Table of Contents

Industry p. 1
Practitioner p. 25
Public Sector p. 51
Not-for-profit p. 69
# Table of Contents

**Audit**
- Best Practices in IS Audit 4
- Bringing Artificial Intelligence to Financial Audit 4
- Look Out, the Auditors Are Coming 4
- The Inventory Count Process for Auditors 4

**Credentials**
- Certified Information Technology Professional (CITP) 5

**Conferences**
- The ONE National Conference 6
- Commodity Tax Symposium 6
- National Technology Forum 6
- Scientific Development and Experimental Development Symposium 6
- Oil and Gas Conference 7
- Conference for Audit Committees 7

**Ethics**
- Applied Ethics in a Professional Setting 8
- Corporate Social Responsibility and Ethics 8
- CPA Success Podcast Series: Ethics and Governance 8
- Essence of Professionalism: Ethics, Rules and Standards 8
- Ethical Principles and the Accounting Profession: Code Decoded 9
- Ethics for the CFO 9
- Ethics for the Consultant 9

**Financial Reporting**
- In-Depth Brokers and Investment Dealers 10
**Leadership**
Cross-Functional Collaboration to Deliver Critical Goals 11
Emerging Leaders Certificate 11
From Overwhelmed to Flourishing: Eight Steps to Thrive 11
Future-Ready Leader Workshop 11
Leading Organizations From a People Perspective 12
Managing Change in the Age of Disruption 12

**Performance Management**
Building a Dynamic, Scenario-Based Forecast 13
CPA Success Podcast Series: Leadership and Performance Measurement 13
Data Management Certificate 13
Effective Operational Planning and Budgeting 13
Excel Certificate 14
Executing Performance Through Strategy Mapping 14
Explaining Strategy and Understanding Innovation: The Business Model Canvas 14
Financial Risk Management: Fundamental Concepts 14
Financial Structuring: Senior Debt 15
Finding Opportunities for Growth in International Trade 15
Foreign Exchange Risk Management 15
How to Ensure Financial Stability Through Analytical Decision-Making 15
Implementing Effective Planning, Costing and Budgeting 15
In-Depth Brokers and Investment Dealers 16
International Trade Webinars 16
Performance Management and Strategy Certificate 16
Pricing and Customer Profitability 16

**Sustainability**
Corporate Social Responsibility and Ethics 17
Finding Success Through Resilience and Adaptability: Contemporary Matters 17
Practical Aspects of Business Valuation 17
**Tax**
Accounting for Income Taxes
Advanced International Tax
Ethics and Tax
GST/HST Course
In-Depth Corporate Reorganizations
In-Depth GST/HST
In-Depth International Tax
In-Depth Tax Issues for the Owner-Managed Business
In-Depth Tax Program
Introduction to the Canadian *Income Tax Act*
Introduction to Transfer Pricing
Overview of Canadian Tax and Law
Safe Income and Safe Income on Hand
Scientific Research and Experimental Development (SRED) Fundamentals
Specialized GST/HST: Cross-Border Transactions
Specialized GST/HST: Financial Services
Specialized GST/HST: Real Property
U.S. Corporate Tax for the Canadian Practitioner

**Technology**
CPA Success Podcast Series: IT and Innovation
Cybersecurity Frameworks Certificate
Excel Certificate
Staying Ahead of the Disruption Curve: Technology Solutions 2018 Podcast Series
Technology Issues Facing CPAs
The ONE 2018 Podcast Series: Technology and Leadership
Audit

+ **Best Practices in IS Audit**

Despite growing recognition for the importance of healthy and well-managed information systems (IS), IS audits are less familiar to many senior executives than traditional financial audits.

In this webinar, you will explore the challenges of technology-enabled information systems and develop a deeper understanding of the scope of IS auditing, including what to look for and how to get started.

- **ON DEMAND**
- **2 HOURS**
- **MEMBER: $150**
- **NON-MEMBER: $180**
- **WEBINAR**

+ **Look Out, the Auditors Are Coming**

The external audit has long been viewed as a necessary evil – but as a senior leader, there’s value in using this exercise to gain valuable insights about your organization.

In this webinar, you will learn how to best prepare for the arrival of auditors and ensure you are asking the right questions to tap into this unique source of knowledge and benchmarking information.

- **ON DEMAND**
- **2 HOURS**
- **MEMBER: $150**
- **NON-MEMBER: $180**
- **WEBINAR**

+ **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.

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

Prices subject to change
Credentials

+ **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

The PD and Events Guide is a customized biweekly roundup of professional development resources, offerings and news delivered straight to your inbox. Visit [cpacanada.ca/MyAccount](http://cpacanada.ca/MyAccount) to update your preferences.

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 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. 23-24, 2019**
**MONTREAL, QC**
**14 HOURS**
**$1095**

[www.cpacanada.ca/TheONE](http://www.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.

**OCT. 23-24, 2019**
**OTTAWA, ON**
**14 HOURS**
**$1595**

[www.cpacanada.ca/CTS](http://www.cpacanada.ca/CTS)

+ **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.

**SPRING 2020**
**TORONTO, ON**
**12 HOURS**
**$695**

[www.cpacanada.ca/TECHFORUM](http://www.cpacanada.ca/TECHFORUM)

+ **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.

**NOV. 19, 2019**
**TORONTO, ON**
**7 HOURS**
**$695**

[www.cpacanada.ca/SREDsymposium](http://www.cpacanada.ca/SREDsymposium)

Prices subject to change
+ **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, 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. 26-27, 2019**
**CALGARY, AB**

**14 HOURS**

**$1395**

[www.cpacanada.ca/OilGas](http://www.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. 9-10, 2019**
**TORONTO, ON**

**14 HOURS**

**$1595**

[www.cpacanada.ca/AuditCommittees](http://www.cpacanada.ca/AuditCommittees)
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**
  - **7 HOURS**
  - **MEMBER: $249**
  - **NON-MEMBER: $299**
  - **ONLINE COURSE**

Prices subject to change
+ 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 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**

+ 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

**MEMBER:** $255  
**NON-MEMBER:** $295  
**ONLINE COURSE**
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, 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. 28-29, 2019**
- **TORONTO, ON**
- **14 HOURS**
- **$1950**

**IN-PERSON COURSE**
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. 19, 2019**
- **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**

+ **Future-Ready Leader Workshop**

Transformative leaders aren’t born, they’re made. Invest in skills that will help you navigate the risks and opportunities of disruption.

In this hands-on workshop, you’ll learn how to identify hard trends that are driving change for your organization – from key social and economic factors to new issues in technology, the environment and geopolitics – then build a personal leadership action plan that applies those insights.

- **Winter 2020**
- **7 hours**
- **$695**
- **In-person Workshop**

+ **Emerging Leaders Certificate**

If you want to rise through the ranks to the management level, or if you want to become more effective in your current leadership role, you need to cultivate the mindset of a leader.

Learn how you can become an exceptional leader in this new certificate program, building specialized skills to help you think more strategically, perform under pressures, master difficult conversations and act more decisively.

Study at your own pace with dynamic materials to support your journey, including a behavioural intelligence questionnaire, modules, podcasts, forum discussions and other digital resources.

- **On demand**
- **25 hours**
- **Member: $1050**
- **Non-member: $1250**
- **Online Certificate**
+ **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**

**MEMBER: $160**

**NON-MEMBER: $195**

**ONLINE COURSE**

**4 HOURS**

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+ **Managing Change in the Age of Disruption**

**COMING SOON.**

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**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.

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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.

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

+ **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
- 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 all five to earn the certificate.

| TBD | 3 HOURS | MEMBER: $2995 | NON-MEMBER: $3595 | ONLINE CERTIFICATE |

+ **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 |

+ **Effective 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.

| TBD | 3 HOURS | MEMBER: $395 | NON-MEMBER: $475 | 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.

+ 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.

+ 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.

+ 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.

Prices subject to change.
+ **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.

- **OCT. 8, 2019**
- **3 HOURS**
- **MEMBER: $395**
- **NON-MEMBER: $475**
- **VIRTUAL CLASSROOM**

+ **How to Ensure Financial Stability Through Analytical Decision-Making**

Being able to properly forecast and interpret financial information is often the difference between an organization’s failure or success.

In this virtual classroom, you will explore the common financial issues that businesses experience and identify opportunities to improve. You’ll also learn how to prepare a robust cash flow plan and confidently interpret the results of your financial analysis.

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

+ **Finding Opportunities for Growth in International Trade**

More companies are looking to expand their businesses beyond Canada. This joint webinar from Export Development Canada and the Forum for International Trade Training will help you better understand the exporting process and how global economic trends could help grow your business.

- **ON DEMAND**
- **1 HOUR**
- **FREE**
- **WEBINAR**

+ **Implementing Effective Planning, Costing and Budgeting**

In this hands-on, two-day workshop, you will build a deeper understanding of integrated resource management through practical exercises, proven techniques and ready-to-apply solutions that are grounded in a real-world context using the CAM-I method.

The key takeaway? The ability to create dynamic business models that accurately forecast operational improvements and optimization without sacrificing the quality of your company’s products and services.

- **SUMMER 2020**
- **TORONTO, ON**
- **14 HOURS**
- **$1195**
- **IN-PERSON WORKSHOP**

+ **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. 28-29, 2019
TORONTO, ON
14 HOURS
$1950

+ International Trade Webinars

JOINTLY PRESENTED BY EXPORT DEVELOPMENT CANADA

Get updates on a variety of trade topics that are relevant to your work as a CPA. These expert-led sessions will not only enhance your international trade knowledge, but help you make smarter business decisions:
- Bringing the Best Out of Brexit
- Making the Connection with New Customers
- Selling Your Services to the World
- Growing South: How Small Businesses Can Sell to the U.S
- CETA: Your Introduction to 500 Million EU Consumers
- How to Manage Risk in International Business
- How to Benefit from Canada’s New Free Trade Agreement (CPTPP)

ON DEMAND
FREE
WEBINAR

+ 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 to 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: DEC. 3 AND 10, 2019
APRIL 1 AND 8, 2020
JUNE 23, 2020
40 HOURS
$2890

+ 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

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 |

+ **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 |

+ **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 |

**VIDEOS SERIES**

Prices subject to change
**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**

- **MEMBER:** $795
- **NON-MEMBER:** $895
- **ONLINE COURSE** 20 HOURS

**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**

- **MEMBER:** $475
- **NON-MEMBER:** $525
- **ONLINE COURSE** 12 HOURS

**Advanced International Tax**

COMING SOON.

**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**

- **MEMBER:** $289
- **NON-MEMBER:** $335
- **ONLINE COURSE** 4 HOURS

**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. Some admissions may be made by special request.

**IN-PERSON COURSE**

- **NOV. 9-13, 2019**
- **BLUE MOUNTAINS, ON**
- **25 HOURS**
- **$3495**

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.

- **SUMMER 2020 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.

- **FALL 2020 NIAGARA-ON-THE-LAKE, ON**
  - 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 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.

- **NOV. 9–13, 2019 BANFF, AB**
  - 25 HOURS
  - $3495
  - IN-PERSON COURSE

**Prices subject to change**
+ 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 50 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 and/or articling student working at a Canadian law firm; a university graduate.

ON DEMAND 12 HOURS
MEMBER: $765
NON-MEMBER: $895
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 it 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: $165
NON-MEMBER: $185
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: $645
ONLINE COURSE

+ 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

+ Professional Development Catalogue - For Industry

STARTING FALL 2019
MULTIPLE LOCATIONS
UP TO 185 HRS/YEAR
MORE INFO ONLINE
IN-PERSON AND ONLINE LEARNING

Prices subject to change
+ **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**

+ **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.

- **ON DEMAND**
  - **15 HOURS**
  - **FALL 2020 TORONTO, ON**
  - **MEMBER: $995**
  - **NON-MEMBER: $1195**
  - **IN-PERSON COURSE**

+ **Scientific Research and Experimental Development (SRED) Fundamentals**

COMING SOON.

+ **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 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**

+ **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

MEMBER: $475
NON-MEMBER: $525

10 HOURS

ONLINE COURSE
Technology

+ 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 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

+ 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

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
MEMBER: $99
NON-MEMBER: $120
2 HOURS
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
MEMBER: $59
NON-MEMBER: $75
1 HOUR
WEBINAR

+ The ONE 2018 Podcast Series: Technology and Leadership
As new technologies emerge, they’re changing the way CPAs work and think, as are the latest approaches to leadership. Hear from industry experts as they discuss the evolution of tech and leadership in the profession, as well as how you will be able to apply those learnings to your career.

ON DEMAND
$99
PODCAST

2 HOURS
Table of Contents

Audit
Analytical Procedures: A Guide for Practitioners
Auditing Not-for-Profit Organizations
Best Practices in IS Audit
Bringing Artificial Intelligence to Financial Audit
Look Out, the Auditors Are Coming
Materiality and Risk in Audit and Review Engagements
The Inventory Count Process for Auditors

Credentials
Certified in Financial Forensics (CFF)
Certified Information Technology Professional (CITP)

Conferences
The ONE National Conference
Commodity Tax Symposium
National Technology Forum
Public Sector Conference
Oil and Gas Conference
Conference for Audit Committees
Scientific Research and Experimental Development Symposium

Ethics
Applied Ethics in a Professional Setting
Corporate Social Responsibility and Ethics
CPA Success Podcast Series: Ethics and Governance
Essence of Professionalism: Ethics, Rules and Standards
Ethical Principles and the Accounting Profession: Code Decoded
Ethics for the Auditor
Ethics for the CFO
Ethics for the Consultant
<table>
<thead>
<tr>
<th>Financial Reporting</th>
<th>35</th>
</tr>
</thead>
<tbody>
<tr>
<td>In-Depth Brokers and Investment Dealers</td>
<td>35</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Leadership</th>
<th>36</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cross-Functional Collaboration to Deliver Critical Goals</td>
<td>36</td>
</tr>
<tr>
<td>Emerging Leaders Certificate</td>
<td>36</td>
</tr>
<tr>
<td>From Overwhelmed to Flourishing: Eight Steps to Thrive</td>
<td>36</td>
</tr>
<tr>
<td>Future-Ready Leader Workshop</td>
<td>36</td>
</tr>
<tr>
<td>Leading Organizations From a People Perspective</td>
<td>37</td>
</tr>
<tr>
<td>Managing Change in the Age of Disruption</td>
<td>37</td>
</tr>
<tr>
<td>The Materiality of Millennials</td>
<td>37</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Performance Management</th>
<th>38</th>
</tr>
</thead>
<tbody>
<tr>
<td>Building a Dynamic, Scenario-Based Forecast</td>
<td>38</td>
</tr>
<tr>
<td>CPA Success Podcast Series: Leadership and Performance Measurement</td>
<td>38</td>
</tr>
<tr>
<td>Effective Operational Planning and Budgeting</td>
<td>38</td>
</tr>
<tr>
<td>Excel Certificate</td>
<td>39</td>
</tr>
<tr>
<td>Executing Performance Through Strategy Mapping</td>
<td>39</td>
</tr>
<tr>
<td>Explaining Strategy and Understanding Innovation: The Business Model Canvas</td>
<td>39</td>
</tr>
<tr>
<td>Financial Risk Management: Fundamental Concepts</td>
<td>40</td>
</tr>
<tr>
<td>Financial Structuring: Senior Debt</td>
<td>40</td>
</tr>
<tr>
<td>Foreign Exchange Risk Management</td>
<td>40</td>
</tr>
<tr>
<td>How to Ensure Financial Stability Through Analytical Decision-Making</td>
<td>40</td>
</tr>
<tr>
<td>Implementing Effective Planning, Costing and Budgeting</td>
<td>41</td>
</tr>
<tr>
<td>In-Depth Brokers and Investment Dealers</td>
<td>41</td>
</tr>
<tr>
<td>Performance Management and Strategy Certificate</td>
<td>41</td>
</tr>
<tr>
<td>Pricing and Customer Profitability</td>
<td>41</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Sustainability</th>
<th>42</th>
</tr>
</thead>
<tbody>
<tr>
<td>Corporate Social Responsibility and Ethics</td>
<td>42</td>
</tr>
<tr>
<td>Finding Success Through Resilience and Adaptability: Contemporary Matters</td>
<td>42</td>
</tr>
<tr>
<td>Practical Aspects of Business Valuation</td>
<td>42</td>
</tr>
</tbody>
</table>
Tax

Accounting for Income Taxes
Advanced International Tax
Ethics and Tax
GST/HST Course
Income Tax for the General Practitioner
In-Depth Corporate Reorganizations
In-Depth GST/HST
In-Depth International Tax
In-Depth Tax Issues for the Owner-Managed Business
In-Depth Tax Program
Introduction to the Canadian Income Tax Act
Introduction to Transfer Pricing
Overview of Canadian Tax and Law
Safe Income and Safe Income on Hand
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Specialized GST/HST: Public Sector Bodies
Specialized GST/HST: Real Property
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U.S. Personal Tax for the Canadian Practitioner

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Cybersecurity Frameworks Certificate
Excel Certificate
The ONE 2018 Podcast Series: Technology and Leadership
Staying Ahead of the Disruption Curve: Technology Solutions 2018 Podcast Series
Technology Issues Facing CPAs
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**

+ **Best Practices in IS Audit**

Despite growing recognition for the importance of healthy and well-managed information systems (IS), IS audits are less familiar to many senior executives than traditional financial audits.

In this webinar, you will explore the challenges of technology-enabled information systems and develop a deeper understanding of the scope of IS auditing, including what to look for and how to get started.

- **ON DEMAND**
- **2 HOURS**
- **MEMBER: $150**
- **NON-MEMBER: $180**
- **WEBINAR**

+ **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**

Prices subject to change
Look Out, the Auditors Are Coming

The external audit has long been viewed as a necessary evil—but as a senior leader, there’s value in using this exercise as an opportunity to gain valuable insights about your organization.

In this webinar, you will learn how to best prepare for the arrival of auditors and ensure you are asking the right questions to tap into this unique source of knowledge and benchmarking information.

ON DEMAND 2 HOURS

MEMBER: $150
NON-MEMBER: $180
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.

ONLINE COURSE

TBD 3 HOURS

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

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
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
$400 – 500

+ 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
$400 – 500

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 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. 23-24, 2019
MONTREAL, QC
14 HOURS
$1095

www.cpacanada.ca/TheONE

+ 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.

SPRING 2020
TORONTO, ON
12 HOURS
$695

www.cpacanada.ca/TECHFORUM

+ 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.

OCT. 23-24, 2019
OTTAWA, ON
14 HOURS
$1595

www.cpacanada.ca/CTS

+ 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. 28-29, 2019
OTTAWA, ON
14 HOURS
IN-PERSON: $1095
VIRTUAL: $895

www.cpacanada.ca/PSC

Prices subject to change
+ **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, 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.

**RECIPES**

- **NOV. 26-27, 2019**
- **CALGARY, AB**
- **14 HOURS**
- **$1395**
- **TORONTO, ON**
- **IN-PERSON CONFERENCE**

[www.cpacanada.ca/OilGas](http://www.cpacanada.ca/OilGas)

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+ **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.

**RECIPES**

- **NOV. 19, 2019**
- **TORONTO, ON**
- **7 HOURS**
- **IN-PERSON CONFERENCE**

[www.cpacanada.ca/SREDsymposium](http://www.cpacanada.ca/SREDsymposium)

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+ **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.

**RECIPES**

- **DEC. 9-10, 2019**
- **TORONTO, ON**
- **14 HOURS**
- **$1595**
- **IN-PERSON CONFERENCE**

[www.cpacanada.ca/AuditCommittees](http://www.cpacanada.ca/AuditCommittees)
+ **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**

+ **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**

+ **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**

+ **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**
- **7 HOURS**
- **MEMBER: $249**
- **NON-MEMBER: $299**
+ 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**
  - MEMBER: $189
  - NON-MEMBER: $239

- **ONLINE COURSE**
  - 4 HOURS

+ 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**
  - MEMBER: $255
  - NON-MEMBER: $295

- **ONLINE COURSE**
  - 4 HOURS

+ 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**
  - MEMBER: $255
  - NON-MEMBER: $295

- **ONLINE COURSE**
  - 4 HOURS

+ 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**
  - MEMBER: $255
  - NON-MEMBER: $310

- **ONLINE COURSE**
  - 4 HOURS

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, 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. 28-29, 2019
TORONTO, ON

14 HOURS
IN-PERSON COURSE

$1950

Get more from your PD

The PD and Events Guide is a customized biweekly roundup of professional development resources, offerings and news delivered straight to your inbox. Visit cpacanada.ca/MyAccount to update your preferences.
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. 19, 2019
3 HOURS
MEMBER: $395
NON-MEMBER: $475

+ **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

+ **Emerging Leaders Certificate**

If you want to rise through the ranks to the management level, or if you want to become more effective in your current leadership role, you need to cultivate the mindset of a leader.

Learn how you can become and exceptional leader in this new certificate program, building specialized skills to help you think more strategically, perform under pressure, master difficult conversations and act more decisively.

Study at your own pace with dynamic materials to support your journey, including a behavioural intelligence questionnaire, modules, podcasts, forum discussions and other digital resources.

WINTER 2020
7 HOURS
$695
IN-PERSON WORKSHOP

+ **Future-Ready Leader Workshop**

Transformative leaders aren’t born, they’re made. Invest in skills that will help you navigate the risks and opportunities of disruption.

In this hands-on workshop, you’ll learn how to identify hard trends that are driving change for your organization – from key social and economic factors to new issues in technology, the environment and geopolitics – then build a personal leadership action plan that applies those insights.

PRICES SUBJECT TO CHANGE
+ 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

+ Managing Change in the Age of Disruption

COMING SOON.

+ 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: $219  NON-MEMBER: $255
ONLINE COURSE
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.

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

+ Effective 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.

TBD 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

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.

+ 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

Prices subject to change
+ **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**

- **5 HOURS**
- **MEMBER: $219**
- **NON-MEMBER: $255**

+ **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**

+ **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.

**OCT. 8, 2019**

- **3 HOURS**
- **MEMBER: $395**
- **NON-MEMBER: $475**

+ **How to Ensure Financial Stability Through Analytical Decision-Making**

Being able to properly forecast and interpret financial information is often the difference between an organization’s failure or success.

In this virtual classroom, you will explore the common financial issues that businesses experience and identify opportunities to improve. You’ll also learn how to prepare a robust cash flow plan and confidently interpret the results of your financial analysis.

**TBD**

- **3 HOURS**
- **MEMBER: $395**
- **NON-MEMBER: $475**

Prices subject to change
+ Implementing Effective Planning, Costing and Budgeting

In this hands-on, two-day workshop, you will build a deeper understanding of integrated resource management through practical exercises, proven techniques and ready-to-apply solutions that are grounded in a real-world context using the CAM-I method.

The key takeaway? The ability to create dynamic business models that accurately forecast operational improvements and optimization without sacrificing the quality of your company’s products and services.

SUMMER 2020
TORONTO, ON
14 HOURS
$1195
IN-PERSON WORKSHOP

+ 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. 28-29, 2019
TORONTO, ON
14 HOURS
$1950
IN-PERSON COURSE

+ 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: DEC. 3 AND 10, 2019
APR. 1 AND 8, 2020
JUN. 23, 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

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

+ 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

+ 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

Prices subject to change
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

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

Advanced International Tax
COMING SOON.

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

Income Tax for the General Practitioner
This comprehensive course offers a sound overview of the Income Tax Act and explore some of the critical tax issues that you’ll handle often as a general practitioner.

In it, you’ll gain a better appreciation of strategic tax planning techniques and improve your ability to identify relevant tax issues, from partnerships and 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.

ON DEMAND
44 HOURS
MEMBER: $3495
NON-MEMBER: $3995
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. Some admissions may be made by special request.

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.

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.

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 work experience in tax full-time. Some admissions may be made by special request.
+ **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 50 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 and/or articling student working at a Canadian law firm; a university graduate.

**+ 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 it 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: $645

ONLINE COURSE

**+ 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

Prices subject to change
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

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.

FALL 2020
TORONTO, ON

15 HOURS

MEMBER: $995
NON-MEMBER: $1195

IN-PERSON COURSE

Scientific Research and Experimental Development (SRED) Fundamentals

COMING SOON.

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: 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

Prices subject to change
+ **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. 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**

+ **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
Technology

+ 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 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

+ 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

Prices subject to change
+ The ONE 2018 Podcast Series: Technology and Leadership
As new technologies emerge, they’re changing the way CPAs work and think, as are the latest approaches to leadership. Hear from industry experts as they discuss the evolution of tech and leadership in the profession, as well as how you will be able to apply those learnings to your career.

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

+ 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

Prices subject to change
# PUBLIC SECTOR

## Table of Contents

### Conferences
- Public Sector Conference
- The ONE National Conference
- Commodity Tax Symposium
- National Technology Forum
- Scientific Research and Experimental Development Symposium

### Ethics
- CPA Success Podcast Series: Ethics and Governance
- Ethics for the Public Sector

### Financial Reporting
- Public Sector Certificate
- Public Sector Financial Reporting and Accounting

### Leadership
- Cross-Functional Collaboration to Deliver Critical Goals
- Emerging Leaders Certificate
- From Overwhelmed to Flourishing: Eight Steps to Thrive
- Future-Ready Leader Workshop
- Leading Organizations From a People Perspective
- Managing Change in the Age of Disruption

### Performance Management
- CPA Success Podcast Series: Leadership and Performance Measurement
- Effective Operational Planning and Budgeting in the Public Sector
- Evidence-Based Decision Making in the Public Sector
- Excel Certificate
- Public Sector Certificate
- Public Sector Financial Management
Tax

Ethics and Tax 62
GST/HST Course 62
In-Depth Corporate Reorganizations 62
In-Depth GST/HST 63
In-Depth International Tax 63
In-Depth Tax Issues for the Owner-Managed Business 63
In-Depth Tax Program 64
Introduction to the Canadian *Income Tax Act* 64
Introduction to Transfer Pricing 64
Overview of Canadian Tax and Law 64
Scientific Research and Experimental Development (SRED) Fundamentals 65
Specialized GST/HST: Cross-Border Transactions 65
Specialized GST/HST: Financial Services 65
Specialized GST/HST: Public Sector Bodies 65
Specialized GST/HST: Real Property 65

Technology

CPA Success Podcast Series: IT and Innovation 66
Cybersecurity Management for the Public Sector 66
Excel Certificate 66
The ONE 2018 Podcast Series: Technology and Leadership 67
Staying Ahead of the Disruption Curve: Technology Solutions 2018 Podcast Series 67
Technology Issues Facing CPAs 67
Conferences

+ 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. 28-29, 2019
OTTAWA, ON
14 HOURS
IN-PERSON: $1095
VIRTUAL: $895
www.cpacanada.ca/PSC

+ 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.

OCT. 23-24, 2019
OTTAWA, ON
14 HOURS
IN-PERSON OR VIRTUAL CONFERENCE
www.cpacanada.ca/CTS

+ 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.

SPRING 2020
TORONTO, ON
12 HOURS
IN-PERSON CONFERENCE
www.cpacanada.ca/TECHFORUM

+ 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. 23-24, 2019
MONTREAL, QC
14 HOURS
$1095
www.cpacanada.ca/TheONE
+ **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.

**NOV. 19, 2019**  
**TORONTO, ON**  
**7 HOURS**  
**$695**  
**IN-PERSON CONFERENCE**

[www.cpacanada.ca/SREDsymposium](http://www.cpacanada.ca/SREDsymposium)
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
COMING FALL 2019.

GET MORE FROM YOUR PD
The PD and Events Guide is a customized biweekly roundup of professional development resources, offerings and news delivered straight to your inbox. Visit cpacanada.ca/MyAccount to update your preferences.
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.

+ 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.
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. 19, 2019
3 HOURS
MEMBER: $395
NON-MEMBER: $475
VIRTUAL CLASSROOM

+ Emerging Leaders Certificate
If you want to rise through the ranks to the management level, or if you want to become more effective in your current leadership role, you need to cultivate the mindset of a leader.

Learn how you can become and exceptional leader in this new certificate program, building specialized skills to help you think more strategically, perform under pressures, master difficult conversations and act more decisively.

Study at your own pace with dynamic materials to support your journey, including a behavioural intelligence questionnaire, modules, podcasts, forum discussions and other digital resources.

WINTER 2020
7 HOURS
$695
IN-PERSON WORKSHOP

+ 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

+ Future-Ready Leader Workshop
Transformative leaders aren’t born, they’re made. Invest in skills that will help you navigate the risks and opportunities of disruption.

In this hands-on workshop, you’ll learn how to identify hard trends that are driving change for your organization - from key social and economic factors to new issues in technology, the environment and geopolitics - then build a personal leadership action plan that applies those insights.

WINTER 2020
7 HOURS
$695
IN-PERSON WORKSHOP

Prices subject to change
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

Managing Change in the Age of Disruption
COMING SOON.
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

+ 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.

OCT. 9, 2019 AND DEC. 11, 2019 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.

OCT. 9, 2019 AND DEC. 11, 2019 3 HOURS
$395  VIRTUAL CLASSROOM

Prices subject to change
+ **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.

<table>
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<tr>
<th>Level I and II: On Demand Capstone: Spring 2020</th>
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<tr>
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<tr>
<td>29 Hours</td>
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</table>
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.
+ 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

+ 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.

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

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.

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+ **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 remuneration 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 work experience in tax full-time. Some admissions may be made by special request.

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+ **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.
+ **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 50 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 and/or articling student working at a Canadian law firm; a university graduate.

**STARTING FALL 2019**  
**MULTIPLE LOCATIONS**  
**UP TO 185 HRS/YEAR**  
**MORE INFO ONLINE**  
**IN-PERSON AND ONLINE LEARNING**

+ **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: $645**

ONLINE COURSE

+ **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 HOURS**

**MEMBER: $59**  
**NON-MEMBER: $75**

ONLINE COURSE

Prices subject to change
+ **Scientific Research and Experimental Development (SRED) Fundamentals**

COMING SOON.

+ **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.

+ **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.

+ **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.

+ **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.

**FALL 2020**

TORONTO, ON

15 HOURS

MEMBER: $995
NON-MEMBER: $1195

ON-PERSON COURSE

**ON DEMAND**

12 HOURS

MEMBER: $765
NON-MEMBER: $895

ONLINE COURSE

Prices subject to change
Technology

+ 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.

<table>
<thead>
<tr>
<th>ON DEMAND</th>
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<tbody>
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<tr>
<td>PODCAST</td>
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</tr>
</tbody>
</table>

+ Cybersecurity Management for the Public Sector
COMING FALL 2019.

+ 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.

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<tr>
<td>ONLINE CERTIFICATE</td>
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</table>
+ The ONE 2018 Podcast Series: Technology and Leadership

As new technologies emerge, they’re changing the way CPAs work and think, as are the latest approaches to leadership. Hear from industry experts as they discuss the evolution of tech and leadership in the profession, as well as how you will be able to apply those learnings to your career.

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

+ 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

+ 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

Prices subject to change
# Table of Contents

## Audit
Auditing Not-for-Profit Organizations

## Conferences
- Not-for-Profit Forum
- The ONE National Conference
- National Technology Forum

## Ethics
CPA Success Podcast Series: Ethics and Governance

## Financial Reporting
Not-for-Profit Certificate

## Leadership
- Cross-Functional Collaboration to Deliver Critical Goals
- Emerging Leaders Certificate
- From Overwhelmed to Flourishing: Eight Steps to Thrive
- Future-Ready Leader Workshop
- Leading Organizations From a People Perspective

## Performance Management
- Board Oversight in Not-for-Profit Program Evaluation
- CPA Success Podcast Series: Leadership and Performance Measurement
- Excel Certificate
- Fundraising and Finance: Gift Acceptance, Administration and Growth for Charities
- Internal Controls and Fraud Prevention for Small and Medium Not-for-Profit Organizations
- Not-for-Profit Certificate
- Best of the 2018 Not-for-Profit Forum
### Technology

<table>
<thead>
<tr>
<th>Course Title</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>CPA Success Podcast Series: IT and Innovation</td>
<td>79</td>
</tr>
<tr>
<td>Cybersecurity Frameworks Certificate</td>
<td>79</td>
</tr>
<tr>
<td>Excel Certificate</td>
<td>79</td>
</tr>
<tr>
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<td>80</td>
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<td>80</td>
</tr>
<tr>
<td>Technology Issues Facing CPAs</td>
<td>80</td>
</tr>
</tbody>
</table>
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
MEMBER: $349
NON-MEMBER: $399

ONLINE COURSE
8 HOURS
Conferences

+ Not-for-Profit Forum
Financial sustainability and digital disruption continue to influence the future of NFPs. Are you ready for what’s next? Come to Canada’s premiere event for not-for-profit leaders and get the inspiration and practical support you need to thrive in today’s complex operating environment.

Through a series of talks and interactive sessions, you will develop actionable insights that tie mission to growth and boost performance outcomes. You’ll also be able to explore the latest issues in policy, compliance, disruptive tech and more from Canada’s top not-for-profit experts.

FEB. 10–11, 2020
VANCOUVER, BC
14 HOURS
ONE DAY: $549
TWO DAYS: $995
VIRTUAL: $895

www.cpacanada.ca/NFPForum

+ 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.

SPRING 2020
TORONTO, ON
12 HOURS
$695

IN-PERSON CONFERENCE

www.cpacanada.ca/TECHFORUM

+ 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. 23-24, 2019
MONTREAL, QC
14 HOURS
$1095

IN-PERSON CONFERENCE

www.cpacanada.ca/TheONE

Prices subject to change
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

GET MORE FROM YOUR PD

The PD and Events Guide is a customized 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

+ Not-for-Profit Certificate

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

MEMBER: $1225
NON-MEMBER: $1495

40 HOURS

ONLINE 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 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. 19, 2019 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

+ Emerging Leaders Certificate

If you want to rise through the ranks to the management level, or if you want to become more effective in your current leadership role, you need to cultivate the mindset of a leader.

Learn how you can become an exceptional leader in this new certificate program, building specialized skills to help you think more strategically, perform under pressures, master difficult conversations and act more decisively.

Study at your own pace with dynamic materials to support your journey, including a behavioural intelligence questionnaire, modules, podcasts, forum discussions and other digital resources.

ON DEMAND 25 HOURS
MEMBER: $1050 NON-MEMBER: $1250 ONLINE CERTIFICATE

+ Future-Ready Leader Workshop

Transformative leaders aren’t born, they’re made. Invest in skills that will help you navigate the risks and opportunities of disruption.

In this hands-on workshop, you’ll learn how to identify hard trends that are driving change for your organization – from key social and economic factors to new issues in technology, the environment and geopolitics – then build a personal leadership action plan that applies those insights.

WINTER 2020 7 HOURS
$695 IN-PERSON WORKSHOP

Prices subject to change
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

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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 2 HOURS

$129 ONLINE COURSE

+ **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.

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- 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

+ **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
+ Fundraising and Finance: Gift Acceptance, Administration and Growth for Charities

With increased competition and a continuously changing landscape, long-term financial sustainability is critical for most charitable organizations. However, many small and medium charities are leaving money on the table.

In this virtual classroom, you’ll learn how to set up the right financial operations to accept, manage and administer asset-based donations and bequests. You’ll also cover common issues in gift processing, receipting and securities, plus what’s new in donor trends.

DEC. 5, 2019 3 HOURS
MEMBER: $395
NON-MEMBER: $475
VIRTUAL CLASSROOM

+ Not-for-Profit Certificate

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.

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- 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. 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
MEMBER: $1225
NON-MEMBER: $1495
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

+ Best of the 2018 Not-for-Profit Forum

Get access to six of the top sessions from the 2018 Not-for-Profit Forum on the key challenges ahead for NFP executives. Boost your knowledge about accounting and finance in the not-for-profit sector and stay current on the latest strategies in leadership, data-driven fundraising, inclusive organizational culture and stakeholder engagement.

ON DEMAND 6 HOURS
MEMBER: $299
NON-MEMBER: $349
VIDEO SERIES

Prices subject to change
Technology

+ 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 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

+ 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

Prices subject to change
+ **The ONE 2018 Podcast Series: Technology and Leadership**

As new technologies emerge, they’re changing the way CPAs work and think, as are the latest approaches to leadership. Hear from industry experts as they discuss the evolution of tech and leadership in the profession, as well as how you will be able to apply those learnings to your career.

**ON DEMAND**

- **2 HOURS**
- **PODCAST**
- **MEMBER: $99**
- **NON-MEMBER: $120**

+ **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**
- **PODCAST**
- **MEMBER: $99**
- **NON-MEMBER: $120**

+ **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**
- **WEBINAR**
- **MEMBER: $59**
- **NON-MEMBER: $75**

Prices subject to change