CPA Saskatchewan Public Practitioner Education Week

From September 18 to 22, 2023, CPA Saskatchewan will host our inaugural Public Practitioner Education Week! This week will include ten half-day sessions and two free lunch presentations which are focused on the needs of public practitioners. Registrations will be per session, allowing you to pick what is most relevant to you and what fits within your schedule. You can search for the sessions being offered by selecting “Public Practitioner Education Week” located under the Level search function on our CPA SK PD and Events page.

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<th>September 18</th>
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<td>Managing Risks of a Public Accounting Practice *</td>
<td>ASPE Update 2023</td>
<td>ChatGPT for Accountants</td>
<td>How to Build an Ethical Culture</td>
<td>How to Become a More Likeable Boss</td>
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<td>Leading People and Culture in Today’s World of Work</td>
<td>Tax Effective Compensation for Owners and Employees</td>
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<td>Presented by: Brett Elmgren</td>
<td>Presented by: Doug Buss</td>
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<td>Quality Management Workshop for Non-Assurance Practitioners</td>
<td>Performance Management</td>
<td>Addressing Chronic Stress and Burnout in the Accounting Profession</td>
<td>Audit Update 2023</td>
<td>Audits – Understanding the IT Implications of CAS 315</td>
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* Managing the Risks of a Public Accounting Practice is offered at a discount with all registration proceeds from this session being donated to the CPA Saskatchewan Scholarship Fund Inc.
Course Descriptions

Addressing Chronic Stress and Burnout in the Accounting Profession
In this session, you will leave with simple tools and practices that will help CPAs deal with the overwhelming and reduce stress. The constant addition of more laborious processes, unachievable expectations, overwhelming workloads and playing a game that many days you feel like you can never win, wears on even the hardiest of professionals.

ASPE - Update 2023
This seminar is for participants who want to keep up with accounting standard changes and projects. It will review recent revisions to Part II - Accounting Standards for Private Enterprises (ASPE), starting with an overview of the changes, followed by specific examples detailing their implementation. In addition, participants will receive practical guidance on common deficiencies in ASPE financial statements.

Audit - Update 2023
Auditors require continual knowledge of changing standards and practice issues. This seminar reviews recent revisions to the CPA Canada Handbook – Assurance and other practice matters that have occurred over the last year.

Audits – Understanding the IT Implications of CAS 315
A key revision to CAS 315 included a modernized approach to recognize the evolving environment, including in relation to IT. But what does that mean and how can the auditor gain an understanding of the IT environment with no formal training in IT? This course will give you a foundation of knowledge to understand IT and how it can contribute to the risks of material misstatement within financial statements.

How to Become a More Likeable Boss
Becoming a more likeable boss can sometimes be a difficult process to describe. It can be one characteristic that facilitates great communication and great employee relationships. It can be the special way that you show confidence in among your team. These and other events can become more easily managed with this great workshop. Learn how important it is to develop better managerial skills.

ChatGPT for Accountants: Introduction
Unlock the game-changing potential of ChatGPT for accountants! Discover the explosive frontier of AI-driven conversations and their unique benefits for analytical and advisory roles. Seamlessly integrate this versatile AI tool into various platforms, expanding horizons for interactions with artificial intelligence. Don't miss out on this opportunity to stay ahead in the evolving world of AI and accounting!

How to Build an Ethical Culture
This session focuses on the tools and techniques needed to build and maintain an ethical culture. There is more to an ethical culture than establishing a code of conduct and a statement of organizational values. It’s about ensuring that “tone at the top” is consistent with “tone at the middle”.

**Leading People and Culture in Today’s World of Work (Free Lunch Presentation)**

Today’s world of work is rapidly evolving, bringing forth new challenges and opportunities for businesses who aspire to align people and culture with their business strategy. In this highly engaging talk, we will explore how employees are feeling and reacting to the current organizational climate. Once understood, we will introduce practical strategies for how we can navigate, support and lead in a way that inspires, engages and motivates employees. Leadership is defined by impact and influence, not title or hierarchy, and this talk will provide practical approaches that anybody can apply, regardless of their role, to thrive in today’s world of work.

**Managing the Risks of a Public Accounting Practice**

Operating a CPA firm is more complicated than ever – members licensed for public practice need to be aware of the risks and learn how to avoid being on the wrong end of a lawsuit!

**Performance Management**

In this interactive course we give leadership and managers a different paradigm for employee performance as well as a suite of tools to help them have candid, affirming conversations with their direct reports. By recasting the often fraught and ineffective performance review process as a stewardship obligation Managers have to grow and develop their people, leaders have powerful lever to create a more transparent and accountable culture that in turn engenders more discretionary effort, ultimately retaining and attracting an unfair share of the top half of the labour pool.

**Quality Management Workshop for Non-Assurance Providers**

This course will assist firms that practice exclusively in the non-assurance area to understand, apply, and document its System of Quality Management (“SOQM”) in accordance with the new standard CSQM 1.

**Tax Effective Compensation for Owners and Employees (Free Lunch Presentation)**

COVID changed everything. It is now harder to attract and retain employees. Employees want to know that you care, and you understand their needs. Total compensation packages can help you provide the options that your employees are looking for.
Instructor Bios

Andrew Behnke
Andrew K Behnke, CPA, CA, CIA, CISA, CRISC, CISSP is currently assisting various clients as an independent consultant with cyber security, internal audit, and risk planning as well as execution of specific audits. 1.5 years as an Assistant Vice President within the internal audit department of one of Canada's largest multinational insurance companies with responsibilities over Canadian operational audits and Global Canadian SOX testing. 7 years as the Director of IT Risk and Assurance for Canada's national airline with responsibilities for all IT-related Internal Audit and data analytics. Sixteen years of experience within Big 4 with a focus on risk consulting including Internal Audit.

Jane Bowen
Jane M. Bowen, FCPA, FCA has been involved in professional development and education for Members and students for many years. She currently lectures in financial accounting and audit at Ontario Tech University in Oshawa. She authors or mentors courses in this professional development program, and has contributed to CPA Canada publications: Guide to Accounting Standards for Private Enterprises (GASPE); and Guide to International Financial Reporting Standards in Canada. In addition, Jane often authors publications issued by CPA Canada’s Research Guidance and Support Group, addressing the implementation of new accounting and assurance standards.

Examples of publications Jane has authored with CPA Canada include the following:

- Review Engagements:
  - Guide to Review Engagements
- ASPE Briefing: Amalgamations of Wholly-owned Enterprises
- ASPE Briefing: Accounting for Investments
- ASPE Briefing: Section 3462, Employee Future Benefits: A Focus on Defined Benefit Plans
- Alert and Briefing for Reports on Supplementary Matters Arising From an Audit or a Review Engagement (CSRS 4460)
- Alert and Briefing for CSAE 3530, Attestation Engagements to Report on Compliance and CSAE 3531, Direct Engagements to Report on Compliance
- Alert, Briefings and Implementation Tool Compilation Engagements
- Implementation Tool: Quality Management Standards

Doug Buss
Doug is the owner and President of YourStyle Financial Inc. He is an energetic speaker who truly cares and loves to help business owners, their employees and families to achieve their dreams. “We all have goals, whether financial, educational, spiritual or physical. A balance between these goals is what is important – to you, and to me! My purpose is to develop a Personalized Financial Action Plan that lays out your personal objectives so that you can achieve your goals and ultimately, your dreams”.

Celebrating 36 years in the financial services industry as a financial planner in Winnipeg, Doug and his team focus on the complete financial picture, not just investments. “I have encountered many different client situations, both business and personal, where I have called upon my knowledge and experience to provide unique solutions”.

We provide services to over 120 companies and 1,600 families spanning 4 generations across Western Canada. Registered and licensed from British Columbia to Ontario.

Patricia Dahm
Patricia is a legacy Chartered Accountant and has been in public practice in some capacity since 1985. Patricia has a diverse background, including being a practice reviewer for almost 13 years. She was an Associate Partner with Deloitte for five years. Her experience includes monitoring and implementation of quality control systems, technical assistance to engagement teams with respect to assurance, and ASPE and IFRS issues. She also has provided quarterly and annual financial statement assistance to a few public companies. Presently she has a small practice where she provides consulting services to various public accounting firms. Over the past several years, Patricia has authored CPA courses in the areas of ASPE and internal controls. She also teaches courses for CPA in the areas of IFRS, ASPE, auditing, review and compilation engagements and internal controls. Finally, Patricia is passionate about sharing her experiences with those wanting to enter the profession and teaches various fourth-level accounting and assurance courses at SAIT.

Malcolm D’Souza
Malcolm D’Souza has over twenty-five years of experience in resolving Accountants Errors and Omissions Claims. During that time, Malcolm has assisted over 10,000 accountants across Canada in resolving their claims.

In addition to his claims experience, Malcolm is a seasoned Risk Management Lecturer, currently teaming with CPA Canada, Provincial Bodies, Accounting Consortiums, and medium sized CPA firms to provide ten to fifteen risk management seminars annually to groups ranging from fifty to three hundred professionals.

Gord Dymtriw
Gord has spent 35 years in the sales and marketing arenas, retiring in 2022 from his day-to-day responsibilities as Chief Strategy Officer at Think Shift, an advertising agency based in Winnipeg, MB. Gord’s focus at Think Shift was working with clients to set strategic direction, develop brand strategies as well as assessing and ensuring their cultures were aligned and able to support.
While there’s a lot to the practice of ensuring a company’s culture can keep the promises its brand makes, it starts with helping Leaders be intentional about the kind of culture they want to nurture. Get that clear and you have the makings of a true work force - a force that works to deliver value for shareholders, employees, and customers.

Gord provides advice, tools and training in the areas culture development and implementation, leadership development, brand positioning and strategic planning.

- Organizational Narrative Development
- Brand Strategy and positioning
- Culture assessments
- Culture design and development
- Strategy and Planning facilitation
- Lumina Personality profiling and coaching

Brett Elmgren

Brett Elmgren is an Executive Human Resources professional and the President & Founder of Axom Leadership. His work focuses on inspiring people to create positive change in their organizations. Brett is a Chartered Professional in Human Resources with 15 years of HR leadership experience working for Federated Coop, Cameco & Nutrien. Most recently Brett held the position of Director of Talent Management for Nutrien, and was responsible for leading the HR integration during the merger of PotashCorp and Agrium. Brett holds a Master’s Degree in Leadership from Royal Roads University and an undergraduate degree from the University of Saskatchewan. Brett is born and raised in Saskatchewan on treaty six territory, and his family is proud to call Saskatchewan home.

John Grummett

John Grummett is a Tax Partner with Taylor Leibow. He is the leader of the Taylor Leibow tax group and,

- A member of the firm’s executive committee.
- Chair of the DFK Canada Tax Committee.
- A member of the DFK International Tax Committee.
- A member of the Institute of Chartered Professional Accountants of Ontario.
- A member of the Canadian Tax Foundation.

John obtained a Bachelor of Arts (Honours Chartered Accounting Studies) in 1989 and the Chartered Accountant designation in 1990. John has approximately 35 years of national and international tax experience in various industries. He has considerable experience in areas of personal and corporate tax planning, corporate reorganizations, and succession and estate planning.

John has presented various tax topics to organizations including the Ontario Tax Foundation. He has taught tax courses for AJAG Professional Development and other organizations including tutoring for the CICA In-depth Tax Course. John is Treasurer of the Niagara Estate Planning Counsel, and a board member of the Niagara Tax Consultation Group.
John resides in Beamsville, Ontario. John is the chair of the organizing committee for the Terry Fox Run in St. Catharines.

**Morgan Hamel**

Morgan is the President of MH Partners Inc., a boutique consulting firm adept at helping leaders and their organizations navigate a new era of stakeholder activism. With experience in corporate ethics (11 years in the ethics office of a large organization), academia (Master’s Degree in Applied Ethics from Utrecht University in the Netherlands) and ethical entrepreneurship (founded an ESG-centric ethical fashion marketing company that generated $1M in responsible sales in its first corporate year), Morgan offers clients a business-focused, ethics-rooted perspective on reputation management that doesn’t exist elsewhere.

**Monique Levesque-Pharoah**

Monique Levesque-Pharoah is the owner of Unique Communications & Training. A highly experienced presenter and facilitator, Monique uses her energetic approach and real-life workplace situations to bring training alive. Participants regularly comment on her ability to make training fun and meaningful. She holds a Certificate in Human Resources Management (Honours) and is a certified mediator through Mediation Services Manitoba. Monique has professional experience in employee development, communication & leadership and enjoys working with organizations and leadership teams on conflict strategies.

Monique served on the Toastmasters International Board of Directors from 2016-2018 helping to set the strategic direction for this world-wide organization. As Director of Partnerships & Events for the Health Sciences Centre Foundation she enjoys working with organizations dedicated to providing tomorrow’s health care today. Monique is currently serving on the national Canadian Mental Health Association (CMHA) and serves as Board Chair for CMHA Manitoba & Winnipeg.

**John Oakley**

As Vice-President of Taxation, John leads CPA Canada’s Tax group, which influences the development of an equitable, effective, and efficient tax system in Canada, as well as delivers practical information and fresh perspectives on tax to members and the broader tax community.

A strong proponent of tax education, John also aims to increase CPA Canada’s reputation as the preeminent provider of core tax education in Canada. John serves as a spokesperson for CPA Canada, both domestically and internationally, and acts in the public interest, providing tax-related information and perspective. He leads committees and working groups, consulting with the federal government regarding the development and administration of federal tax policies, while also providing thought leadership and education to CPA members.
Previously, John was Baker Tilly Canada's National Tax director, driving key tax advisory initiatives to support practitioners across its network. An accomplished leader and trusted advisor, John also provided tax training to other professionals through various organizations, including the Canadian Tax Foundation, CPA Nova Scotia, and CPA Canada.

John has written and presented numerous articles and papers over his career and has presented at many national conferences, including several Atlantic Tax Conferences. During the pandemic, John wrote many tax related articles pertaining to government relief measures and legislation.

Professional Designations & Education:
- Chartered Professional Accountant
- Trust and Estate Practitioner
- Competent Communicator
- Atlantic School of Chartered Accountants
- Bachelor of Commerce, Saint Mary’s University

Professional Affiliations
- Member, CPA Nova Scotia (CPA NS) and CPA Canada
- Member, Canadian Tax Foundation
- Member, Society of Trust and Estate Practitioners
- Committee member of CPA NS complaints committee
- Member, Program steering committee for the Atlantic Provinces Tax Conference

Scott Orth
Scott is a mindfulness coach and trainer, who gives busy professionals the tools they need to delete the overwhelm, focus on what matters most and create the life they want. He gives them strategies to respond to the challenges in their day more mindfully, allowing them to be more focused, productive, and happier.

He uses these tools every day in his own life and brings a practical, no-nonsense approach to it all. Scott is happily married to Meghan, is an engaged father of a 16-year-old son (Noah) and 14-year-old daughter (Kayla). He is a constant reader, avid mountain biker, passionate espresso maker and lover of craft-brewed IPA’s.

Kim Varey
Kim has instructed a wide range of courses in financial accounting, assurance, management and leadership for Canadian accounting associations, the CA and CPA Western Schools of Business, Mount Royal University, AuditWatch and directly to firms and public companies. In addition to teaching, she provides consulting services on effective business management and technical review in IFRS and ASPE. Kim began her career with eleven years in public practice, serving owner-managed business, public companies and not-for-profits. Kim is extensively involved with Calgary and Foothills Search and Rescue and has served on the Board of Foothills Land Trust.
Garrett Wasny, MA, CMC, CITP/FITP, is a Certified Management Consultant (CMC) and award-winning artificial intelligence (AI) skills advisor to accountants worldwide. His roles include webinar producer, Internet speaker, author, AI app developer, professional development leader, and former management consultant for Price Waterhouse. He's published 50+ ebooks on accounting technology and ethics, written hundreds of articles and columns on Internet strategy, and delivered thousands of seminars and webinars to CPAs and accounting organizations in more than 40 countries.