

In-Depth Tax Program 2021 Tutorial Series Facilitators

The CPA Canada In-Depth Tax Program is the most comprehensive tax training available in Canada. It is the training ground of choice for qualified professionals in public practice, industry, government or legal environments, who are serious about working and specializing in the taxation area.

CPA Canada is looking for motivated individuals with a passion for education, interested in a challenging and highly rewarding experience, to be Tutorial Series Facilitators for 2021.

New for 2021, Weekly sessions of the Tutorial Series will be offered during the summer and fall, and tutorial times will be offered both during, and after, business hours.

- Summer session (August-September): weeks of August 3, 10, 17, 24, 31, September 7, 14, 21, 28
- Fall session (September-October): weeks of September 7, 14, 21, 28, October 5, 12, 19, 26, November 2.

Following acceptance, you will be asked to select your preferred date and time combination.

Facilitators are responsible for:

- Participating in **mandatory** online training sessions including participation in:
 - Kick-off call for all facilitators
 - Weekly facilitator meetings
 - Online facilitation skills and Zoom use practice sessions
 - *Note – new facilitators, or those who did not facilitate during 2020, must also attend a full online facilitation skills training program that combines live sessions, practice, feedback, independent study and reflection, delivered over four weeks prior to the start of the tutorial series (approximately 3 hours per week)*
 - Current or prior completion of on-line eLearning courses on the CPA Way for Tax and how to facilitate for the In-Depth Tax Program, and Zoom classroom training videos
- Preparing for tutorial sessions in advance. Advanced preparation includes:
 - Understanding the CPA Way for Tax problem solving methodology used by participants to approach and analyse tax cases.
 - Thoroughly understanding the tutorial problems and suggested solutions.

- Preparing and executing facilitation strategies for each session based on the facilitator guides provided. This includes creating a comfortable learning environment for participants, and encouraging participation from all students in discussions.
- An in-depth understanding of the technical subject matter in order to respond to participant queries. As such, your area of practice should correspond directly with the content coverage at each of the tutorial series courses
 - Private corporations and related tax & estate planning = Tutorial Series 1 or 2
 - Corporate reorganizations / M&A or international tax = Tutorial Series 3
- Attending all facilitator meetings throughout the course
- Reporting on participant attendance and participation to CPA Canada for each tutorial session
- Understanding and following CPA Canada's policies for the In-Depth Tax Program

NOTE – in order to improve the learning experience for course participants, many of the problems and facilitating methodologies have changed from prior years

Adequate preparation requires approximately 60 to 80 hours. Preparation time, as well as time facilitating tutorial sessions, qualifies for CPD hours. Please contact your provincial regulating body to determine what qualifies as verifiable CPD vs. unverifiable CPD.

Successful candidates will have the following qualifications and skills:

- A CPA (CA, CGA, CMA), LLB (tax) or MTax
- Successful completion of the In-Depth Tax Program or MTax credential
- Currently employed in public practice, industry or government **working full-time** in the area of income tax
- Experience facilitating small group discussions and/or teaching in an adult learning environment,
- Technical proficiency and experience in the topical areas of coverage,
- Excellent tax research skills,
- Superior verbal communication skills, and
- A passion for education

Applicants for TS1 must have:

- Minimum 1-year of experience as a CPA Canada Group Study Facilitator,
- Minimum 2-years of post-In-Depth experience working full-time in income tax, with at least 70% of time devoted to income tax planning and compliance,
- Practical experience for technical topics covered - Corporate taxation, Shareholder taxation, Relationships, Control, AoC, TOSI, Trusts, Partnership

Applicants for TS2 must have:

- Minimum 2-years of experience as a CPA Canada Group Study, ORC or TS1 (IR1) Facilitator,
- Minimum 4-years of post-In-Depth experience working full-time in income tax, with at least 70% of time devoted to income tax planning and compliance,
- Practical experience for technical topics covered - Exchange transactions (85, 86, 51), Amalgamations & windups, s.84.1 / 55, Estate freezes, Post mortem taxation, Introduction to international tax

Applicants for TS3 must have:

- Minimum 2-years of experience as a CPA Canada Group Study, ORC or TS1or2 (IR1or2) Facilitator,
- Minimum 5-years of post-In-Depth experience working full-time in income tax, with at least 70% of time devoted to income tax planning
- Practical experience for technical topics covered - 55(2), Intro to 55(3), Debt forgiveness, 88(1)(d) & restrictive covenants, Foreign affiliates, FAPI, Inbound taxation

Compensation: The compensation for this role is \$7,500

To apply:

- Complete the online registration form no later than May 16, 2021
2021 TS Facilitator Application
- If applying from a National Accounting Firm (KPMG, PWC, Deloitte, Ernst & Young, BDO Canada, Grant Thornton and MNP), contact your Tax Learning Leader

Application deadline: May 16, 2021