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MENTAL HEALTH MATTERS

Find tips for CPAs to manage stress, avoid burnout and promote well-being in your office

MEET MEGAN EVANS

Governor General's Gold Medal winner for the highest standing in Canada on the September 2023 CFE



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CPA SK MISSION

CPA Saskatchewan enhances the influence, relevance, and value of the Canadian CPA profession by enabling economic and community development through:

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- Supporting its members and candidates
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The Canadian CPA is the pre-eminent, globally respected business and accounting designation.

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- Innovation
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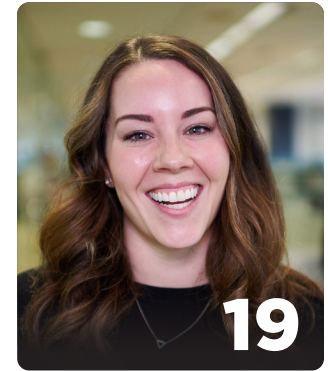
WHAT DO YOU THINK?

Send your letter to the editor to phoffart@cpask.ca or by mail to CPA Saskatchewan. Letters may be edited for length and clarity.

LAND ACKNOWLEDGEMENT

We live and work on lands covered by Treaties 2, 4, 5, 6, 8, and 10. These are the territories of the Anihšīnāpēk/Saulteaux, Dakota, Dene, Lakota, Nakoda, nēhiyaw/Plains Cree, néhinaw/Swampy Cree, nehithaw/Woodland Cree, and Stoney Nations. They are also the homeland of the Métis/Michif Nation. We pay our respects to the First Nations and Métis ancestors of this place and reaffirm our relationship with one another.

We respect and honour the Treaties that were made on all territories, we acknowledge the harms and mistakes of the past, and we are committed to moving forward in partnership with Indigenous Nations in the spirit of reconciliation and collaboration.



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CALL FOR AUTHORS

Interested in submitting an article for a future newsletter? Please contact Pam Hoffart, Communications and Events Coordinator for CPA Saskatchewan at phoffart@cpask.ca.



NOTES FROM YOUR LEADERSHIP

BOARD CHAIR & CEO REPORT



Paul Lepage CPA, CA, CBV
Chair of the Board, CPA Saskatchewan

The months ahead are a hectic time for many of us. With year-end deadlines, tax season, and personal and family obligations, taking a break can feel like an unsurmountable task on our already long to-do list. This issue of CPA SKConnect includes some resources to assist you in managing stress, avoiding burnout, and promoting well-being in your office. Mental health and wellness support is available to our members, candidates and their immediate families through the CPA Assist program, which offers free counselling and 24/7 crisis support. We urge you to utilize this free, confidential service to support your mental health or wellness journey and to take advantage of their free monthly webinars.

In November, CPA Saskatchewan celebrated the achievements of four exemplary CPAs—Sheila Filion, FCPA, FCA; Keith Martell, FCPA, FCA; Erin Campbell, CPA; and Aaron Picton, CPA—at our annual Member Recognition Gala. It was a great occasion to connect with colleagues and friends to celebrate our profession, as you will see from the photos later in the newsletter. If you know a CPA deserving recognition for their excellence, you can nominate them for our 2024 Member Recognition Awards until May 15, 2024.



Shelley Thiel FCPA, FCA
CEO, CPA Saskatchewan

Many exciting events are coming up over the next few months that will give us the chance to connect with each other. We are eager to celebrate with Saskatchewan's 135 successful May and September 2023 CFE writers and their supporters at Convocation on March 9th in Regina. We also invite you to join us at the 2024 CPA Prairie Connection Conference on May 28-29, 2024, co-hosted with CPA Manitoba at TCU Place in Saskatoon. This conference will offer a variety of learning and networking opportunities for both in-person and virtual attendees. We received positive feedback from over 600 CPAs across Saskatchewan and Manitoba who attended our 2023 conference, and we hope you will sign up for the 2024 Conference when registration opens—stay tuned for more details!

All members are encouraged to consider serving the profession by running for the CPA Saskatchewan Board, which has two upcoming vacancies for 2024/25. The nomination period begins on April 25, 2024, and will close on June 4, 2024, at 4:30 p.m. Serving on the Board provides an excellent opportunity to utilize your knowledge and skills to help shape the future of the profession in Saskatchewan.

Together, we continue to work with our provincial and national colleagues as we explore new ways to collaborate. Although there is uncertainty around us, CPA Saskatchewan continues our commitment to protecting the public through regulation in Saskatchewan and building a stronger CPA profession in Saskatchewan.

CALL FOR BOARD NOMINATIONS

Nominations for election to the CPA Saskatchewan Board for 2024-25 will open on Thursday, April 25, 2024, and must be received by the Chief Executive Officer of the Institute by 4:30 p.m., C.S.T. Tuesday, June 4, 2024. Nominations must be in writing, signed by two members, and agreed to by the nominee.

We have a seat to fill and
we're looking for **you!**





2024

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*All registration options include access to watch all sessions on demand for one month post-conference.

CPA SASKATCHEWAN MEMBER RECOGNITION GALA

On November 24th, CPA Saskatchewan hosted our annual Member Recognition Awards Gala at the Conexus Arts Centre in Regina. With nearly 100 attendees, the evening was a wonderful opportunity to celebrate our profession and recognize the contributions of our outstanding members and Regulatory Committee Volunteers.

This year, we were honoured to be able to recognize four individuals who have contributed to the profession and community. Sheila Filion, FCPA, FCA (Virtus Group LLP) and Keith Martell, FCPA, FCA (recently retired President and CEO of the First Nations Bank of Canada), were presented with Fellow Chartered Professional Accountant (FCPA) certificates. Throughout the course of their careers, both have set a shining example of the impacts CPAs can make in business and our communities—congratulations on this well-deserved achievement!

We were also pleased to present our first-ever Early Achievement Awards to two members who have already made an impact early on in their careers—Erin Campbell, CPA and Aaron Picton, CPA, both from Deloitte LLP. We are excited to see the many contributions you will both continue to make throughout your careers—congratulations!

For more information about this year's recipients and their involvement in the profession, community, and success as CPAs, visit our [website](#).

If you know a CPA deserving of recognition, let them know how amazing they are by downloading a [nomination form](#) for CPA Saskatchewan's Member Recognition Awards today! Nomination categories include FCPA, Early Achievement, and Lifetime Achievement Awards.



Left to right: Keith Martell, FCPA, FCA; Erin Campbell, CPA; Aaron Picton, CPA; and Sheila Filion, FCPA, FCA.



Paul Lepage, CPA, CA, CBV, with FCPA recipient, Sheila Filion, FCPA, FCA



Leigha Hubick, CPA, CA
Registrar of CPA SK



Paul Lepage, CPA, CA, CBV, with FCPA recipient, Keith Martell, FCPA, FCA



Paul Lepage, FCPA, FCA, CBV, with Early Achievement Award recipient Aaron Picton, CPA



Paul Lepage, CPA, CA, CBV, with Early Achievement Award recipient Erin Campbell, CPA



Regulatory Committee Volunteers and Board Members (left to right): Jeffrey Hansen, CPA, CA; Bev Betteridge, CPA, CMA; Paul Lepage, CPA, CA, CBV; Sheila Filion, FCPA, FCA; Trevor St. John, CPA, CA; Helen Sukovieff; Jolene Anton, CPA, CA; Erin Campbell, CPA

MEMBER RECOGNITION AWARDS

Do you know an outstanding CPA deserving of recognition?

Nominate them for a Fellow Chartered Professional Accountant (FCPA), Early Achievement, or Lifetime Achievement Award today!

Visit www.cpsk.ca to download the nomination package
and complete your submission by May 15, 2024.

CONGRATULATIONS TO SASKATCHEWAN'S SUCCESSFUL CFE WRITERS

Congratulations to Saskatchewan's 98 Successful September 2023 CFE Writers!

Please visit the CPA Saskatchewan website to view the listing of [successful candidates](#) from the September 2023 Common Final Examination (CFE).

To earn CPA designation, all candidates must pass the CFE and complete the practical experience requirements. The national CFE ensures all Canadian CPAs meet the same nationally and internationally recognized high standards expected of the designation.

Two CPA Saskatchewan candidates demonstrated exceptional skill and earned recognition on the September 2023 National Honour Roll, Megan Evans and Brittney Hubenig.

Saskatchewan's Megan Evans was also awarded the prestigious Governor General's Gold Medal for the highest standing in Canada on the September 2023 CFE, making this the second such award for a Saskatchewan Candidate.

We look forward to celebrating all of our successful 2023 CFE writers at [Convocation](#) on March 9, 2024, at the Queensbury Convention Centre in Regina!

CONGRATULATORY MESSAGE FROM CPA SASKATCHEWAN

"Congratulations to the 98 Saskatchewan writers on the September 2023 CFE. It takes tremendous dedication, perseverance, and hard work to achieve this milestone in your journey to becoming a CPA; this is an accomplishment you should be very proud of.

We want to congratulate Megan Evans and Brittney Hubenig, as their exceptional performance earned them recognition on the National Honour Roll.

CPA Saskatchewan is also delighted that Saskatchewan candidate Megan Evans has been awarded the prestigious Governor General's Gold Medal for the highest standing in Canada on the September 2023 CFE—congratulations on this tremendous achievement!

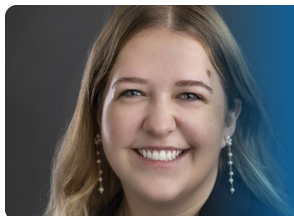
The CPA Saskatchewan team wishes all successful candidates continued success as you embark on the next phase of your careers!"

—Shelley Thiel, FCPA, FCA, CEO of CPA Saskatchewan

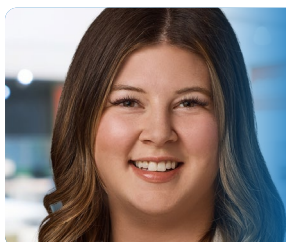
CONGRATULATORY MESSAGE FROM THE CPA WESTERN SCHOOL OF BUSINESS

"I am deeply honoured to celebrate the remarkable success of the 98 dedicated candidates from Saskatchewan who have brilliantly navigated the complexities of the 2023 September CFE. Their exceptional results demonstrate their robust technical expertise and highlight the cultivation of vital professional competencies essential for their future endeavours," stated Yuen Ip, MBA, CPA, CMA, PMP, CEO of the CPA Western School of Business.

"On behalf of our team at the School, I am delighted to offer my sincere congratulations and best wishes to these exceptional individuals as they progress in their professional journeys. Your perseverance and accomplishments stand as a powerful demonstration of your steadfast dedication. We look forward with great anticipation to your future contributions and successes in the field."



"I am extremely honoured to be recognized as the Canadian Gold Medalist for the September 2023 CFE. Thank you to MNP, my instructors from the MPAcc program, and my friends and family—I would not have been able to achieve this without your unwavering support!"
—Megan Evans, MNP LLP



"It is extremely rewarding to be recognized on the honour roll for the September 2023 CFE. This accomplishment would not be a reality without the support of my husband, family, friends, mentors and employer. A special thank you to my mom, who is a member of the CPA profession, who inspired my career in accounting and whose dedication to the profession has inspired my hard work."—Brittney Hubenig, MNP LLP

CANDIDATE PROFILE: MEGAN EVANS

SEPTEMBER 2023 GOVERNOR GENERAL'S GOLD MEDAL RECIPIENT

For the second year in a row, a Saskatchewan candidate has been awarded the Governor General's Gold Medal for the highest standing in Canada. Megan Evans of MNP LLP in Prince Albert received the highest standing on the September 2023 CFE out of 4,178 successful writers—an immense accomplishment deserving of recognition!

Megan began her university career at the Edwards School of Business with a plan to attain a business degree in management and open her own business one day. However, during her second year, an Introduction to Financial Accounting class prompted her to change course and major in accounting. Megan is now a Senior Accountant with MNP LLP, where she particularly enjoys helping small businesses and NPOs (non-profit organizations).

While at the U of S, Megan was involved in JDC West as Co-Chair External, leading the Organizing Committee for the 2023 JDC West Competition. She was also part of the JDC West Team as an accounting delegate, Corporate Relations Director for the Edwards Business Students Society, Director of the Edwards Case Competition and Academic Partnership Appreciation Night, and Greystone Scholars Society as a tutor and tutor coordinator.

After completing her degree in 2022, Megan immediately returned to complete her Masters of Professional Accounting degree (MPAcc), which she completed in August 2023. Starting her career at MNP LLP through a co-op term in 2021, Megan has remained in Assurance and Accounting, working on audits, reviews, compilations, and the associated tax work throughout her career so far. In her downtime, she enjoys spending time with her family and friends, reading and baking.

CPA SK: What do you like most about the work you do?

ME: I think this is a relatively common answer, but I like the fact that every day is different—whether it's the type of work I am doing, the clients I am working with, the team I am working with, or something else, every day is different. I enjoy that the work is challenging and allows me to learn something new every day and that there is a lot of problem-solving involved in the work I do.

I also like the types of clients I work with—particularly small businesses and NPOs—I enjoy being able to interact with clients, knowing that I am helping them with their businesses.



CPA SK: What was your reaction when you found out you had achieved the highest standing in Canada on the September 2023 CFE?

ME: When I first found out, I felt relieved to find out I had passed, and then shocked, overwhelmed, and at a loss for words when I found out I had achieved the highest mark in Canada.

I think everyone has a similar feeling when they finish writing the CFE—you have no idea how you did—there is underlying stress until results day, so finding out I had not only passed but achieved the national gold medal was an unforgettable feeling.

CPA SK: Can you tell us about the study strategy you used to prepare for the CFE and what you feel made it successful?

ME: When studying for the CFE, I only worked from about 8 am to 5 pm each day, which ensured that I took breaks throughout the study period and gave myself time to relax. This allowed me to start each day refreshed and relaxed. It also made my study days more productive and focused as I was limited in the amount of time I allowed myself to study each day.

I always did an hour of technical studying each day—I kept a list of areas that I felt I needed to gain a better understanding of and used this during my technical study to focus on areas where I was weaker.

I also kept track of the things that I was doing well, which helped me stay motivated, and I made a list every morning of things I wanted to work on that day—usually related to case writing or a specific technical topic. Setting goals each day and tracking what I was doing well and what I needed to work on allowed me to feel confident as I could see my progress, and it helped to reduce the stress I was feeling as well.

Studying with a group of friends was also useful as it allowed me to talk through topics I found more difficult. The study strategies I used were similar to what I had used throughout university, which I knew worked well for me—I think continuing with these strategies that I knew had previously been effective allowed me to continue being successful in my studying.

CPA SK: Who supported you through your CPA journey, and how did they do that?

ME: There were a number of people who have supported me throughout my CPA journey. My family and friends were always there for me, whether it was just listening to how studying was going or checking in on me. My employer, MNP, supported me throughout the CPA journey by allowing me to take time off work for the MPAcc program, checking in throughout the study period, and providing me with a ‘CFE Mentor’ who was able to answer all of my questions leading up to the CFE. My instructors from the MPAcc program were also very supportive, not only teaching me everything I needed to be successful but taking the time to answer all of my questions to allow me to better understand the material.

CPA SK: What advice would you give to future CFE writers?

ME: When writing the CFE, one of the most important pieces of advice I received was to ensure that your performance on the CFE can match your potential. Everyone writing the CFE has the potential to be successful—we have learned the required technical material and done all of the studying we can. On the CFE, you need to ensure that your performance matches that potential—therefore, it’s crucial to look after yourself, mentally and physically, leading up to the CFE so that you are in the best position to write. In addition, I think it’s valuable to determine why you want to pass the CFE—find a reason, such as furthering your career, and write it down.

CPA SK: Now that you have achieved the highest standing in Canada, what’s next for you? Where do you see your designation taking you in the future?

ME: I enjoy the work I am doing, so I intend to continue in public accounting and hope to continue to learn new skills and eventually reach the partnership level in the future.

I think it is meaningful to give back to the community where possible as I have received a lot from the community, such as time or donations, in events I have been part of. I think it’s also important to share the knowledge that I have gained with others who could benefit from it. Volunteering also gives you a greater understanding of the community, and I would like to eventually join the Board of a not-for-profit organization.

SPRING RENEWAL STARTS IN APRIL 2024

The deadline to complete Spring Renewal is April 30, 2024.

All CPAs are required to complete an annual renewal of member registration with CPA Saskatchewan. The renewal cycle begins in April of each year. The renewal cycle encompasses the declaration of Continuing Professional Development (“CPD”) activities from the previous year, updating contact information, confirming compliance with the Rules, and submitting payment of fees.

The renewal can be completed online through the [member portal](#) and is due April 30 to ensure your CPA designation remains in good standing with CPA Saskatchewan. If your renewal is not completed by this date, your standing with CPA Saskatchewan will be In Default, and you will be notified of your non-compliance with the applicable Bylaws.

Your member portal login is your preferred email address in our records. If you have forgotten your password, click the “Forgot password” link on the login page to reset your password.



If you need to change your preferred email address, please email registrar@cpask.ca and include your CPA Saskatchewan member ID for verification purposes.

Once you’ve completed all steps in April, invoices and receipts are available online through the [member portal](#). CPA Saskatchewan staff cannot accept payments by credit card over the phone or provide copies of invoices or receipts.

For more information on Spring Renewal, please [visit our website](#).

LONG HOURS, DEADLINE PRESSURE

TAKE TOLL ON ACCOUNTANTS: STUDY

Denise Deveau

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A new report shows that slightly more than half of accounting professionals have experienced a mental health issue at some point in their lives.

Accounting professionals are no strangers to mental health issues. As workplace demands grow, a recent research [report from the Healthy Professional Work partnership](#) shows that slightly more than half of accountants responding to a 2021 survey report have experienced a mental health issue at some point in their lives.

Merridee Bujaki, FCPA, is a professor of accounting at the Sprott School of Business at Carleton University and co-author of the report, along with colleagues Suzanne Paquette, CPA, at the School of Accounting, Faculté des sciences de l'administration, Université Laval, and Darlene Himick, CFA, at the University of Ottawa's Telfer School of Management.

Here, she provides her insights into mental health issues in the accounting profession as well as highlighting some key findings from their research.

CPA CANADA: How did this research come about?

MERRIDEE BUJAKI (MB): The original idea came from earlier work I had been doing in the area of women academics. I was struck by the number of women who experienced health issues that had a psychosomatic component. Over time, we became interested in expanding that research to other select professions. We reached out to CPA Canada to include accountants in the seven professions we wanted to cover. The others were doctors, teachers, academics, nurses, midwives and dentists.

CPA CANADA: Why do you feel accounting professionals have been overlooked from a mental health perspective?

MB: Stress and burnout have been longstanding concerns within the accounting profession, as they directly link to turnover and the intention to leave organizations. This is particularly prevalent in auditing and public accounting. Many feel these issues are not being addressed enough.

Part of the reason accounting professionals may have been overlooked from a mental health perspective is that the accounting profession is built on masculine norms and a

cultural expectation that you just have to tough it out. Also, mental health is often misunderstood as a sign of individual weakness. Therefore, it was not something people wanted to talk about.

CPA CANADA: What are some of the key highlights that stood out for you from the research?

MB: I was impressed by the insights offered by the members of the profession we spoke to during the interview phase. In most cases, they were passionate about the profession, but recognized the challenges that might exist from a mental health perspective.

For the most part the challenges they faced were around stress, anxiety and burnout, which can ultimately lead to depression if they are not dealt with. The levels may differ between employers, but many of the challenges appear to be systemic and stem from the nature of the work, the way roles are set up, the evaluation and compensation models, and work expectations.

The culture of accounting is one that is characterized by long hours. Some talked about putting in up to 100 hours a week during the busiest time of the year. These long hours by themselves are not necessarily a problem. Most people can find a way to cope with the long hours, knowing it tends to be cyclical. In fact, our research showed that about 80% of respondents agreed their work stress is impacted by accounting cycles or time of year.

What is concerning, however, is that we are hearing from people that they had no opportunity for downtime or to reset from these long hours, and their work has only become busier and busier. We were told that in some cases, vacation plans are not being respected, and people are expected to be available at any time.

CPA CANADA: What are the prevailing types of mental health issues experienced by accountants?

MB: As mentioned, stress, anxiety and burnout are the major ones, but in our research, responses ranged right up to some very serious issues causing hospitalization, and suicidal ideation and attempts.

It was also interesting to learn about the number of people who go to work when not feeling well mentally. This presenteeism, in which people are present but not functioning in an optimal way, is definitely a concern.

CPA CANADA: What are the most common sources of stress that are unique to the accounting profession?

MB: Apart from workload and deadline stress, the pandemic also brought a lot of additional digital stress and the expectation that people would be available all the time to their clients and colleagues.

CPA CANADA: Are there any differentiators of note in areas such as gender, type of practice, age, etc.?

MB: In the intersection of professional, social and family expectations, women continue to do the bulk of the care work, whether it be for elderly parents or younger children. That was only exacerbated during the pandemic. The combination of high demands at work and at home is problematic.

I was also struck by comments from some women who reported physical health challenges that have a mental health dimension that may make it more challenging for them to work, such as postpartum depression or menopausal changes. These are issues that men would not experience.

Depending on their cultural background, some individuals also found it difficult to meet family or cultural expectations for high levels of family involvement while also working long hours.

Younger accountants, for their part, were concerned about working and pursuing their professional designation while coping with the added stress of exams and courses. It's a challenging time for them and usually happens when they are beginning to take on supervisory responsibilities.

CPA CANADA: When is accounting professionals' mental health most at risk?

MB: Based on our research, it tends to be either after a really busy time when they did not get an opportunity to reset or when they are dealing with unexpectedly high levels of personal demands, such as an illness in the family.

CPA CANADA: Are employers' attitudes changing?

MB: There is a greater interest in mental health today at a time when attracting and retaining professionals is becoming more challenging. Professionals today have other opportunities and are not shy about moving on to something else. Employers are starting to realize they need to listen and make sure they offer the kind of environment that will attract people and encourage them to stay.

REMINDER!

2023-24 PD Passports will expire on March 31, 2024. You still have time to use up your remaining credits! Search our [courses](#) to find the one that works best for you!

STAFF NEWS: FAREWELL TO GULRAIZ TARIQ, CPA

CPA Saskatchewan was sad to say goodbye to Gul on December 22nd. As Associate Director, Practical Experience, Gul promoted the profession to students and worked with employers and candidates on practical experience requirements. He will be greatly missed but CPA Saskatchewan wishes him and his family all the best as they begin a new chapter in Alberta!



CPA CAREER CONNECT

Connecting employers with qualified Chartered Professional Accountants across Saskatchewan.

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AICPA

The American Institute of CPAs® (AICPA) and its predecessors have served the public interest for 136 years. The Chartered Institute of Management Accountants® (CIMA) was founded in 1919 and has helped shape the profession for over a century. In 2017, we came together as AICPA & CIMA to forge a powerful international alliance that promotes accounting and finance in every corner of the world.



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DAVID TRAHAIR

David Trahair, CPA, CA, is a financial writer, trainer, and eLearning developer. His books include *Smoke and Mirrors: Financial Myths That Will Ruin Your Retirement Dreams*, *Enough Bull: How to Retire Well Without the Stock Market*, *Mutual Funds or Even an Investment Advisor*, *Crushing Debt: Why Canadians Should Drop Everything and Pay Off Debt*, *Cash Cows, Pigs and Jackpots: The Simplest Personal Finance Strategy Ever* and *The Procrastinator's Guide to Retirement: How You Can Retire in 10 Years or Less*. His personal finance eLearning development firm offers on-demand online courses through the CPA provincial bodies.



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GARRETT WASNY, MA, CMC, CITP/FIBP

Garrett Wasny's business and topic areas encompass a broad range of contemporary issues in accounting technology. His

Garrett Wasny
MA, CMC, CITP/FIBP

expertise lies in leveraging AI and digital transformation to enhance accounting practices. He provides strategic insights on the adoption of cloud computing, mobile technologies, and social media applications in finance. His educational content is designed to empower financial professionals with the skills and knowledge needed to navigate the rapidly evolving tech landscape in accounting. Wasny's work is recognized for its practical relevance and impact, aiming to bridge the gap between traditional accounting and modern technological advancements.

KURT ROSENTERTER, CPA, CA, CFP, CLU, TEP, FMA, CIMA, FCSI, CIM

Kurt Rosentreter is a certified financial planner committed to helping families manage their finances properly through information relevant to retirement income, personal financial planning, and wealth management. Kurt Rosentreter's webinars teach the basics of managing your own finances by reviewing the different planning areas and provide information on retirement cash flow considerations on retirement age, CPP, RRIF, income splitting, tax planning, estate factors, insurance, and real estate.

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UltimQuest Knowledge is a global education provider focused on corporate training for professional accountants.

ULTIMQUEST
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Our areas of focus span business ethics, governance across corporate, public, and not-for-profit sectors, as well as environmental, social, and governance (ESG) frameworks. Our approach is to develop highly interactive, engaging and problem-based training opportunities using timely and relevant case studies and real-world examples. We respect the years of experience and expertise that professional accountants possess and build upon their knowledge to broaden their horizons and develop new skills.

**THE MANDATORY TAGGING
PERIOD FOR ALL CPAS EXPIRES
NOVEMBER 10, 2024.**

Following this date, tagging your legacy designation becomes optional.

WHAT'S NEW IN ACCOMMODATING MENTAL HEALTH FOR EMPLOYERS?

Jana Linner, K.C., Robert Frost-Hinz, Allison Graham, Zoe Johansen-Hill

This article was written and originally published by MLT Aikins and has been republished by CPA Saskatchewan with permission.

Mental health accommodations can be some of the most complex accommodation requests arising in the workplace due in part to the complexity of the conditions themselves and the ever-evolving scientific understanding of mental health conditions. In this blog, we explore recent developments in accommodating mental health and cover the key changes employers should be aware of.

The number of mental health accommodation requests faced by employers in recent times has risen, partly due to the profound and diverse effects the COVID-19 pandemic has had on the mental health of employees through times of restrictions and lockdowns. Increased focus on and understanding of mental health issues generally has also resulted in a corresponding increase in employers' obligations to provide accommodation.

UPDATES TO THE DIAGNOSTIC AND STATISTICAL MANUAL OF MENTAL DISORDERS

One of the first guidelines to help employers determine when a mental health concern may qualify for accommodations on the basis of disability is the fifth edition of the Diagnostic and Statistical Manual of Mental Disorders (the "DSM-5"). Employers should note that the DSM-5 has recently been further updated with a text revision ("DSM-5-TR")^[1] to reflect developments arising since its original publication in 2013.

The changes implemented in the DSM-5-TR are mainly of a textual nature, as indicated by the title of the new edition. Many of the changes involve minor updates to make the text more precise, culturally sensitive or to clarify the criteria of certain disorders. However, there are a few additions and changes within the text revision edition that are notably different than the DSM-5.

Prolonged Grief Disorder is a newly recognized disorder added to DSM-5-TR as a condition in the main category of the text. This disorder is defined as "intense yearning or longing for the deceased (often with intense sorrow and emotional pain), and preoccupation with thoughts or memories of the deceased (in

children and adolescents, this preoccupation may focus on the circumstances of the death)."^[2]

Another change is the re-addition of Unspecified Mood Disorder to the DSM-5. DSM-5-TR clarifies that this classification will be used in situations where "the criteria are not met for a specific depressive disorder and includes presentations for which there is insufficient information to make a more specific diagnosis (e.g., in emergency room settings)."^[3] Thus, it seems as though Unspecified Mood Disorder is an interim diagnosis disorder until an individual's mental state can be fully investigated.

Although these changes are not as significant as arose between the fourth and fifth editions of the DSM, they are important for employers to understand when dealing with mental health accommodation requests in the workplace. For example, as a result of the amendment, Prolonged Grief Disorder and Unspecified Mood Disorder can be grounds for accommodation requests by employees in the workplace and may give rise to the duty to accommodate on the basis of disability.

EMPLOYEES MUST COMPLY WITH AN EMPLOYER'S REASONABLE REQUEST FOR MEDICAL INFORMATION

Notwithstanding the complexities in mental health in the workplace, the legal tests and principles governing an employer's duty to accommodate have remained fairly static over time. A critical component of the law from an employer's perspective is an employer's entitlement and obligation to request that the employee provide the medical information the employer requires to properly assess an accommodation request. Correspondingly, employees have an obligation to cooperate in the process and comply with an employer's reasonable request for medical information.

Recent arbitral caselaw continues to affirm the importance of the employer's entitlement to sufficient medical information in mental health accommodation cases and the limitation of the employer's duty to accommodate where such information is not provided.

Note: This article is of a general nature only and is not exhaustive of all possible legal rights or remedies. In addition, laws may change over time and should be interpreted only in the context of particular circumstances such that these materials are not intended to be relied upon or taken as legal advice or opinion. Readers should consult a legal professional for specific advice in any particular situation.

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BOOST TEAM WELLNESS THIS WINTER:

FUN ACTIVITIES FOR THE WORKPLACE

Steven Langer

As a wellness consultant, I'm passionate about helping individuals and teams thrive, even in the chilliest seasons. Winter is often associated with cold and gloomy weather, but it's also a fantastic time to boost team wellness in the office. Let's explore some enjoyable activities to keep your team engaged and motivated, even when the days are shorter and the temperatures drop.

GROUP WORKOUTS

Encourage your team to stay active this winter by organizing group workouts. You can bring in a fitness instructor for yoga, Pilates, or even a quick HIIT session. Alternatively, designate a space in the office for quick stretching breaks throughout the day. Regular exercise is known to enhance mood, reduce stress, and increase productivity.

1. **Weekly Yoga Sessions:** Bring in a certified yoga instructor for weekly yoga sessions that cater to all fitness levels. Yoga can help your team members stay physically active and reduce stress.
2. **Lunchtime Walk-and-Talks:** Organize brisk walk-and-talks during lunch breaks. Encourage team members to share their goals or challenges, making it a productive and active bonding experience.

HEALTHY POTLUCK LUNCHES

Winter is the perfect season for hearty, nutritious meals. Plan healthy potluck lunches where team members can bring in their favourite homemade dishes. It's a great opportunity to share recipes, bond over food, and make sure everyone is eating well during the winter months.

1. **Salad Swap:** Encourage team members to bring in various salad components. Everyone can mix and match ingredients to create their own customized salads.
2. **Soup Exchange:** Have a soup-themed potluck where team members bring in their favourite homemade soups. It's a comforting and nutritious way to enjoy winter lunches.

WINTER WALKS

Don't let the cold weather keep you cooped up indoors. Arrange winter walks with your team, either during lunch breaks or after work. A brisk walk in the fresh, crisp air can boost mood, increase Vitamin D intake, and enhance overall well-being.

1. **Frosty Morning Stroll:** Start the day with a frosty morning walk, helping team members embrace the beauty of winter. Provide warm beverages for participants to enjoy during the walk.
2. **Post-Work Twilight Walks:** Organize post-work twilight walks, allowing your team to appreciate the serene beauty of a winter evening. A great way to clear the mind after a day's work.

WARM BEVERAGE BAR

Create a warm beverage bar in your office stocked with herbal teas, hot cocoa, and spiced cider. Encourage team members to take a few minutes to enjoy a comforting drink during the day. It's a simple yet effective way to boost morale and create a cozy atmosphere.

1. **DIY Hot Chocolate Bar:** Set up a DIY hot chocolate bar with various toppings like marshmallows, whipped cream, and flavoured syrups. Team members can create their custom hot cocoa.
2. **Herbal Tea Tasting:** Offer a selection of herbal teas and encourage your team to explore new flavours. Provide a cozy corner where team members can sip and relax.
3. **Bring in a pot of Hot Apple Cider:** There is nothing quite as comforting as the smell of hot cider throughout the office, with cinnamon sticks to stir. Leave the pot on all day and gather as you can to enjoy a cup and get to know your colleagues.

CHARITABLE INITIATIVES

Winter is a time when many people need extra help. You can hold a food drive, collect warm clothing donations, or volunteer as a team at a local shelter. Giving back not only boosts team morale but provides a sense of purpose.

1. **Winter Clothing Drive:** Organize a winter clothing drive, encouraging team members to donate gently used winter clothing items to those in need—partner with a local shelter or charity.
2. **Hot Meals for the Homeless:** Plan a day when your team volunteers at a local shelter, serving hot meals and providing warmth to the less fortunate during the winter.

LEARNING AND DEVELOPMENT

Winter can be an ideal time for learning and personal growth. Encourage your team to attend workshops, webinars, or skill-building sessions. This can help team members develop personally and professionally, increasing their sense of accomplishment.

1. **Winter Workshop Series:** Arrange a series of winter workshops that focus on personal and professional development. Topics could include personal and professional wellness, stress reduction, or career advancement strategies.
2. **Book Club:** Start a winter book club where team members read and discuss a self-help or motivational book. This can lead to valuable personal growth discussions.

Winter doesn't have to be a season of hibernation and lowered team morale. With these wellness activities, you can create a vibrant and healthy work environment for your team. Embrace the spirit of togetherness, health, and positivity as you navigate the winter months, and watch your team's well-being flourish.

It would be a pleasure to work with you and your organization in the future. If you are interested in having me work with your team, please reach out at wellbydesign.ca.

Stay warm and well!

This content has been supplied by Steven Langer at Well By Design, an organization helping workplaces achieve a healthy working culture that can lead to increased productivity, employee satisfaction, and retention.



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MAKE A DONATION

STRENGTHENING YOUR RESPONSE TO STRESS

It's no secret that tax season can be a stressful time for CPAs. Whether you work in tax, are preparing for year-end, or are dealing with other stressors at work and at home, there is a good chance you may find yourself amongst the 67% of CPAs who report experiencing major stressors on a daily basis. Work-related stressors are in the lead as the top reported major stressor (56%) with family following close behind (42%) and finally health (27%). (Source: 2022 CPA Assist Health and Wellness Survey).

Elevated stress levels can impact your physical and mental health, so it is important to notice if you are feeling more stressed than usual, and to take time to formulate a plan for taking care of yourself. With some lessons from CPA Assist's November webinar, "Strengthening Your Response to Stress," we can all learn to recognize and reframe our stressors to manage the impact of stress in our lives.

In the webinar, Registered Psychologist Laurie Zalmanowitz defined stress, and encouraged attendees to inspect their own stressors by asking whether stress is due to an active threat or to situational discomfort. By evaluating the stress, we can take a step back and ensure we are responding appropriately.

He also outlined something called the Challenge Response, a strengths-based response to stress where, by focusing on your strengths and the areas where you can exert control over your stressors, you begin to view your situation as a challenge instead of an obstacle.

Finally, Laurie outlined three different strategies for self-regulation that anyone can use to restore calm in moments when stress is elevated.

[Click here to watch](#) the webinar recording. Knowing how to implement these strategies will help you get back to baseline at any time of year.

Chronic stress can lead to burnout—an outcome we all want to avoid. According to the Canadian Psychological Association, [burnout](#) is defined as "a syndrome conceptualized as resulting from chronic workplace stress that has not been successfully managed" and is characterized by three dimensions:

1. Feelings of energy depletion or exhaustion;
2. Increased mental distance from one's job, or feelings of negativism or cynicism related to one's job; and
3. Reduced professional efficacy.

[Watch the recording of the Strengthening Your Response to Stress webinar.](#)

For more information about upcoming webinars and events, visit cpa-assist.ca.

SOURCES

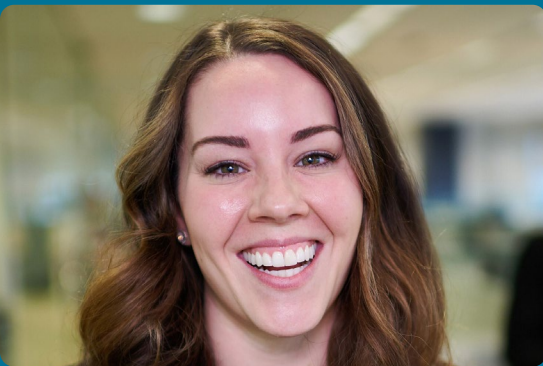
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To book an appointment, call 1-855-596-4222 or email cpaforbes@telus.net. CPA Assist provides confidential counselling services and 24/7 crisis support to Alberta and Saskatchewan CPAs, candidates, and their immediate families.





MEMBER PROFILE

ERIN CAMPBELL, CPA, ON THE VALUE OF THE DESIGNATION IN AN UNCONVENTIONAL CAREER PATH

Erin completed her Bachelor of Business Administration in 2013 from the Hill School of Business at the University of Regina. She began the traditional articling route at a local public accounting firm as an accountant, working on audits, reviewing engagements, and giving notice to reader compilations.

Being part of the first cohort/offering of the CPA PEP program allowed Erin to explore opportunities outside of the traditional public accounting firm route. So, she changed course and began employment with a local technology company, where she completed the remainder of her CPA modules and transitioned to the experience verification route to pursue her designation.

“The experience I could bring from my external audit and financial statement review experience helped me better understand the role the finance department plays in an organization. The opportunity to gain industry experience while applying my CPA education to the finance department at a technology company gave me exposure to the entire function from the inside out. Additionally, it helped me to understand the importance of the finance department’s alignment to a corporation’s strategy,” she explains.

After completing her CPA designation, Erin wanted to combine her passion for strategic decision making, finance, and technology, and joined Deloitte LLP as a Business Technology Analyst in 2016. While this is not a traditional role that someone with an accounting background or CPA designation would typically seek, she recognized there was opportunity for a business professional to understand and apply changing technologies to meet an organization’s needs for transformation.

Regardless of this new technology territory, Erin found she was able to quickly navigate and understand leading practice business processes and the many dependencies with respect to supply chain management and procurement functions, finance operations, and human resources.

Erin found that other opportunities came her way because of her CPA designation. In 2018, she was awarded a secondment with Deloitte Global Consulting as her CPA designation stood out amongst other candidates because of its international recognition. This opportunity provided her with valuable international exposure and experience that she could bring back to Saskatchewan.

In 2022, Erin was appointed Chief of Staff for Deloitte Consulting Enterprise Technology and Performance portfolio, where her CPA designation and project experience in business transformation and technology were an asset to the leadership team. Erin is currently a Senior Manager at Deloitte LLP in Emerging ERP Solutions “practice,” where she enjoys the variety and strategic nature of her work—focusing on client needs, solving unique challenges, and collaborating with subject matter experts in many industries and technologies across finance and operations.

Changing career paths early on did have me question whether my CPA designation would still serve me in a completely different profession. I’ve found that even though I didn’t require a CPA designation to work in business technology consulting, it has given me a boost in fundamental understanding of business operations, processes and controls, risks, and evaluating stakeholder needs. It has given me credibility with clients and team members. My CPA designation has opened additional doors for me in the professional world.

KNOW A CPA WE SHOULD PROFILE?

Email Pam Hoffart, Communications and Events Coordinator, at phoffart@cpask.ca to tell us about an inspiring CPA who you would like to see featured!



Continued on page 20

The most important skills that Erin indicates she attained through the CPA program are the abilities to analyze problems and opportunities, case and report writing skills, and resilience in mindset. She acknowledges that the time commitment to complete weekly assignments and study for module exams can seem daunting while working full-time and having other life commitments and obligations. However, the time passes quickly and the reward of earning your CPA designation continues to benefit you throughout your career.

Erin's passion for self-learning and professional development continues today, and she believes that the best investment you can make is in yourself. Since earning her designation, she has also pursued her Project Management Professional (PMP) and Information Technology Infrastructure Library (ITIL) Foundation designations to better serve her clients and teams.

As a CPA Saskatchewan Regulatory Committee Volunteer, Erin enjoys having the ability give back to the profession and develop her skills related to governing professional bodies and supplementing her professional governance skills.

Additionally, she notes that working with other members across Saskatchewan has been a great way to foster new connections with like-minded professionals.

What advice would Erin give to future CPAs or those who are considering the program?

“Whether you plan to own and operate your own business, invent a new product or technology, or want to set up a not-for-profit organization, the CPA designation can be a powerful driver to set you and your future career up for success. The CPA designation can benefit any professional, regardless of position or industry, by providing fundamental understanding and experience, it gives you the background and understanding to have educated conversations with business leaders, potential investors, and other professionals.”

KEY LICENSING REMINDERS

FOR CPAS PRACTICING IN COMPILATIONS

1

CPAs CANNOT issue Notice to Reader reports along with financial statements. ONLY Compilation Engagement Reports issued by a licensed CPA are permitted.

2

Licensing is an addition to member registration. A separate application for a licence is required.

3

Licensing is **required** for the practice leader authorizing the Compilation Engagement Report.

4

A firm registration is required, even when authorizing only one compilation engagement report, regardless of who the client is or whether you receive any fees.

5

A cease and desist order and penalty is issued if practicing professional accounting while unlicensed.

6

To report a licensing violation, email licensing@cpask.ca.

[CLICK TO LEARN MORE.](#)



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INTIMIDATED BY NETWORKING?

HERE'S HOW TO START

You have amazing work experience, a finely tuned resumé, and a well written cover letter. Great! However, you could be missing out on one of the most influential aspects when it comes to finding your dream job: networking.

When it comes to the job search, you want to make sure you have the perfect balance of “what you know” and “who you know.” No matter how much experience you have in your industry, networking can give you that extra advantage that will propel you towards a job you enjoy.

If you want the chance to find amazing recommendations and job offers through word of mouth, you'll want to start networking as soon as possible. Here are some networking tips that you can use to make great new connections and get your foot in the door of your industry's community!

TIP #1: CHOOSE A NETWORKING STYLE

The first tip we'd like to share is the importance of creating a style of networking that's all your own. As there is no “right” way to network, you'll want to make sure you can create a way that you can easily maintain.

Every person is unique and communicates in a different way, so you shouldn't expect your preferred style of networking to be the same as everyone else's. **Developing your own style can help you become more comfortable making connections with others in a way that works best for you.**

In order to do this, you should assess your own communication strengths and weaknesses to see where you fit in best in terms of networking. Are you better in person, meeting with people at events and workshops? Or do you prefer to network through online tools like social media and email connection?

Being conscious about your preferred style of communication can save you time and stress when trying to connect with others.

TIP #2: TRY VOLUNTEERING

Want a way to network that also allows you to give back to causes you believe in? Say hello to the wonderful world of volunteer work.

Volunteering for a nonprofit organization in your industry that promotes change you want to see can actively double as a way to make amazing work connections. With similar people coming together to all work on the same cause, you get to communicate with and get to know people that may actually have connections in the field you're trying to get hired in.

Search for volunteer opportunities in your area and use keywords that relate to the industry of your choice. Board positions are often posted to CPA Saskatchewan's job board, [Career Connect](#), so this is a great place to start your search! Then, choose the one that resonates with you and put your time in towards a good cause while also meeting with like-minded industry connections!

Continued on page 24

TIP #3: BRAND YOURSELF

When networking with anyone, you want to make sure the image you put out is one that shows you're a great fit for any job openings. You always want to make sure you're well aware of the perception people may get from you when networking.

This is why it's good to focus on your own "self-branding." **Be aware of what strengths you can present to others, such as your personality, your unique set of talents, and the way you collaborate with others to problem solve.** Providing a great first impression—both in appearance and in skill—can really help you win people over with great connections in your industry.

If you can focus these aspects of yourself and present them successfully to the world, you're on your way to a great personal brand that will elevate your networking possibilities.

TIP #4: BE YOURSELF

While this tip seems obvious, it can be easy to slip into a persona that doesn't accurately represent your work skills and individual identity when trying to network with important professional experts.

While wanting to impress your colleagues is natural, it does not mean you should present a false representation of who you are.

The best thing to do when networking is to be yourself in all aspects. Showcase the expertise you have in your area, but don't add fluff words or fabricate tasks you've completed.

Present those you're networking with your authentic personality and stay true to your own personal quirks and communication style. A true first impression will bring you a lot further than a false one.

Focusing on the real you in terms of professional work and personality will really help you win over your peers in the networking world.

These 4 tips are a great way to get started on your path to better networking. Start your networking journey today and see where it can take you in the future!

This content is provided by Web Scribble Solutions, Inc..

CPA Saskatchewan's job board, CPA Career Connect, powered by Web Scribble Solutions, Inc., is here to connect employers with qualified Chartered Professional Accountants across Saskatchewan. Visit [CPA Career Connect](#) to search for current career and volunteer opportunities or to post your position.

ADVANCED DATA MANAGEMENT CERTIFICATE PROGRAM

The [Advanced Data Management Certificate Program](#) (ADMCP) is a facilitated program presented by CPA Canada in collaboration with KPMG Canada and Simon Fraser University's (SFU's) School of Business (Executive Education).

The skill requirements for accountants are changing. Expectations for mid-level staff now include advanced model creation and analytical skills to help create relevant and clear data for decision makers. CPAs are becoming required to understand how to utilize software and systems in a more advanced manner, to ensure long-term sustainability of the profession.

The Advanced Data Management Certificate Program (ADMCP) will teach skills that benefit those in finance and accounting roles, from analysts to senior managers, or those who want to take on the responsibilities of working with and analyzing data. The ADMCP can also act as a pathway for professionals wishing to explore data analyst roles.

Each course runs six consecutive weeks, with one module per week. Students may be eligible to receive university credit on completion.

The individual courses and dates are:

- [Introduction to a Data Analytic Framework:](#)
March 4 – April 14, 2024
- [Visual Storytelling with Data:](#) April 29 – June 9, 2024
- [Data Governance: Risk Strategy and Data Privacy:](#)
July 8 – August 18, 2024
- [Business Intelligence, Automation and AI:](#)
September 9 – October 20, 2024
- [Applied Accounting Analytics:](#)
November 4 – December 15, 2024

Participants can register at different stages of the cycle. Registration for each course or program closes 10 days prior to the start date of the full program for each course. The entire program earns 125 CPD hours. [Go here](#) to register.

For those that require additional base training in cleaning data and tools such as Power BI, Tableau, and Power Query, check out CPA Canada's [data management foundations certificate program](#).



SUSTAINABILITY/ESG CERTIFICATE

The [Sustainability and ESG certificate](#) supports the ability of business professionals to contribute to an organization in creating value for the long term while considering the impact on society at large. Beyond the three pillars of environmental, social, and governance (ESG), the certificate explores strategic risks and opportunities within sustainability from a financial and economic mindset as well as sustainability reporting and disclosure and touches on assurance considerations from an internal control perspective.

The competency of Sustainability is one of the largest disruptions in the profession in over 100 years. Developing your knowledge is a gateway to opportunity in this growing field with an increasing number of roles popping up, such as sustainability controller. Those who have a base knowledge in sustainability will become increasingly valuable to the organization, and those that have well-rounded financial and business acumen to accompany this knowledge, will have a competitive skills advantage. Becoming a key resource at your organization will give you the opportunity to position yourself for more senior positions and add increasing value to your organization's future.

Even if you are not a public company, organizations that are part of a larger value chain will experience needs from those they supply or provide services to. In addition, financial institutions, private equity, and other providers of capital are increasingly interested in key sustainability metrics for organizations of all sizes.

The certificate is composed of four courses:

1. [Introduction to Sustainability: A Multi-Year Retrospective](#)
2. [Deep Dive into Sustainability: Understanding E, S, and G](#)
3. [Sustainability Reporting and Disclosure](#)
4. [Capstone](#)

You will learn about:

- sustainability over the years
- sustainability frameworks and standards
- organizational impacts
- regulatory, legal, and reputational impacts
- ESG investing and stakeholder stewardship and engagement
- environmental, social, and governance topics (climate change, biodiversity, diversity, equity, and inclusion, greenwashing, etc.)
- sustainability for Materiality and Assurance
- economic, financial, and data considerations
- strategic considerations

Visit the [CPA Store](#) to register.

ANTI-MONEY LAUNDERING

WHEN DOES IT APPLY TO YOU?

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PROCEEDS OF CRIME (MONEY LAUNDERING) AND TERRORIST FINANCING ACT

The *Proceeds of Crime (Money Laundering) and Terrorist Financing Act* (the “Act”) came into effect on June 23, 2008. The legislation brought about several changes that affect reporting, record keeping, client identification, and the implementation of a compliance regime. Regarding the compliance regime for accountants, one of the major changes is the new requirement for a risk-based approach to processes and documentation requirements.

CROSS-BORDER TRANSFERS OF CURRENCY

There are two parts to the Act: one part of the Act deals with the transfer of currency or monetary instruments across borders and it applies to EVERYONE. When someone sends cash or monetary instruments over \$10,000 across the Canadian border, the person or entity must complete a Currency and Monetary Instrument Reporting form for CRA, who then sends a copy to FINTRAC.

FINANCIAL INTERMEDIARIES

The other part of the Act deals with record keeping and reporting of suspicious transactions and prescribed financial transactions. This section does not apply to CPAs engaged in the performance of audits, reviews, or compilations carried out in accordance with the recommendations set out in the CPA Handbook.

It does apply if the CPA has been engaged to act as a financial intermediary, which would include the performance of any of the following activities:

1. Receiving or paying funds. For example, are you making GST payments or receiving GST refunds on behalf of your clients?
2. Purchasing or selling securities, real property, or business assets or entities. For instance, if you are involved in wealth management activities, do you give instructions regarding your client's investments?
3. Transferring funds or securities by any means. For example, do you have the authority to transfer funds to the payroll account on behalf of your client, in regular circumstances, or even just when your client is on holidays?

FINANCIAL TRANSACTIONS AND REPORTS ANALYSIS CENTRE OF CANADA

The Financial Transactions and Reports Analysis Centre of Canada (FINTRAC) is Canada's financial intelligence unit. Its mandate is to facilitate the detection, prevention, and deterrence of money laundering and the financing of terrorist activities, while ensuring the protection of personal information under its control.

FINTRAC has provided guidance for accountants and accounting firms that engage in the activities numbered 1 to 3 listed above. The guidance can be accessed [here](#) and discusses reporting requirements with regards to suspicious and/or large cash transactions, as well as record keeping, ascertaining the identity of individuals and entities, use of personal information, and establishing a compliance regime.

COMPLIANCE REGIME

If members are acting as financial intermediaries, then they must implement a compliance regime covering the recording and reporting of suspicious transactions and prescribed financial transactions, as well as reporting cross-border transfers of currency or monetary instruments at or above a specified threshold (more on these transactions below). This regime also includes, as far as practicable, the following:

- Obtaining a commitment from senior management (partners in the case of CPA firms).
- Appointing a compliance officer.
- Developing compliance policies and procedures.
- Monitoring the effectiveness of the compliance system.
- Providing ongoing training for employees and agents.

Members should be aware that FINTRAC has the power to enter the premises of a financial intermediary at any reasonable time, without a search warrant, to determine whether they are complying with their obligations to report and record transactions.



SUSPICIOUS AND PRESCRIBED TRANSACTIONS

Where members are acting as financial intermediaries, members must report to FINTRAC any transactions where there are reasonable grounds to suspect the transactions are related to the commission of a money laundering offence or a terrorist activity financing offence. Members must use their professional judgement, as there is no ready definition of what constitutes a suspicious transaction. However, they can look to Guidelines from FINTRAC for guidance in assessing whether a transaction is suspicious and should be reported.

When acting as financial intermediaries, members must keep a large cash transaction record, unless the cash is received from a financial entity or a public body. In addition, members must:

- Ascertain the identity of the person involved in the transaction.
- Take reasonable measures to determine whether the individual who gives the cash is acting on behalf of a third party.
- Obtain and retain a third party disclosure statement signed by the client if they are acting on behalf of a third party, or if there are reasonable grounds to conclude this is the case.
- Starting January 31, 2003, members acting as financial intermediaries must report the following transactions:
 - Large cash transactions involving amounts of \$10,000 or more.
 - Sending or receiving international electronic funds transfers of \$10,000 or more.
 - Foreign exchange transactions at a rate that exceeds the posted rate, and the payment by an individual of transaction fees that exceed the posted fees.

IMPLICATIONS FOR AUDIT, REVIEW, AND COMPILATION ENGAGEMENTS

Members providing audit, review, and compilation engagement services do not have any statutory responsibility to report under the *Proceeds of Crime (Money Laundering) and Terrorist Financing Act*. However, should you encounter circumstances that suggest money laundering activities, you should be aware of the increased risk of misstatement in the financial statements and other forms of fraud. Most of all, you need to consider the effect on your reputation and other possible legal consequence. If in doubt, seek legal advice.

UNDERSTANDING WHISTLEBLOWER PROTECTION: INTERNATIONAL LAWS, PRACTICES, AND TRENDS

The accountancy profession has a central role to play in championing the protection of whistleblowers from retaliation as well as accountability for wrongdoers. Learn how more jurisdictions are recognizing the importance of [dedicated whistleblower protection law](#).

Be sure to review CAS 240, *The Auditor's Responsibilities to Fraud in an Audit of Financial Statements*, if you encounter such unusual circumstances during an audit. If you are performing a review, consider whether there are areas of material misstatement and consider performing additional review engagement procedures. If you are performing a compilation and the circumstances lead you to believe that the financial statements are misleading, you should request additional or revised information. If that is not forthcoming, consider not releasing the statements and resigning from the engagement.

MEMBERS' RESPONSIBILITIES

Members are reminded that the requirements for implementing a compliance regime and the reporting of suspicious transactions and prescribed financial transactions are required only if you are providing services deemed to be that of a financial intermediary. Failure to comply with the Act can result in serious penalties: five years imprisonment and/or a fine of \$2 million.

Members are urged to review carefully the range of services they provide to their clients. If you are acting as financial intermediaries, then you should consider developing a communications strategy to disclose, in writing, your reporting obligations and other requirements under the Act. This is something you need to discuss with your clients because the statutory requirement for financial intermediaries to report suspicious transactions overrides our Code of Professional Conduct with respect to client confidentiality.

JUNE 2016 UPDATE TO THE ACT AND TRANSITION PERIOD

In June 2016, the federal cabinet approved amendments made to the Act by FINTRAC. The amendments and associated regulations changed the methods reporting entities can apply to ascertain the identity of clients. After June 17, 2017, reporting entities must use the new methods to identify individuals and confirm existence of entities.

Accountants and accounting firms are subject to [record keeping obligations](#) when they engage in or give instructions in respect of any of the following activities on behalf of an individual or entity (other than their employer):

- Receiving or paying funds;
- Purchasing or selling securities, real property, or business assets, or entities; or
- Transferring funds or securities by any means.

CPA Canada and CPA provincial and territorial bodies are collaborating in the fight against money laundering. [Click here](#) for resources on what CPAs need to know to comply and protect themselves, their clients, and their organizations.



KEY TIPS FOR MANAGING PRIVACY AND CYBERSECURITY RISKS WITH VENDORS

Kristél Kriel, Nathan Schissel, Jihan Hosein, Nicole Graham

This article was originally published by MLT Aikins and has been republished with permission.

As organizations increasingly outsource services to vendors, the need to effectively manage vendor risks has grown.

Failure to manage vendor risks can result in business interruptions, financial losses, lawsuits, reputational damage, and regulatory investigations and proceedings. This is particularly the case because you are accountable for all personal information you transfer to service providers. You can reduce these risks by performing due diligence, putting appropriate contractual safeguards in place, and conducting ongoing monitoring.

DUE DILIGENCE AND RISK ASSESSMENT

Completing appropriate due diligence activities prior to selecting a vendor helps you determine the risk of doing business with a vendor.

Due diligence activities help verify whether the vendor:

- is reputable and honest
- has the experience, skill, and resources to carry out the contract
- has reasonable compliance programs and internal controls in place
- has conducted external assessments or certifications
- has a history of incidents or non-compliance

Due diligence activities help you assess the vendor's privacy and cybersecurity program by determining what information the vendor receives, how it will be stored, who has access to the information, whether the vendor's employees receive appropriate training, and whether appropriate safeguards are in place for the information.

By identifying any "red flags" or gaps as part of this review, you can determine whether and how you would like to proceed with the vendor, and how to best manage these risks going forward.

PUT APPROPRIATE CONTRACTUAL SAFEGUARDS IN PLACE

Contractual safeguards can further reduce the risks arising from your relationship with the vendor. Examples of such safeguards include, among other things:

- Providing a clear requirement that the vendor take steps to comply with applicable laws
- Requiring the vendor to maintain policies and procedures acceptable to your organization
- Authorizing your organization to monitor and audit the vendor on an ongoing basis
- Requiring the vendor to immediately notify and cooperate with you in the event of an incident
- Requiring the vendor to have insurance coverage for privacy or cybersecurity incidents
- Limiting the vendor's ability to sub-contract and assign its obligations

- Indemnifying your organization and limiting its liability for any damages stemming from incidents experienced by or on account of the vendor's action or inaction
- Establishing consequences for the vendor's failure to meet its obligations with respect to privacy and cybersecurity
- Including clear rights to terminate for convenience where appropriate

CONDUCT REGULAR MONITORING

Conducting due diligence is an ongoing task – the job does not end when a contract is executed. Periodic reviews and audits should be completed to verify that contractual requirements continue to be met. Any incidents or allegations of misconduct should be investigated, with steps taken to ensure compliance with applicable laws. As gaps are identified throughout the life of the contract, they should be addressed.

TAKEAWAYS FOR YOUR ORGANIZATION

The risk associated with storing personal and other confidential information is heightened when the information is transferred to service providers. By properly vetting your vendors and carefully drafting contractual protections, you can reduce these risks significantly.

Likewise, by putting procedures in place to monitor the contract following its execution, you can verify that vendors continue to meet their contractual obligations.

The lawyers in the MLT Aikins Privacy, Data Protection & Cybersecurity group have extensive experience advising on and assisting with due diligence activities as well as reviewing and drafting contracts to mitigate risks from a privacy and cybersecurity perspective. They can also help you choose the right vendor management program for your operations. [Contact MLT Aikins to learn more.](#)

Note: This article is of a general nature only and is not exhaustive of all possible legal rights or remedies. In addition, laws may change over time and should be interpreted only in the context of particular circumstances such that these materials are not intended to be relied upon or taken as legal advice or opinion. Readers should consult a legal professional for specific advice in any particular situation.

REMINDER!

2023-24 PD Passports will expire on March 31, 2024. You still have time to use up your remaining credits! Search our [courses](#) to find the one that works best for you!

ENGAGING INDIGENOUS LEARNERS

In response to the Truth and Reconciliation Commission's Calls to Action, the Indigenous Learners in Accounting initiative addresses systemic barriers and incorporates Indigenous content, context and culture to increase Indigenous representation in accounting. Current offerings include:

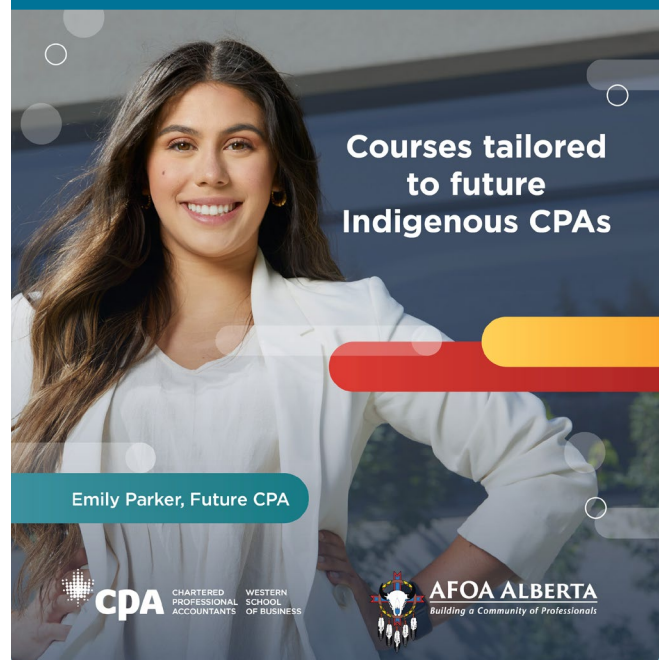
Two of the fourteen essential prerequisites for the CPA PEP:

- Introductory Financial Accounting (IFA) Course
- Introductory Management Accounting (IMA) Course

The two Core modules of the CPA Professional Education Program:

- CPA PEP Core 1 Module
- CPA PEP Core 2 Module

CPAs are encouraged to promote the courses to anyone who may be interested. For more information on upcoming courses/modules and registration, please visit the Indigenous Learners in Accounting (cpaweb.ca). If you are interested in becoming an instructor, please contact CPAWSB.



Courses tailored to future Indigenous CPAs

Emily Parker, Future CPA

CPA CHARTERED PROFESSIONAL ACCOUNTANTS WESTERN SCHOOL OF BUSINESS

AFOA ALBERTA Building a Community of Professionals



STAY UP TO DATE

CPA CANADA'S FORESIGHT INITIATIVE



EPISODE 2: SHOULD ACCOUNTING BE PART OF STEM?

Jan Taylor, CPA, PhD, addresses a [growing movement in the United States to have accounting considered as a STEM](#) field and its potential impact on attracting new talent into the profession.

EPISODE 5: GENERATIVE AI AND CPAS

Annie Veillet, partner at PwC Canada, discusses the [role of generative AI](#) and what it means for the accounting profession.

EPISODE 6: ADAPTING TO SUSTAINABILITY REPORTING STANDARDS

Tune in to CPA Canada's [final episode of Season 5](#) to listen to Shreya Verma Mair, CPA, discuss the need for companies to get up to speed on their ESG reporting and the role the CPA can play in this evolution.

TAX

2023 FALL ECONOMIC STATEMENT

On November 21, the Deputy Prime Minister and Minister of Finance released the federal government's 2023 [Fall Economic Statement](#), which contained some new tax announcements along with an update on previously announced tax measures.

Read CPA Canada's summary of key changes and updates to learn more.

ICYMI: RECENT FALL 2023 TAX DEVELOPMENTS

Catch up on [key tax developments](#) that tax practitioners should consider as we enter the new year.

AUDIT AND ASSURANCE

CSQM AND QMG CLOUD - WHAT'S IN IT FOR YOU?

Quality management is the act of overseeing all activities and tasks needed to maintain a desired level of excellence. Read about the [new Canadian quality management standards and tools](#) to stay ahead.



EXTERNAL REPORTING

SUSTAINABILITY REPORTING ALERT: SCOPE 1 & 2 GHG EMISSIONS

This is the first alert within CPA Canada's series of [Sustainability Reporting Alerts](#), which introduce concepts within the newly issued ISSB Standards (IFRS S1 and S2).

A DISCUSSION ON GENERATIVE AI WITH OLIVIER BLAIS

Olivier Blais, co-founder & head of decision science at Moov AI, and chair of the Canadian Mirror Committee of ISO/IEC Standards on AI, talks about the [risks and opportunities of generative AI](#), and suggests ways to start embedding it in the CPA toolkit.

SOCIAL IMPACT

ON DEMAND WEBINAR: UNDERSTANDING INTEREST RATES AND INFLATION

To understand how interest rate fluctuations and inflation impact the economy and you, watch CPA Canada's free webinar: [Separating fact from fiction: Inflation and interest rates](#), and get insights from CPA Canada's chief economist, David-Alexandre Brassard in conversation with Sean Killin from RBC Wealth Management.

MASTERING MONEY PODCAST – SEASON 8

Want to stay ahead of the rapidly changing labour market? Tune in to this season of the [Mastering Money podcast](#) to get insights on the future of labour and actionable tips to future-proof your career.

BECOME A FINANCIAL LITERACY VOLUNTEER

Financial literacy matters. Join CPA Canada in delivering resources to empower communities across Canada. Volunteer with [CPA Canada's Financial Literacy Champions Empowerment program](#) today.

SUSTAINABILITY

SUSTAINABILITY IS GOOD BUSINESS

Delve into CPA Canada's resources and learn how [companies committed to sustainability](#) can harmonize financial performance and their impacts on society and the environment.

UNDERSTANDING THE VOLUNTARY CARBON MARKETS: TEASER

Learn more about CPA Canada's [carbon credit research project](#), which will examine existing carbon markets and related standards. This project aims to understand best practices that can increase confidence in carbon markets and encourage investment in credible greenhouse gas emissions (GHG) reduction projects and schemes.



REGULATORY MATTERS

IN MEMORIAM

We were saddened to learn of the passing of the following members:

REGINA

- Michael Anthony Heffernan, CPA, CA on January 1, 2024.
- Merle W. Pearce, CPA, CMA on November 30, 2023.
- John O. Walter, CPA, CMA on October 17, 2023.

WHITE CITY

- Arlene Claudette Janzen, CPA, CA on November 13, 2023.

YORKTON

- John Joseph Skilnick, CPA, CA on October 27, 2023.

EDMONTON

- Erin Linda Kanak, CPA, CMA on June 2, 2023.

SASKATOON

- Glen Graham Dean, CPA, CA on January 6, 2024.

MERLE PEARCE, CPA, CMA

Merle passed away on November 30, 2023. Merle was a trailblazer, becoming the first female graduate of The Society of Industrial Accountants of Saskatchewan. She was enrolled at the University of Saskatchewan Regina Campus, earning her Accounting "Diploma," followed by her designation in 1971 when her children were teenagers. During her career, Merle was involved in lecturing and the Provincial Council of the legacy RIA. She began her accounting career as an Assessor with the Government of Canada's Department of National Revenue and finished her career as Treasurer for the CAA Saskatchewan Motor Club upon her retirement in 1993.

Our thoughts are with their families and friends.

CONGRATULATIONS TO OUR NEW MEMBERS

THROUGH GRADUATION

Abigail Akpan, CPA
Eric Appelquist, CPA
Jamal Asif, CPA
Mitchel Bellefleur, CPA
Kathleen Berenik, CPA
Jesse Boughen, CPA
Colton Brown, CPA
Mykaela Buhr, CPA
Maria Campbell, CPA
Brandon Dazzan, CPA
Regan Deschuk, CPA
Maria Dizon, CPA
Jason Duret, CPA
Logan Fauchoux, CPA
Will Ferguson, CPA
Yang Han, CPA
Erin Herold, CPA
Ian Howell, CPA
Taylor Istace, CPA
Meagan Jamieson, CPA
Yue Jiang, CPA

Sefi Vadakkekudiyirippil
Joy, CPA
Bhawna Kathuria, CPA
Jeanie Kim, CPA
Maria Koopman, CPA
Ryan Kowalchuk, CPA
Jingneng Li, CPA
Sarah Lindhout, CPA
Kimberly Loehndorf, CPA
Kristin Longfellow, CPA
Melissa Lukan, CPA
Runzhi Mai, CPA
Breanna McMillan, CPA
Robyn Medernach, CPA
Nachiket Mehta, CPA
Faiqa Naz, CPA
Ryan Ng, CPA
Hien Nguyen, CPA
Shreya Pahwa, CPA
Emily Parker, CPA
Unmehsi Patel, CPA

Thea Peters, CPA
Cayden Postnikoff, CPA
Wenli Ren, CPA
Marina Sandberg, CPA
Kaylee Schmidt, CPA
Dustin Skitcko, CPA
David Smith, CPA
Jason Snarr, CPA
Ileana Spilca, CPA
Kenzie Stoudt, CPA
Rolan Suarez, CPA
Rhys Sutter, CPA
Cole Sylvestre, CPA
Lianne Tanguay, CPA
Emma Taylor, CPA
Emily Weedmark, CPA
Nicola Wells, CPA
Nathan Wiebe, CPA
Xiaobin Yu, CPA
Mamta, CPA

THROUGH MRA

Tharun Challa, CPA
Noman Chaudhry, CPA

Tejas Ghadiyali, CPA
Sahil Jaswani, CPA

NEW TO SASKATCHEWAN

Kenneth Austin, CPA, CA
Stephen Bergstrom, FCPA, FCMA
David Bickerton, CPA, CPA
Bryn Botham, CPA, CMA
Graeme Boe, CPA, CPA
Louise Chauvet, CPA, CA
Raveena Dhaliwal, CPA, CA
Glenn Fleetwood, CPA, CGA
Erin Gardiner, CPA, CA
Michael Goldade, CPA, CA
Ryan King, CPA, CPA
Angela Law, CPA, CA
Jeffrey Lumictin, CPA, CPA
Sadik Najerali, CPA, CA
Ifedapo Olatunji, CPA, CGA

Andrew Osinchuk, CPA
Randy Popik, CPA, CA
Nathan Heide, CPA, CPA
Steven Reichert, CPA, CA
Jeffrey Rempel, CPA, CA
Neha Sahi, CPA, CA
Kristen Suelaman, CPA, CPA



WELCOME
TO ALL
OUR NEW
MEMBERS!

Winter 2024



The Institute of Chartered Professional Accountants of Saskatchewan

NOTICE OF SUSPENSION OF REGISTRATION AS A FIRM

On January 31, 2024 the Institute of Chartered Professional Accountants of Saskatchewan approved the suspension of registration of the following firm:

BK AND ASSOCIATES CHARTERED PROFESSIONAL ACCOUNTANT PROF. CORP.

The registration of this firm has been suspended pursuant to Regulatory Bylaw 33.1(a) and Regulatory Board Rule 333.3 due to non-compliance with Bylaws 10.4 and 130.1 (Renewal and Fees).

During this period of suspension, this suspended firm shall not use either the title 'professional accountant', the professional designation 'Chartered Professional Accountant', or the initials 'CPA' in Saskatchewan.

Authorized by:

January 31, 2024

Leigha Hubick, CPA, CA
Registrar



The Institute of Chartered Professional Accountants of Saskatchewan

NOTICE OF MEMBER AND FIRM LICENCE RESTRICTION

On December 8, 2023, in accordance with Bylaw 31.1 and Rule 331.1, the Professional Practice Committee of the Institute of Chartered Professional Accountants of Saskatchewan approved a licence restriction of the following member and firm:

**SPENCER DANIEL BEAULIEU, CPA, CA
SPENCER BEAULIEU CPA PROF. CORP.**

The licence of this member and firm has been restricted such that the member of the firm shall engage a licensed monitor approved by CPA Saskatchewan. The licensed monitor shall carry out a complete file review of all audit engagement documentation for client engagements reporting under the Accounting Standards for Not-for-Profit Organizations (ASNPO) financial reporting framework published within the CPA Canada Handbook. The licensed monitor shall authorize the release of all audit engagement reports by the firm in Saskatchewan after December 8, 2023.

Authorized by:

December 27, 2023

Leigha Hubick, CPA, CA
Registrar



The Institute of Chartered Professional Accountants of Saskatchewan

NOTICE OF DISCIPLINE DETERMINATION AND ORDER

On December 22, 2023, the Discipline Committee of the Institute of Chartered Professional Accountants of Saskatchewan issued its Determination and Order for:

JEANNE ELIZABETH GILCHRIST, CPA, CMA

The member has been found guilty of professional misconduct under Section 26 of *The Accounting Profession Act* related to failures in the delivery of taxation services for one client over the periods of 2013 through 2020. The failures included not preparing and not filing T2 Corporation Income Tax Returns for the client over multiple years and not advising the client that the Returns had not been filed at each missed deadline.

Visit www.cpassk.ca [Gilchrist, Jeanne - Discipline](#) for the full Determination and Order.

Authorized by:

January 8, 2024

Leigha Hubick, CPA, CA
Registrar

