CHARTERED PROFESSIONAL ACCOUNTANTS ONTARIO

PRACTITIONERS' CONFERENCE

SEPTEMBER 17 – 19, 2015

NOTTAWASAGA INN RESORT, ALLISTON

For Professionals. By Professionals.

Your Pathway To Success.

Each year, more than 200 practitioners gather at CPA Ontario's annual Practitioners' Conference to enhance their knowledge in this unique area of professional accounting.

Thursday, September 17, 2015

1 – 2 p.m.
Registration and Exhibitor Showcase

2 – 2:30 p.m.
Welcome and Opening Remarks
Carol Wilding, FCPA, FCA,
President and CEO, CPA Ontario

2:30 – 3:30 p.m.
The Art of Negotiation
Cindy Pinkus, LL.B.

Negotiation is the crucial art of getting others to accept, and even embrace your point of view, and can mean the difference between success and failure. In this condensed session, Cindy Pinkus will highlight important elements of successful negotiation, including:

- A step-by-step approach that leads to an agreement
- How to react to others' negotiating styles
- Negotiation strategies that will help get beyond "no"

3:30 – 4 p.m.
Networking Break and Exhibitor Showcase

4 – 5 p.m.
Keynote Address: Workplace Fraud 101
David Malamed, CPA, CA, Partner, Forensic and Dispute Resolution, Grant Thornton LLP

With the typical organization losing five per cent of its revenues to fraud each year, it is paramount as a trusted adviser to help educate and protect your clients. Forensic specialist David Malamed will identify the realities of internal fraud using real life examples and stories to illustrate how you can work with your clients to deter, detect and investigate fraud. The presentation will focus on:

- Victim mindset
- Preventative controls
- Techniques to identify and qualify red flags
- Reduce risk and exposure
- Avenues for recovery

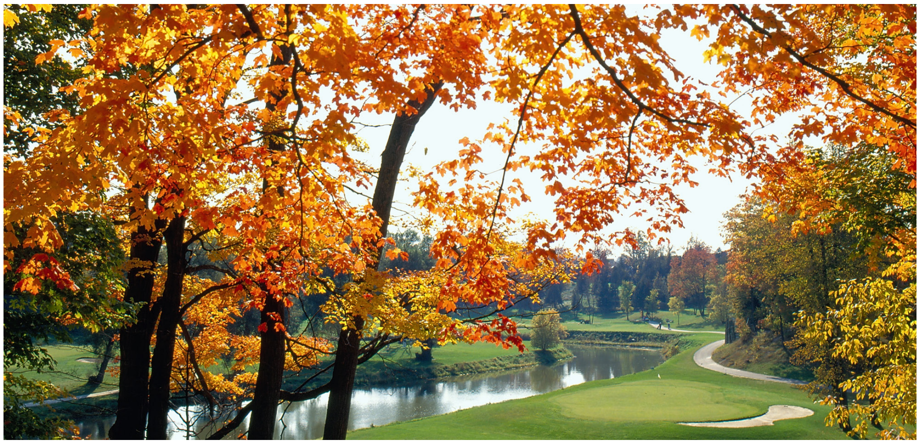
6 – 9 p.m.
Welcome Reception and Dinner

Friday, September 18, 2015

8 – 9 a.m.
Networking Breakfast and Exhibitor Showcase

9 – 10:30 a.m.
Keynote Address
Michael Cadesky, FCPA, FCA, Managing Partner, Cadesky Tax

10:30 a.m. – 12:30 p.m
Concurrent Sessions (Select One)



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1 Top Compliance Issues for Registered Charities, their Directors and their Accountants
Mark Blumberg, B.A., LL.B., LL.M., TEP, Blumberg Segal LLP, Barristers & Solicitors

Running a registered charity is increasingly complex, and far more challenging than running a comparable business. Accountants are often in an excellent position to assist charities in becoming more compliant and thus reducing potential liability.

Lawyer Mark Blumberg will cover the top 20 compliance issues for Canadian Registered Charities and share how directors and officers can govern a charity responsibly, protect its property and avoid facing personal liability. This presentation will also offer a checklist tool that accountants can use to monitor the most important compliance issues.

2 Helping Business Owners through Sale or Succession
Howard E. Johnson, FCPA, FCA, FCMA, Managing Director, Veracap M&A International Inc.

Transitions in business can be difficult to handle. This session will show how CPAs can help their clients navigate a succession, regardless if it's a management buy-out or third party sale. Topics will include pre-transition planning, the sale or succession process, negotiations, deal structuring alternatives, negotiations and common pitfalls to avoid.

3 Effective Communication Strategy to Fuel Your Business
René Bertrand, Chief Consulting Officer, 3D Performance Consulting

Communication is a critical function in any organization, from the very small to the very large. Even one-to-one communications can be charged with challenges and misunderstandings. By communicating purposefully and focusing on results and relationships, businesses can leverage effective communication strategies to convey information to employees, negotiate the best deals with suppliers and market your products and services to your customers.

We will explore insights and techniques on how to develop and implement an effective and sustainable communication strategy that aligns your objectives with the interests of your clients/stakeholders and your business.

4 Marketing Your Practice
Paul Busch, CPA, CA, President and Owner, Paul A. Busch CA Professional Corporation

These days, it isn't enough to be an excellent accountant — your practice needs to stand out in order to draw clients. This presentation will help you establish the services your firm should offer, the clients to target, teach you how to create a referral network and offer insight on how best to sell your services.

12:30 – 1:30 p.m.
Networking Lunch and Exhibitor Showcase

1:30 – 4 p.m.
Concurrent Sessions (Select One)
includes a 30-minute networking break at 2:30 p.m.

1 Completing the T3010 Registered Charity Information Return
Bill Harper, CPA, CA, Vice-President, Finance and Operations, Imagine Canada

Media coverage of charities focuses on issues such as the cost and methods of fundraising, the amount of "overhead" or administrative costs incurred, and the nature and cost of political activities undertaken. These are also areas of intense scrutiny by CRA in their charitable audits. And charities' T3010 returns are at the centre of all this scrutiny.

Many accounting firms support their registered charity clients by completing the T3010 return. In addition to the exposure and potential reputational risk associated with the T3010, there are many complexities, vagaries and pitfalls to be managed in the preparation process. While much of the financial information may be drawn from financial statements, some financial data requires detailed analysis and reclassification in order to complete the form appropriately.

This session will review how to properly complete the T3010 return, and minimize the risks and exposure associated with it, for both charity and accountant alike.

2 Valuation For Private Companies
Howard E. Johnson, FCPA, FCA, FCMA, Managing Director, Veracap M&A International Inc.

This session will examine the most common methodologies for valuing privately-held businesses, including the determination of cash flow, valuation multiples and balance sheet adjustments. It will also address valuation issues in the context of situations such as estate freezes, shareholder buyouts, shareholder disputes and matrimonial matters.

3 Powerful Pitch to Win Business
René Bertrand, Chief Consulting Officer, 3D Performance Consulting

Why do some firms have such a high pitch conversion rate? What is it that they know and others don't? Is it the process they follow, what they say or how they say it?

This session unlocks many of the secrets to successful pitching. We look at how to get the most out of every pitch opportunity, how to create powerful content and how to deliver a winning performance.

This session meets the needs of the first-time pitch team or the seasoned practitioner.

Saturday. September 19, 2015

4 HR Law Back-to-Basics: Why Employment Agreements and Workplace Policies are Critical to Business Success
Laura K. Williams, Principal, Williams HR Law Professional Corporation

In this practical, interactive session we will:

- Review why employment agreements are key tools to set and manage expectations in the employment relationship, and reduce risks and exposures
- Explore seven common pitfalls that undermine the enforceability of employment agreements
- Examine recent employment law trends that make the need for certain agreement clauses and policies critical
- Identify ten "must have" workplace policies which are key to communicating workplace standards and protecting business interests
- Explore strategies and best practices to effectively implement agreements and workplace policies

4 – 5 p.m.
Panel Discussion

To Be Announced

6:30 – 9 p.m.
Networking Reception and Dinner

7:30 – 8 a.m.
Networking Breakfast

8 – 9 a.m.
Keynote Address: To Be Announced

9 a.m. – 11:30 p.m
Concurrent Sessions (Select One)
includes a 30-minute networking break at 10 a.m.

1 Topic To Be Announced
Gigi Dawe, Leader, Corporate Oversight and Governance, CPA Canada

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Saturday. September 19, 2015

2 Tax Update – Preparing for an HST Audit
Diane Gaudon, FCPA, FCGA,
President, Diane Gaudon FCGA

With dedicated GST/HST auditors, the CRA has increased its audit activity over the years. It is vital that practitioners know trending audit exposures and the most important tips and traps.
This session will provide a GST/HST and QST update along with a review on how best to prepare for a GST or QST audit. Diane Gaudon will also share insights on creating a pro-active approach before, during and after the audit.

3 Speaker To Be Announced

11:30 a.m. – 1 p.m.
Working Lunch and Closing Keynote Address: Commanding Presence: What to Do When it's All Up to You
John Plank, President, Commanding Presence

All of your marketing skill and ingenuity, your strategies, your hard work and perseverance get you in front of your potential client. The stakes are high and now it's all up to you and your personal performance.

In this entertaining and intense keynote address with internationally-acclaimed Presentation coach John Plank, you will learn the secrets of gaining the trust of potential new clients. You will learn how to develop your own unique presence – how to relax and deliver sincere, natural marketing presentations, one to one or to large and small groups. During the session you will learn how to:

- **Acquire Commanding Presence** — control and motivate your listeners in small or large groups
- **Make powerful first impressions** — make sure your first 60 seconds gets everyone on your side
- **Develop charisma** — the secrets of creating a compelling and lasting impression
- **Conquer performance anxiety** — fear of presenting can kill your presentation — learn how to manage your nerves with the ingenious "Commanding Presence" techniques
- **Develop the full power** and range of your natural voice
- **Respond to tough questions** — create your own library of powerful and eloquent statements to make sure you don't blow it in the last ten minutes!
- **Think on your feet** — use the Commanding Presence "Focus" method to respond immediately, powerfully and eloquently to any question or request for information
- **Use body language** — priceless tips on how to convey your confidence and your integrity with a strong and natural physical presence
- **Practice for perfection** — prepare yourself and others to guarantee you will always have successful presentations

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General Information

Fee

CPAs and CPA Students:
Full Conference: $840+HST
Personal Passport: $607.50+HST
Organization Passport: $720+HST

Non-Members:
Full Conference: $940+HST

Delegate registration fees for the conference includes all sessions, session materials, refreshments and meals.

How To Register

Register online: **pd.cpaontario.ca**

Confirmations

A confirmation email will be sent to you the week of the conference. Please ensure your email account is up to date.

Cancellation Policy

Delegates may withdraw from the conference up until **September 4, 2015** and receive a credit memo on their PD account. A withdrawal fee of $50 will apply. After **September 4, 2015**, delegates will receive no credit for cancelling. Delegates may send a substitute in their place at any time.

Other Information

Recommended dress is business casual.

If you require special accommodations or have dietary restrictions, please include applicable details on your registration online.

Continuing Professional Development (CPD)

Attendance at the full conference may qualify for 14 CPD hours.

Accommodations

Guests can call 1-800-669-5501 for group reservations before **July 31, 2015**, and ask for the Chartered Professional Accountants room block and you will receive the discounted rate of $130 per night. Reservations made after this date will not be guaranteed at the group room rate.

Check-in time is 4:00 p.m.
Check-out time is 12:00 p.m.

Parking

Free parking is available at the Nottawasaga Resort & Conference Centre.