you'll benefit from a curriculum that bridges theory and practice for real-life applications.

Level I lays the foundation for financial decision making in a public sector context. Level II builds on the content above to give you more in-depth coverage and additional advanced topics. And finally, during the capstone, you'll collaborate with other participants in real-time applied learning activities and interactive case studies.

Topics for level I, II and the capstone include:

- Public sector accounting
- Governance and decision-making
- Financial management
- Operating and capital budgets
- Public sector auditing
- Leadership development
- Risk management
- Ethics and accountability
- Strategic planning and sustainability
- Other emerging issues

Each level of the program can be taken individually as well, but you must complete both as well as the capstone to earn the certificate.

LEVEL I AND II: ON DEMAND
CAPSTONE: SPRING 2020
84 HOURS
$4995
ONLINE AND VIRTUAL CERTIFICATE

Prices subject to change

+ Public Sector Financial Management

Excellent financial managers are in high demand in the public sector, and there's a need for continuous skills growth in this complex area.

Develop the essential skills you need to understand the public sector's financial context, including how it is distinct in matters of governance, accountability and resource management. You'll also learn best practices in planning, budgeting and costing for government programs and improve your PM skills. You'll also learn best practices in planning, budgeting and costing for government programs and improve your PM skills.

Note: This course has content overlap with the Public Sector Certificate. If you're currently enrolled in that program, we don't recommend registering for this as a stand-alone course. However, if you do complete this course first and then decide you'd like to pursue the certificate, you are eligible for advanced standing.

ON DEMAND
15 HOURS
$1300
ONLINE COURSE

?

Need help?

Our team is here to answer questions and help you decide which CPA Canada products are the right fit for your career goals. Call **1-855-769-0905** or email sales@cpacanada.ca to get in touch.

Tax

+ Ethics and Tax

An overview of ethics in the tax profession. Learn how to apply key concepts in ethics to the issues you face every day in your tax practice and hear from a wide range of tax practitioners about their experiences with ethics in tax.

You'll get an overview of ethics in the profession, including why it's essential to a successful tax practice, and review best practice models for ethical decision making.

ON DEMAND
4 HOURS
MEMBER: $289
NON-MEMBER: $335
ONLINE COURSE

+ GST/HST Course

With this course, you'll get a broad overview of GST/HST-related topics, including useful tips on how to resolve common problems. Take time to develop your knowledge about major indirect tax issues, starting with the basics and moving toward more technical subjects.

You'll also have the chance to review recent developments in GST/HST and how they may impact your clients, like place of supply rules, import/exports, ITC claims and more.

ON DEMAND
12 HOURS
MEMBER: $475
NON-MEMBER: $525
ONLINE COURSE

+ In-Depth Corporate Reorganizations

Building on corporate reorganization concepts introduced in the In-Depth Tax Program, this course covers the most recent amendments, issues and strategies for corporate reorganizations.

In this course, you will dive into detailed, technical tax rules and learn how to identify new tax planning opportunities for your clients or organization. You'll also explore the most effective methods for handling corporate purchases, sales and restructuring.

Note: Some advance online study and reading is required.

Prerequisite: Completion of the In-Depth Tax Program and two or more years of work experience in tax full-time. Some admissions may be made by special request. Additional in-residence and facility fees may apply.

CANCELLED FOR 2020
25 HOURS
$3495
IN-PERSON COURSE

Prices subject to change

+ In-Depth GST/HST

This comprehensive course delivers the in-depth foundational GST/HST training you need to succeed. Build a strong foundation of knowledge to create value-added benefits when advising about GST/HST.

You'll learn about the current indirect tax landscape across different sectors, along with policy, compliance and regulatory considerations. You'll also have the chance to address research techniques, special rules, input tax credits, inbound supplies, non-resident issues and more.

Note: Some advance online study and reading is required.

MAY 30 – JUN. 4, 2021
NIAGARA-ON-THE-LAKE, ON

34 HOURS

$3195
PLUS FACILITY FEE

IN-PERSON
COURSE

+ In-Depth International Tax

Expanding on the international tax concepts covered in the In-Depth Tax Program, this course covers the top issues surrounding the taxation of foreign operations.

You'll learn about the most effective planning strategies to minimize tax as it applies to businesses that either are expanding, or are considering expansion, outside of Canada. Plus, get advice from the experts on how to navigate foreign affiliate financing, inbound taxation, active business rules and foreign accrual property income.

Note: Some advance online study and reading is required.

Prerequisite: Completion of the In-Depth Tax Program and two or more years of work experience in tax full-time. Some admissions may be made by special request.Additional in-residence and facility fees may apply.

CANCELLED
FOR 2020

25 HOURS

$3495

IN-PERSON
COURSE

+ In-Depth Tax Issues for the Owner-Managed Business

Take what you learned about in the In-Depth Tax Program to the next level. This course is designed for tax professionals who work predominantly with owner-managed businesses, as well as those in industry who want to expand their knowledge.

Get practical solutions to help you navigate the intricate financial situations facing business owners today, including how to handle owner-manager renumeration and plan effectively for insurance, business succession, retirement and post-mortem taxation.

Note: Some advance online study and reading may be required.

Prerequisite: Completion of the In-Depth Tax Program and two or more years of full-time work expereince in tax. Some admissions may be made by special request. Additional in-residence and facility fees apply.

CANCELLED
FOR 2020

25 HOURS

$3495

IN-PERSON
COURSE

+ In-Depth Tax Program

The most comprehensive, practical and relevant income tax training in Canada. Build a strong foundation of the fundamental tax knowledge you need to succeed as a tax professional. It's an essential step for professional accountants seeking senior tax positions in advisory firms and corporate Canada.

This three-year program features an overview of the current Canadian tax landscape, covering more than 60 essential tax topics. It includes online learning, in-person group sessions and three seven-day residencies. The curriculum blends theory and on-the-job experience, including new technologies and an updated format to enrich your educational experience.

Note: This program requires that you have access to sufficient mentoring from a senior tax professional.

Requirements: You must be employed full-time in a tax role and spend at least 70 per cent of your time working on income tax matters. You must also be one of the following to qualify: a CPA; a lawyer called to the Canadian Bar; a CPA student or articling at a Canadian law firm; a university graduate. Additional in-residence and facility fees may apply.

STARTING FALL 2020
MULTIPLE LOCATIONS

UP TO 185HRS/YEAR

MORE INFO ONLINE

IN-PERSON AND
ONLINE LEARNING

+ Introduction to the Canadian *Income Tax Act*

The *Income Tax Act* is an essential reference point for all tax practitioners in Canada – whether you're a beginner or more experienced, and as a generalist or a specialist. Learn how to read and decode provisions as you deepen your understanding of this backbone piece of legislation.

ON DEMAND

1 HOUR

MEMBER: $59
NON-MEMBER: $75

ONLINE COURSE

+ Introduction to Transfer Pricing

Cover the core principles of Canadian transfer pricing and learn how to navigate the most relevant issues facing international businesses today.

With the latest guidance from the OECD and federal legislation, this course will help you understand the role of your organization and how its fits into the current transfer pricing landscape. You'll also build a solid foundation of knowledge in key areas, including core methodology, transactional profits and comparability analysis.

ON DEMAND

12 HOURS

MEMBER: $765
NON-MEMBER: $895

ONLINE COURSE

+ Overview of Canadian Tax and Law

If you are providing guidance to clients on income tax matters, Canada's tax and legal systems have critical touch points you need to keep top of mind. This course provides an overview of both systems.

Your learning will be divided into two sections. The tax section explains the objectives and the structure of the Canadian tax system, outlining sources of income, allowable deductions and the general scheme for determining income for tax purposes. The law section will bring you up to speed on the tools and concepts you need in commercial transactions and contract law.

ON DEMAND

15 HOURS

MEMBER: $595
NON-MEMBER: $655

ONLINE COURSE

+ Scientific Research and Experimental Development (SRED) Fundamentals

This course provides an overview of the federal and provincial SR&ED programs, expenditure categories and compliance requirements.

You'll learn about SR&ED deductions and investment tax credits, qualifying expenditures, audit review process and court cases.

ON DEMAND

12 HOURS

MEMBER: $595
NON-MEMBER: $695

ONLINE COURSE

Prices subject to change

+ Specialized GST/HST: Cross-Border Transactions

Facilitated by nationally recognized faculty, this course is a must for tax professionals who deal with cross-border activities. Dive into the complex GST/HST areas of non-residents and cross-border transactions.

You'll learn about sector-specific issues in ecommerce and financial services, like how to avoid or recover tax, applying drop shipment rules, and other reporting and compliance obligations.

ON DEMAND

12 HOURS

MEMBER: $765
NON-MEMBER: $895

ONLINE COURSE

+ Specialized GST/HST: Financial Services

Examine the dynamic indirect tax concepts and complex legislation that apply to financial institutions, services and pensions. This course is an ideal opportunity to expand your learning from the In-Depth GST/HST Course while building on practical experiences from your day-to-day financial work.

Be prepared to explore the latest changes in this important area of GST/HST. You will learn about compliance for financial institutions, input tax credits, special rules for seizures and repossessions, pension plans, cross-border assessment and more.

CANCELLED FOR 2020

15 HOURS

MEMBER: $995
NON-MEMBER :$1195

TBD

+ Specialized GST/HST: Public Sector Bodies

Do you work for or advise a public sector body? Charities, educational institutions, healthcare organizations, government agencies and not-for-profit organizations can face unique GST/HST issues.

Learn the underlying concepts and best strategies you need to handle GST/HST in this sector, including compliance, filing returns, tax credits and rebates, what exemptions apply under Schedule V of the *Excise Tax Act* and other special situations that are exclusive to public sector bodies.

ON DEMAND

12 HOURS

MEMBER: $765
NON-MEMBER: $895

ONLINE COURSE

+ Specialized GST/HST: Real Property

Real property transactions are usually taxable, however there are a number of special situations with exceptions to the rule.

This specialized course focuses on how the most current GST/HST rules apply to residential and commercial properties, the sale of land, rebates and more. Enhance your technical tax knowledge and learn valuable strategies you can successfully apply to real client situations.

ON DEMAND

10 HOURS

MEMBER: $475
NON-MEMBER: $525

ONLINE COURSE

Prices subject to change

+ EY's Federal Income Tax Act

Everything you need to navigate Canadian income tax. Take charge with this comprehensive guide and streamline your work thanks to interactive online features, purpose notes and other reference materials.

DIGITAL

PRINT

$159.50

+ EY's Guide to Tax Research and Writing

Learn what goes into the tax research process, including how laws are enacted and how to best communicate your findings to clients. Written for you by accountants, lawyers, and other professionals who have a basic familiarity with the concepts and principles of Canadian income tax.

DIGITAL

$39.50

+ Knotia News

Stay current on all the latest tax developments with customized email alerts that give you what you need, when you need it. This includes commentary from EY tax professionals, as well as relevant releases from Canada Revenue Agency, the Department of Finance and Canadian court rulings.

Custom options available: Choose one topic to receive information about or bundle several options together, it's up to you.

CUSTOMS AND TRADE

EMAIL ALERT

MEMBER: $155+
NON-MEMBER: $180+

FEDERAL INCOME TAX

EMAIL ALERT

MEMBER: $265+
NON-MEMBER: $280+

GST/HST & EXCISE

EMAIL ALERT

MEMBER: $175+
NON-MEMBER: $180+

PROVINCIAL TAXES

EMAIL ALERT

MEMBER: $175+
NON-MEMBER: $180+

+ Provincial Taxes

Canada's most up-to-date source on provincial tax. This subscription includes commentary and analysis; statutes and regulations; forms and guides; comparative tables; and other tax rate reference tools. You'll also receive related tax newsletters delivered straight to your inbox.

Custom options available: **Ontario**, **Quebec**, **Atlantic**, **Western Provinces**.

Available in French.

DIGITAL

MEMBER: $760
NON-MEMBER: $795

+ Tax Suite

Whether you're looking for insights on common tax issues, line-by-line references or new tips to better manage risk, Tax Suite can help you solve more tax problems. Access it 24/7 thanks to Knotia's reliable, always-online database.

Custom options available: **Ontario**, **Quebec**, **East**, **West** and **Premium**.

Available in French.

DIGITAL

MEMBER: $1430+
NON-MEMBER: $2445+

Technology

+ National Technology Forum

Gain a better understanding of how innovative emerging resources, tools and trends across the tech landscape will impact your business. This event covers everything from big data and artificial intelligence to cloud computing, blockchain, new enterprise resource planning platforms and more.

You will have the opportunity to learn from high profile keynotes in the tech world, get practical guidance on the latest tech solutions and feature comparisons, plus attend interactive roundtables and workshops that support strong performance outcomes.

JAN. 11–12, 2021 | 20 HOURS
STARTING AT $495 | VIRTUAL CONFERENCE

cpacanada.ca/techforum

+ CPA Success Podcast Series: IT and Innovation

Technology is changing how we do business, while new innovations can help increase your efficiency. In this special six-part podcast series, you will explore the latest tech opportunities and challenges affecting CPAs across sectors.

ON DEMAND | 2 HOURS
MEMBER: $99 NON-MEMBER: $120 | PODCAST

+ Cybersecurity Management for the Public Sector

With privacy breaches on the rise in Canada, cybersecurity has become an important issue for public sector bodies that collect, use and disclose personal information.

Developed in partnership with FMI, this online course will help you build a strong cybersecurity governance framework, successfully navigate today's most common cybersecurity threats, and learn how to better prevent attacks on your organization's data. This online course will help you build a strong cybersecurity governance framework, successfully navigate today's most common cybersecurity threats, and learn how to better prevent attacks on your organization's data.

ON DEMAND | 10 HOURS
$498 | ONLINE CERTIFICATE

+ Excel Certificate

Are you ready to create functional and dynamic spreadsheets in Excel? Enhance your knowledge and skills with in-depth information on Excel formulas and functions for data analysis, spreadsheet modelling, financial analysis and more.

By the end of this ten-course program, you'll have a stronger grasp on Excel to support your work in business, accounting or finance. Learn at your own pace with support from extensive resources, ebooks and practical examples along the way.

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- Formulas and Functions: An Introduction to the Power of Excel
- Excel Formatting Tools: How to Add Eye-Catching Elements
- Excel Formulas and Functions: Logic and Lookups
- Excel Math and Finance Functions: Formulas for Business Decision Makers
- Excel Date and Time Functions: Theory and Application
- Excel Test and Information Functions: It's Not All About the Numbers
- Excel Tables and Tabular Data
- Introduction to Pivot Tables in Excel
- Introduction to Data Visualization: Turning Data Into Information in Excel

Courses can be taken individually as well, but you must complete all ten to earn the certificate.

ON DEMAND | 33 HOURS
MEMBER: $2995 NON-MEMBER: $3595 | ONLINE CERTIFICATE

+ Staying Ahead of the Disruption Curve: Technology Solutions 2018 Podcast Series

How does technology affect the way CPAs make business decisions? This special series recaps discussions from the National Technology Forum. Listen to industry experts discuss the intricacies of emerging technology, enterprise resource planning implementation and cybersecurity.

ON DEMAND | 2 HOURS
MEMBER: $99 NON-MEMBER: $120 | PODCAST

+ Success Podcast Series — Technology and Social Trends for CPAs

The world around us is changing and, as CPAs, we need to acknowledge that our profession is also changing.

This special podcast series is designed to complement and support real-life experiences encountered by CPAs. Listen to CPAs and other business professionals discuss the latest hypes and trends around technology, as well as the relevant frameworks and developments in a society where sustainability and social issues matter.

ON DEMAND | 1 HOUR
MEMBER: $49 NON-MEMBER: $59 | PODCAST

+ Technology Issues Facing CPAs

Stay on top of the latest issues in cybersecurity, big data, analytics, artificial intelligence, blockchain and cloud computing. This webinar will give you a high-level overview, with professionals weighing in on how these tech developments are having a profound effect on businesses and CPAs.

ON DEMAND

1 HOUR

MEMBER: $59
NON-MEMBER: $75

WEBINAR

Not-for-Profit

Table of Contents

PROFESSIONAL DEVELOPMENT CATALOGUE – FOR THE NOT-FOR-PROFIT

PROFESSIONAL DEVELOPMENT CATALOGUE - FOR THE NOT-FOR-PROFIT

Audit

+ Auditing Not-for-Profit Organizations

Accounting practices and audit standards for not-for-profits have changed in recent years. Make sure your knowledge and skills are up-to-date in this specialized practice area.

In this course, you'll cover each phrase of the auditing process, from client and engagement acceptance to issuing the independent auditor's report. You'll also learn about risk assessment and how Canadian Auditing Standards apply to NFPs, plus best practices for the roles of auditor, management and board.

ON DEMAND
8 HOURS
MEMBER: $349
NON-MEMBER: $399
ONLINE COURSE

+ CPA Canada Handbook — Accounting

Make sure you know how to prepare financial statements in accordance with Canadian GAAP. This handbook includes the latest guidance on IFRS, ASPE, ASNPO and accounting standards for pension plans.

Available in French.

DIGITAL
PRINT
$300+

+ CPA Canada Standards and Guidance Collection

This thorough resource provides you with up-to-date information on accounting and assurance standards, the implementation of IFRS, ASPE, CAS and more.

Available in French.

DIGITAL
PRINT
MEMBER: $195+
NON-MEMBER: $675

Corporate Governance

+ 20 Questions Directors of Not-for-Profit Organizations Should Ask About CEO Succession

Explore the major factors NFP directors need to consider when it comes to CEO succession, especially for small and mid-sized organizations. This guide offers useful insights on planning ahead, including the board's role managing the impact of a change in leadership.

Available in French.

PRINT
MEMBER: $20
NON-MEMBER: $25

+ 20 Questions Directors of Not-for-Profit Organizations Should Ask About Risk

Risk is a reality for every not-for-profit organization, but it doesn't have to be a threat. This guide will help you parse your top responsibilities on oversight on a board, including how to identify, manage and mitigate the most pressing risks for NFPs today.

Available in French.

PRINT
MEMBER: $20
NON-MEMBER: $25

+ 20 Questions Directors of Not-for-Profit Organizations Should Ask About Social Enterprise

Your reference for common issues in NFP social enterprises. Browse expert guidance on how to develop an operations team, train a board, navigate risk management and follow the correct reporting requirements. This briefing also includes tips on measurable benchmarks for success.

Available in French.

PRINT
MEMBER: $20
NON-MEMBER: $25

+ 20 Questions Directors Should Ask About Building and Sustaining a Board

If you want a high-performing board, the quality and experience of individuals who serve – and the way they work together – is paramount. This publication will guide you through the various stages of board evolution, from creation to renewal.

Available in French.

PRINT
MEMBER: $20
NON-MEMBER: $25

+ A Guide to Financial Statements of Not-for-Profit Organizations: Questions Directors Should Ask

As a director, you can use this briefing to help you navigate the ins and outs of financial statements and other key duties surrounding financial affairs in a not-for-profit context.

Available in French.

PRINT

MEMBER: $20
NON-MEMBER: $25

+ Board Oversight and Not-for-Profit Program Evaluation

Support your organization's program evaluation process with the right tools and recommendations. This briefing will help you generate useful, credible insights to encourage evidence-based decision making among fellow board members, the CEO and staff.

Available in French.

PRINT

MEMBER: $20
NON-MEMBER: $25

+ Governance for Not-for-Profit Organizations: Questions for Directors to Ask

Does your organization have a good governance framework? Learn about board dynamics, the legislative requirements driving NFPs and how to create a thoughtful leadership strategy that supports productivity, accountability and mission-driven results.

Available in French.

PRINT

MEMBER: $20
NON-MEMBER: $25

+ Risk Oversight and Governance Collection

An ongoing series of concise publications that can help board leaders deal with the most relevant governance issues facing modern organizations. Learn how to ask tough questions, recognize common problems and implement best practices for your industry.

Available in French.

DIGITAL

MEMBER: $225
NON-MEMBER: $235

Prices subject to change

Conferences

+ Not-for-Profit Forum

Get the inspiration and practical support you need to be resilient in the midst of change and a complex operating environment. This year, the Not-for-Profit Forum is going fully virtual using an exciting, interactive 3D virtual platform.

Build new skills with deeper insights on innovation, funding and lessons learned from the pandemic through a series of interactive sessions, panels and Q&As. Plus, explore the latest issues in policy, leadership and how to reimagine the not-for-profit ecosystem for the future from Canada's top experts in the field.

Tune in from anywhere across the country and network between talks with other NFP professionals – all at an affordable price point with plenty of options to customize your package, including one-day or two-day options, workshops and an all-access pass.

FEB. 9–10, 2021
VANCOUVER, BC

UP TO 19 HOURS

STARTING AT $199

VIRTUAL CONFERENCE

cpacanada.ca/NFPForum

+ The ONE National Conference

The ONE is an unforgettable experience that's all about cutting-edge content: engaging sessions, inspiring expertise, great technical workshops and unparalleled networking opportunities with over 1,000 CPAs from across Canada.

You will also be able to select the package that best suits you. Come find out what the future holds for the profession – including how to embrace innovation and keep up with the pace of change, no matter what industry you're in.

NOV. 17–18, 2020

4–43 HOURS

STARTING AT $99

VIRTUAL CONFERENCE

cpacanada.ca/TheONE

Prices subject to change

Credentials

+ Certified in Financial Forensics (CFF)

JOINTLY PRESENTED BY AICPA

Take your CPA to the next level and deepen your expertise. When you earn the CFF, you join an exclusive community of professionals in forensic accounting with considerable knowledge, skills and experience.

Earning the CFF can help you stand out from the pack in this demanding field, distinguishing your expertise for clients and employers while also providing access to valuable tools and resources in forensic and valuation so you can keep growing your career.

ROLLING | VARIABLE
$400 – $500 | ONLINE AND/OR IN-PERSON

+ Certified Information Technology Professional (CITP)

JOINTLY PRESENTED BY AICPA

Enhance your career with a specialty credential. When you earn the CITP, you'll join an esteemed network of like-minded professionals from across North America and receive access to exceptional tools and professional resources.

Becoming a CITP offers a career boost by validating your strategic skills in financial information management. It also identifies you as a trustworthy IT audit and assurance expert and could help you land new referrals in a competitive marketplace.

ROLLING | VARIABLE
$400 – $500 | ONLINE AND/OR IN-PERSON

Prices subject to change

Ethics

+ Applied Ethics in a Professional Setting

Many individuals, corporations and other entities believe that by following the rules, they are adhering to sound ethical principles – but this isn't always
the case.

Go beyond the letter of the law. In this course, you'll explore a range of ethical concepts and case studies that grapple with important theoretical ethical dilemmas and consider the most effective way to handle those situations in practice.

ON DEMAND | 4 HOURS
MEMBER: $189 NON-MEMBER: $239 | ONLINE COURSE

+ Corporate Social Responsibility and Ethics

Discover what defines the CSR landscape today, including what it means to be good corporate citizen and the role that ethics play in business matters across different industries.

In this course, you'll learn how to help your organization enhance accountability, consider the implications of environmental accounting and reporting, and apply other best practices in corporate governance.

ON DEMAND | 4 HOURS
MEMBER: $189 NON-MEMBER: $239 | ONLINE COURSE

+ CPA Success Podcast Series: Ethics and Governance

Ethics is at the core of every CPA's professional reputation. In this special six-part podcast series, you will explore a wide range of ethical and governance issues impacting CPAs across all sectors.

ON DEMAND | 2 HOURS
MEMBER: $99 NON-MEMBER: $120 | PODCAST

+ Essence of Professionalism: Ethics, Rules and Standards

Adhering to a code of ethics is an important part of being a professional accountant. In this course, you will explore how ethical codes and responsibilities should be applied in your day-to-day professional activities as a CPA using practical exercises.

It also covers the tools you need to help resolve challenges in decision making and navigate public concerns about ethics in the profession.

ON DEMAND | 2 HOURS
MEMBER: $249 NON-MEMBER: $299 | ONLINE COURSE

Prices subject to change

PROFESSIONAL DEVELOPMENT CATALOGUE - FOR THE NOT-FOR-PROFIT

+ Ethics for the CFO

For many executives, ethical decisions can be challenging. In this course, you'll engage with hands-on case studies, theory and discuss real-life events to build ethical skills with C-suite leadership in mind.

You'll also learn why it's important for CFOs to embrace ethics in choices that have repercussions not only for yourself, but for your organizations and the public as well.

ON DEMAND | 4 HOURS | $229 | ONLINE COURSE

+ Ethics for the Consultant

As a consultant, ethics are central to the value of your services. Make sure you have the right skills to offer sound judgment to clients and navigate potential roadblocks.

Through a blend of theory, practice and case studies based on real-life events, you'll learn how to address the most common challenges – from business deals and tax issues to performance management and professional standards.

ON DEMAND | 4 HOURS | MEMBER: $255 NON-MEMBER: $310 | ONLINE COURSE

+ Ethical Principles and the Accounting Profession: Code Decoded

Created to complement your real-life experiences, this course will help you improve your ability to deal with ethical situations at every stage of your career. Work through a variety of case studies and interactive exercises, then see how your answers stack up against guidance from the experts.

ON DEMAND | 4 HOURS | MEMBER: $189 NON-MEMBER: $239 | ONLINE COURSE

Prices subject to change

PROFESSIONAL DEVELOPMENT CATALOGUE – FOR THE NOT-FOR-PROFIT

Prices subject to change

Financial Reporting

+ Accounting and Regulatory Updates from the 2019 Not-for-Profit Forum

Are you a finance professional on the go? Get critical updates on standards, financial statements and compliance in this three-part podcast series, featuring material from the latest NFP Forum.

ON DEMAND
3 HOURS
MEMBER: $130
NON-MEMBER: $150
PODCAST

+ Not-for-Profit Certificate I: Foundational Concepts

Charities and not-for-profits make significant contributions to the Canadian economy. That's why the sector needs skilled professionals who have solid financial acumen with a strong understanding of the differences between for-profit and not-for-profit (NFP) enterprises.

In this seven-course program, you'll hone your skills in key accounting and governance areas for NFPs. The ultimate goal? Ensuring the long-term financial success and sustainability of your organization for maximum impact.

Courses include:

- Introduction to Not-for-Profit Organizations
- Governance and Oversight
- Financial Statement Concepts
- Registered Charities
- Fund Accounting
- Deferral Method of Revenue Recognition
- Endowments and Other Key NFP Concepts

Note: You must complete all seven courses to earn the certificate. Although this program is designed for newcomers to the NFP world, it's recommended that you have a base understanding of business and financial management prior to enrollment.

ON DEMAND
40 HOURS
$1225
ONLINE CERTIFICATE

Prices subject to change

+ Not-for-Profit Certificate II: Managing Strategy and Risk

Navigating complex operating environments is becoming the norm for many Canadian not-for-profit organizations. That's why these organizations need leaders who have a solid understanding of the specific goals, opportunities and risks the NFP sector is facing, now and in the future.

In this new five-course program, you will develop deeper skills in strategy and risk to manage operational issues that are unique to NFP enterprises. Learn how to link mission to growth, align budgets with goals, identify potential risk factors and invest in the long-term financial sustainability of your organization.

Courses include:

- Strategy Planning and Management
- Budgeting and Cash Flow Projections
- Management of Risk
- Critical-risk-areas
- Assessing Financial Health

Note: This program is designed for professionals who have a solid understanding of the basics in finance, management and governance for the NFP sector. We recommend that you complete Not-For-Profit Certificate I: Foundational Concepts first or have an equivalent amount of experience prior to registration.

ON DEMAND
25 HOURS
$1095
ONLINE CERTIFICATE

+ A Guide to Financial Statements of Not-for-Profit Organizations: Questions Directors Should Ask

As a director, you can use this briefing to help you navigate the ins and outs of financial statements and other key duties surrounding financial affairs in a not-for-profit context.

Available in French.

PRINT
MEMBER: $20
NON-MEMBER: $25

+ CPA Canada Handbook — Accounting

Make sure you know how to prepare financial statements in accordance with Canadian GAAP. This handbook includes the latest guidance on IFRS, ASPE, ASNPO and accounting standards for pension plans.

Available in French.

DIGITAL
PRINT
$300+

Prices subject to change

+ CPA Canada Standards and Guidance Collection

This thorough resource provides you with up-to-date information on accounting and assurance standards, the implementation of IFRS, ASPE, CAS and more.

Available in French.

DIGITAL
PRINT

MEMBER: $195+
NON-MEMBER: $675

+ Model Financial Statements for Private Sector Not-for-Profit Organizations

A practical resource you can use to prepare high quality financial statements for NFPs. All models include examples and recommendations in compliance with *Part III of the CPA Canada Handbook – Accounting* as well as the standards in Part II that apply to not-for-profits.

Available in French.

DIGITAL

MEMBER: $410
NON-MEMBER: $450

+ Valuation for Financial Reporting (VFR) Certificate

Enhance your knowledge and skills in the area of valuation for financial reporting by completing this two part certificate course. Part I focuses on foundational valuation principles and methodologies. You will learn about the cost, market and income approaches to valuation as well as how to select an appropriate discount rate taking into account the company's specific circumstances. Part II takes a deeper dive into more advanced topics within valuation for financial reporting such as accounting for business combinations, valuation of intangible assets and impairment testing. Throughout both parts of the course you will be able to demonstrate the application of material using knowledge checks and in-depth case studies.

Parts I and II can be taken individually, but you must complete both to earn the certificate.

ON DEMAND
16 HOURS

MEMBER: $2590
NON-MEMBER: $2995

ONLINE AND VIRTUAL CERTIFICATE

Leadership

+ Cross-Functional Collaboration to Deliver Critical Goals

One of the biggest challenges in strategic and operational planning is alignment. But when teams do collaborate across functional lines, your organization is more likely to achieve its most important goals.

This virtual classroom offers you strategies and tools for leadership using a cross-functional lens. It also demonstrates how the Supporting Lines model can not only improve your bottom line but increase employee engagement as well.

NOV. 25, 2020
3 HOURS

MEMBER: $395
NON-MEMBER: $475

VIRTUAL CLASSROOM

+ From Overwhelmed to Flourishing: Eight Steps to Thrive

Learn the eight steps it takes to thrive, including the foundations of resilience and awareness in your professional life. This webinar will equip you with practical strategies you need to better manage feeling stressed out and overwhelmed.

ON DEMAND
1 HOUR

MEMBER: $65
NON-MEMBER: $80

WEBINAR

+ Innovation, Change and Leadership at the 2019 Not-for-Profit Forum

Good leaders embrace new ideas and opportunities to grow. Explore innovation, change and leadership issues in this three-part podcast series, featuring material from the latest NFP Forum.

ON DEMAND
3 HOURS

MEMBER: $129
NON-MEMBER: $140

PODCAST

+ Leading Organizations From a People Perspective

When was the last time you thought about your leadership style? This online course includes activities and exercises designed to provoke both self- and organizational analysis. Learn how to build a strong organizational culture that prioritizes the importance of people as agents of change, along with results-oriented ideas and action plans.

ON DEMAND
4 HOURS

MEMBER: $160
NON-MEMBER: $195

ONLINE COURSE

+ Show Up Like a Coach

Coaching isn't just a skillset; it's a mindset that can make all the difference in business. Empower your team and boost performance with evidence-based insights from award-winning executive coach, Jennifer Gervès-Keen.

Available in French.

PRINT

$27.99

+ Success Podcast Series — Upholding Professional Integrity

Integrity is the core of the CPA profession. In this podcast series, explore the current trends around financial crimes and corporate misconduct, how to be prepared for them, and how to help jeopardized businesses recover.

ON DEMAND

1 HOURS

MEMBER: $49
NON-MEMBER: $59

PODCAST

Need help?

Our team is here to answer questions and help you decide which CPA Canada products are the right fit for your career goals. Call **1-855-769-0905** or email sales@cpacanada.ca to get in touch.

Prices subject to change

Other

+ Babie$: The Real Story of How Much They Cost

If you're a new or expecting parent, this book will help you create a baby budget, plan parental leave, explore different childcare options and be aware of the hidden costs associated with a growing family.

DIGITAL

PRINT

MEMBER: $4+
NON-MEMBER: $5+

+ Procrastinator's Guide to Retirement: How You Can Retire in 10 Years or Less

This go-to guide for late starters will help you find your way through today's maze of retirement issues. Get a clear direction on what you need to do now to live comfortably when you retire.

Available in French.

DIGITAL

PRINT

MEMBER: $7+
NON-MEMBER: $10+

+ Protecting You and Your Money: A Guide to Avoiding Identity Theft and Fraud

Learn how to you protect yourself from financial fraud, including tips for spotting current scams, getting your life back on track after identity theft and find where to go for help and support.

Available in French.

DIGITAL

PRINT

MEMBER: $7+
NON-MEMBER: $10+

Prices subject to change

Performance Management

+ Board Oversight in Not-for-Profit Program Evaluation

Not-for-profit directors play an important role in the program evaluation process, which needs to generate useful information for evidence-based decision making. In this course, you'll learn how to improve oversight, review initiatives for impact, link goals to strategic direction and support your organization's mission.

ON DEMAND
29 HOURS
$129
ONLINE COURSE

+ Success Podcast Series — Leadership and Performance Measurement

In this special six-part podcast series, you'll dive into a wide range of leadership and performance management (PM) topics. Discover how critical skills in leadership and PM are for a successful career.

ON DEMAND
2 HOURS
MEMBER: $99
NON-MEMBER: $120
PODCAST

+ Excel Certificate

Are you ready to create functional and dynamic spreadsheets in Excel? Enhance your knowledge and skills with in-depth information on Excel formulas and functions for data analysis, spreadsheet modelling, financial analysis and more.

By the end of this ten-course program, you'll have a stronger grasp on Excel to support your work in business, accounting or finance. Learn at your own pace with support from extensive resources, ebooks and practical examples along the way.

- Introduction to Excel: Beginning the Journey to Spreadsheet Mastery
- Formulas and Functions: An Introduction to the Power of Excel
- Excel Formatting Tools: How to Add Eye-Catching Elements
- Excel Formulas and Functions: Logic and Lookups
- Excel Math and Finance Functions: Formulas for Business Decision Makers
- Excel Date and Time Functions: Theory and Application
- Excel Test and Information Functions: It's Not All About the Numbers
- Excel Tables and Tabular Data
- Introduction to Pivot Tables in Excel
- Introduction to Data Visualization: Turning Data Into Information in Excel

Courses can be taken individually as well, but you must complete all ten to earn the certificate.

ON DEMAND
29 HOURS
MEMBER: $1695
NON-MEMBER: $1995
ONLINE CERTIFICATE

+ Internal Controls and Fraud Prevention for Small and Medium Not-for-Profit Organizations

The challenges of fraud are on the rise in Canada, and that includes the not-for-profit sector. But strong internal controls can help fight that by increasing operational efficiency, reliable financial reporting and compliance.

In this course, you'll learn about the most common control-related challenges facing NFPs. Make sure your organization is protected with best practices in auditing and assurance that support internal control, risk management and good governance.

ON DEMAND
3 HOURS
$249
ONLINE COURSE

+ Not-for-Profit Certificate I: Foundational Concepts

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Note: You must complete all seven courses to earn the certificate. And although this program is designed for newcomers to the NFP world, it's recommended that you have a base understanding of business and financial management prior to enrollment.

ON DEMAND
40 HOURS
$1225
ONLINE CERTIFICATE

+ Not-for-Profit Certificate II: Managing Strategy and Risk

Navigating complex operating environments is becoming the norm for many Canadian not-for-profit organizations. That's why these organizations need leaders who have a solid understanding of the specific goals, opportunities and risks the NFP sector is facing, now and in the future.

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Courses include:

- Strategy Planning and Management
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- Management of Risk
- Critical-risk-areas
- Assessing Financial Health

Note: This program is designed for professionals who have a solid understanding of the basics in finance, management and governance for the NFP sector. We recommend that you complete Not-For-Profit Certificate I: Foundational Concepts first or have an equivalent amount of experience prior to registration.

ON DEMAND
25 HOURS
$1095
ONLINE CERTIFICATE

+ Not-for-Profit PolicyPro

Get up-to-date model policies based on Canadian compliance and best practices in the not-for-profit sector.

DIGITAL
STARTING AT $725

+ 20 Questions Directors of Not-for-Profit Organizations Should Ask About CEO Succession

Explore the major factors NFP directors need to consider when it comes to CEO succession, especially for small and mid-sized organizations. This guide offers useful insights on planning ahead, including the board's role managing the impact of a change in leadership.

Available in French.

PRINT
MEMBER: $20
NON-MEMBER: $25

+ 20 Questions Directors of Not-for-Profit Organizations Should Ask About Risk

Risk is a reality for every not-for-profit organization, but it doesn't have to be a threat. This guide will help you parse your top responsibilities on oversight on a board, including how to identify, manage and mitigate the most pressing risks for NFPs today.

Available in French.

PRINT
MEMBER: $20
NON-MEMBER: $25

+ 20 Questions Directors of Not-for-Profit Organizations Should Ask About Social Enterprise

Your reference for common issues in NFP social enterprises. Browse expert guidance on how to develop an operations team, train a board, navigate risk management and follow the correct reporting requirements. This briefing also includes tips on measurable benchmarks for success.

Available in French.

PRINT
MEMBER: $20
NON-MEMBER: $25

+ 20 Questions Directors Should Ask About Building and Sustaining a Board

If you want a high-performing board, the quality and experience of individuals who serve – and the way they work together – is paramount. This publication will guide you through the various stages of board evolution, from creation to renewal.

Available in French.

PRINT
MEMBER: $20
NON-MEMBER: $25

+ Board Oversight and Not-for-Profit Program Evaluation

Support your organization's program evaluation process with the right tools and recommendations. This briefing will help you generate useful, credible insights to encourage evidence-based decision making among fellow board members, the CEO and staff.

Available in French.

PRINT
MEMBER: $20
NON-MEMBER: $25

+ Returning Revenues Post-Pandemic: How to Diversify your Donor Base and Income Streams

CPA CANADA AND THE CANADIAN ASSOCIATION OF GIFT PLANNERS

Canadian charities are experiencing the largest revenue shift in our history right now – and that's before factoring in the effect of the COVID-19 pandemic. Individual donor numbers are declining and cash donations have been replaced by gifts of assets, like securities and life insurance.

Find out how to best navigate these trends in charity finance and get on track to rebounding for long-term sustainability. In this webinar, you will learn about how to take advantage of strategies like donor-advised funds and personal foundation gifts, as well as how to apply the latest regulatory updates in the charity sector.

OCT. 21, 2020

3 HOURS

$99

VIRTUAL CLASSROOM

+ Governance for Not-for-Profit Organizations: Questions for Directors to Ask

Does your organization have a good governance framework? Learn about board dynamics, the legislative requirements driving NFPs and how to create a thoughtful leadership strategy that supports productivity, accountability and mission-driven results.

Available in French.

PRINT

MEMBER: $20
NON-MEMBER: $25

Prices subject to change

Risk Management and Internal Control

+ Risk Oversight and Governance Collection

An ongoing series of concise publications that can help board leaders deal with the most relevant governance issues facing modern organizations. Learn how to ask tough questions, recognize common problems and implement best practices for your industry.

Available in French.

DIGITAL

MEMBER: $225
NON-MEMBER: $235

Prices subject to change

Technology

+ National Technology Forum

Gain a better understanding of how innovative emerging resources, tools and trends across the tech landscape will impact your business. This event covers everything from big data and artificial intelligence to cloud computing, blockchain, new enterprise resource planning platforms and more.

You will have the opportunity to learn from high profile keynotes in the tech world, get practical guidance on the latest tech solutions and feature comparisons, plus attend interactive roundtables and workshops that support strong performance outcomes.

JAN. 11–12, 2021
20 HOURS
STARTING AT $495
VIRTUAL CONFERENCE

cpacanada.ca/techforum

+ Cybersecurity Frameworks Certificate

Growing concerns about cybersecurity are changing how companies in every industry approach risk management. In this two-course certificate program, you will learn how to protect your organization's data and become a strategic advisor on cybersecurity issues.

The first course focuses on the essentials of IT security and threats, while the second offers practical insights on how to select the right security framework for your business.

Courses can be taken individually as well, but you must complete both to earn the certificate.

ON DEMAND
10 HOURS
$498
ONLINE CERTIFICATE

+ Data Management Certificate

Many organizations are facing the same challenge: too much raw data and not enough refined, usable data. Companies need leaders who can navigate the implications of digital disruption, be responsive to change and make evidence-based decisions.

In this program, you will learn how to harness the power of data and turn it into meaningful information for financial and strategic purposes. The curriculum includes targeted courses that combine theory and practice on the key components of data management.

- Data Preparation I: Cleansing, Modelling and Dashboards
- Data Preparation II: Introduction to Power BI
- Data Preparation II: Introduction to Tableau
- Navigating Data Analytics
- Decision Making and Critical Thinking in a Data-Driven World
- Data Landscape for the Future Accountant

Courses can be taken individually as well, but you must complete five to earn the certificate. Only one version of Data Preparation II must be completed.

ON DEMAND
33 HOURS
MEMBER: $2995
NON-MEMBER: $3595
ONLINE CERTIFICATE

+ Excel Certificate

Are you ready to create functional and dynamic spreadsheets in Excel? Enhance your knowledge and skills with in-depth information on Excel formulas and functions for data analysis, spreadsheet modelling, financial analysis and more.

By the end of this ten-course program, you'll have a stronger grasp on Excel to support your work in business, accounting or finance. Learn at your own pace with support from extensive resources, ebooks and practical examples along the way.

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- Excel Formatting Tools: How to Add Eye-Catching Elements
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- Excel Math and Finance Functions: Formulas for Business Decision Makers
- Excel Date and Time Functions: Theory and Application
- Excel Test and Information Functions: It's Not All About the Numbers
- Excel Tables and Tabular Data
- Introduction to Pivot Tables in Excel
- Introduction to Data Visualization: Turning Data Into Information in Excel

Courses can be taken individually as well, but you must complete all ten to earn the certificate.

ON DEMAND
33 HOURS
MEMBER: $2995
NON-MEMBER: $3595
ONLINE CERTIFICATE

+ Technology Issues Facing CPAs

Stay on top of the latest issues in cybersecurity, big data, analytics, artificial intelligence, blockchain and cloud computing. This webinar will give you a high-level overview, with professionals weighing in on how these tech developments are having a profound effect on businesses and CPAs.

ON DEMAND
1 HOURS
MEMBER: $59
NON-MEMBER: $75
WEBINAR

+ Staying Ahead of the Disruption Curve: Technology Solutions 2018 Podcast Series

How does technology affect the way CPAs make business decisions? This special series recaps discussions from the National Technology Forum. Listen to industry experts discuss the intricacies of emerging technology, enterprise resource planning implementation and cybersecurity.

ON DEMAND
2 HOURS
MEMBER: $99
NON-MEMBER: $120
PODCAST

PROFESSIONAL DEVELOPMENT CATALOGUE – FOR THE NOT-FOR-PROFIT

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