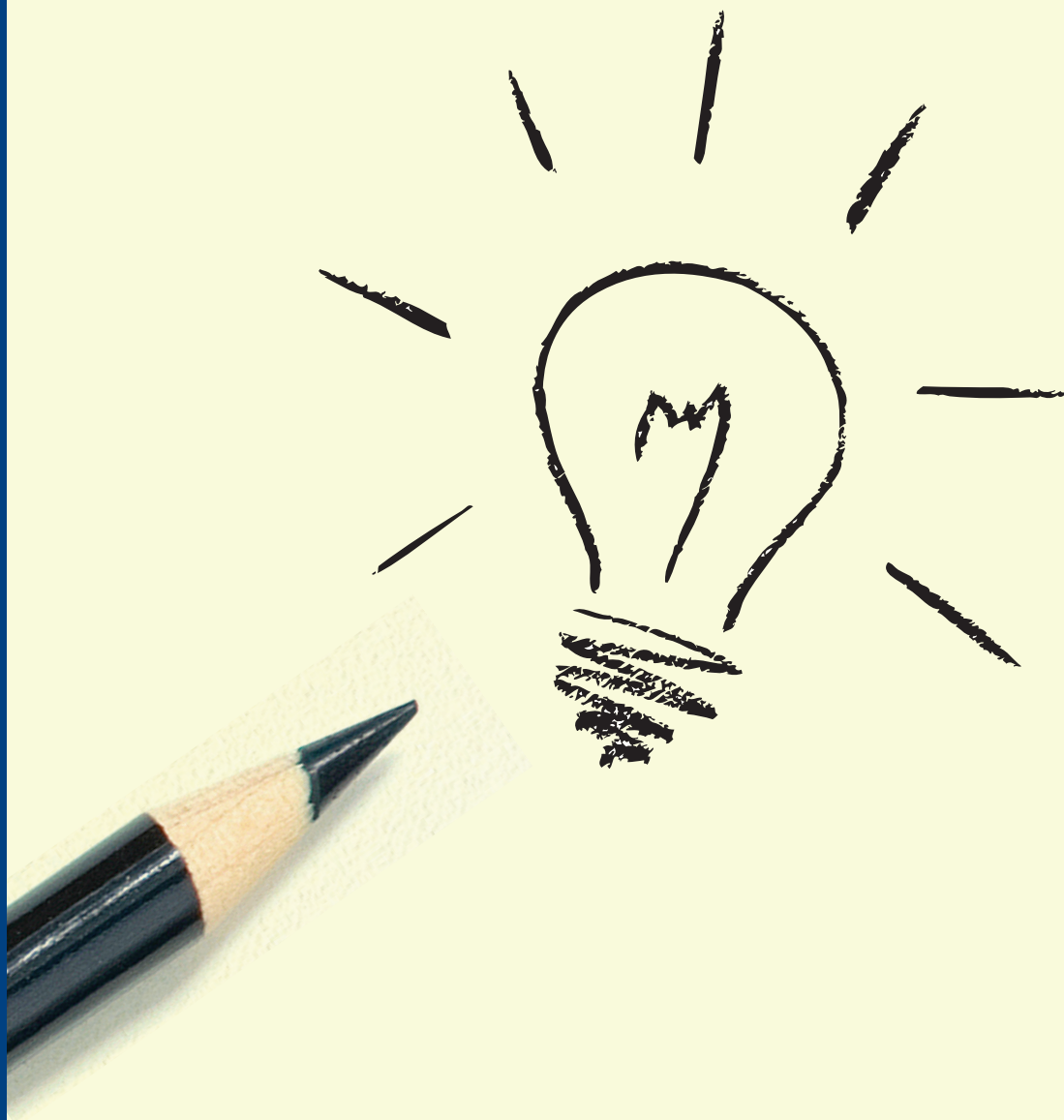


Winter 2009/2010 Continuing Education Programs

Expand Your Mind: Grow Your Career



Professional Development **Institute**
PDI



**Certified
Management
Accountants**

Table of Contents

Continuing Education Programs – Toronto

February

Feb. 4	How will the Harmonized Sales Tax (HST) affect Your Business? – Half-Day Morning Workshop	Jane Adams	CMA Ontario Professional Development Institute	4
Feb. 9	Excel Pivot Tables – Half-Day Morning Workshop – Markham	Alan Salmon	Delta Markham	4
Feb. 12	Managing IFRS Implementation	Eban Bari	CMA Ontario Professional Development Institute	5
Feb.16-21	Certificate Program in IFRS Implementation Six-Day Program	Eban Bari, Al Foerster and Jacques Maurice	CMA Ontario Professional Development Institute	6
Feb. 18	Fast and Easy IFRS vs. GAAP Comparative Financial Statement Analysis	Mike Morley	CMA Ontario Professional Development Institute	7
Feb. 19	Excel Financial Reporting	Alan Salmon	CMA Ontario Professional Development Institute	8
Feb. 23	Enterprise Risk Management for Competitive Advantage	Robert Torok	CMA Ontario Professional development Institute	9

March

Mar. 4	Business Strategies for Sustainability	Barry Colbert	CMA Ontario Professional Development Institute	9
Mar. 5	Managing Employee Engagement	Brenda Marshall, Ph.D.	CMA Ontario Professional development Institute	10
Mar. 8	Managing Transfer Pricing	Dale Hill	CMA Ontario Professional Development Institute	11
Mar. 9	IFRS and Fraud: The Perfect Combination	Mike Morley	CMA Ontario Professional Development Institute	12
Mar. 10/11	Two-Day Technology Workshop	Alan Salmon Ward Blatch, Tommy Stephens	Doubletree by Hilton, Toronto Airport	13
Mar. 23	Balancing Roles: The 360° Employee – Half-Day Morning Workshop	Samantha Hurwitz and Marc Hurwitz	CMA Ontario Professional Development Institute	13
Mar. 24	How will the Harmonized Sales Tax (HST) affect Your Business? – Half-Day Morning Workshop	Jane Adams	CMA Ontario Professional Development Institute	14
March 25/26	IFRS Two-Day Immersion Program	Al Foerster	CMA Ontario Professional Development Institute	15
Mar. 26	Strategy Maps and the Balanced Scorecard in Government and Not for Profit Organizations	Tony Atkinson	CMA Ontario Professional Development Institute	16

Continuing Education Programs – Kitchener

Mar. 4/5	IFRS Two-Day Immersion Program	Al Foerster	Delta Kitchener Waterloo	17
----------	--------------------------------	-------------	--------------------------	----

Continuing Education Programs – London

Feb. 11	Private Enterprise GAAP	Al Foerster	London Delta Armouries	19
---------	-------------------------	-------------	------------------------	----

Continuing Education Programs – Ottawa

Feb. 1	Advanced Excel	Alan Salmon	Hampton Inn Ottawa	20
Feb. 25	Private Enterprise GAAP	Al Foerster	Hampton Inn Ottawa	21
Mar. 26	How will the Harmonized Sales Tax (HST) affect Your Business? – Half-Day Morning Workshop	Jane Adams	Hampton Inn Ottawa	22

Table of Contents (continued)

Consulting CMA Workshops – Toronto

Feb. 4/5	Essentials of Management Consulting (CMC Approved) Three-Day Workshop (Day Two and Three)	Eric Cousineau	CMA Ontario Professional Development Institute	23
Feb. 18/19	Professional Orientation Two-Day Workshop	Jon Kerr	CMA Ontario Professional Development Institute	24
Mar. 1	Personal Tax	Larry Tomlin	CMA Ontario Professional Development Institute	25
Mar. 19	Consulting Skills	Jon Kerr	CMA Ontario Professional Development Institute	26

Consulting CMA Workshops – Ottawa

Mar. 26	Consulting Skills	Jon Kerr	Hampton Inn Ottawa	27
---------	-------------------	----------	--------------------	----

Workshop Hours	28
CPLD Information	28
Cancellation Policy	28
Location Details	28
Registration	31
Registration Form	31

For information about the “Accounting for Language” programs, presented by CMA Ontario and LEAP, please [CLICK HERE](#).

**Don't Miss Robert Kaplan's Execution Premium: Six Stages of Strategy Execution –
being held at the CMA Ontario PD Institute on Tuesday, April 27, 2010!**

Continuing Education Programs – Toronto

How will the Harmonized Sales Tax (HST) affect Your Business? – Half-Day Morning Workshop

Thursday, February 4, 2010

HST is only months away and yet some businesses will need to be ready as early as May 1, 2010. This timely and informative half-day workshop will provide basic knowledge to help you prepare for the HST. During this session participants will review and discuss important technical issues surrounding harmonization, including:

- Overview
- HST transitional rules and planning for the transition (e.g. fixed price contracts, lease vs purchase).
- Place of supply rules and jurisdictional issues
- Rebates (transitional rebates, point of sale, MUSH)
- Restricted ITCs (based on Quebec model) and segregating data
- Sector specific issues (e.g. manufacturing, professional services, retail, construction, public sector and financial sectors)
- Planning strategies to enhance your PST/HST savings on operations and capital replacements

INSTRUCTOR

Jane Adams, FCMA

LOCATION

CMA Ontario Professional Development Institute

SESSION HOURS

9:00 am – 12:00 noon

(Includes continental breakfast, before the session, and a refreshment Break)

Excel Pivot Tables – Half-Day Workshop – Markham

Tuesday, February 9, 2010

INTRODUCTION

PivotTables are the most powerful feature of Excel, yet few accountants use them in their day-to-day activities. For some, PivotTables are too intimidating; for others, PivotTables are a foreign concept. With a little information, guidance, and demonstration from the instructor, you will be ready to begin using PivotTables to accomplish routine analysis and reporting. This session will begin with basic PivotTables and progress to advanced PivotTable topics. Topics covered in this session will include drag-and-drop pivoting, grouping and ungrouping, creating calculated items and fields, and drilling down to underlying details. PivotTables consolidated from multiple ranges, and PivotTables dynamically linked to external databases and financial accounting systems will be covered. Participants will have access to sample data files.

Continuing Education Programs – Toronto

Excel Pivot Tables – Half-Day Workshop – Markham (continued)

This class will be taught in Excel 2007. References will be made to prior versions of Excel when there are differences. Users of all versions of Excel will benefit from this seminar. Please note this is an informational workshop (no laptop required).

KEY LEARNING OUTCOMES

- Creating basic and advanced Excel PivotTables
- Using advanced PivotTable options
- Performing calculations within PivotTables
- Customizing fields in a PivotTable
- Formatting a PivotTable report
- Creating PivotTables on multiple ranges
- Automating PivotTables by connecting them to external databases or financial accounting systems
- Understanding the limitations of PivotTables and PivotTable calculations

INSTRUCTOR

Alan Salmon

LOCATION

Delta Markham

SESSION HOURS

9:00 am – 12:00 noon

(Includes continental breakfast, before the session, and a refreshment Break)

Managing IFRS Implementation

Friday, February 12, 2010

As we approach the adoption date of IFRS in Canada, it is critical that accounting professionals not only have the key knowledge, but are also aware of how to manage the implementation process. This program will provide deep insight of all implementation issues including Accounting Policy, Implementation Issues for the key areas, controls and Project Management.

- Accounting policy related
 - Strategic choices for first time adopters and subsequent to transition
 - Development of IFRS Accounting Policies
 - Areas already converged
 - Standards that WILL change prior to Conversion and how to deal with these changes (i.e. ED 9, ED 10, etc)
 - Other key accounting issues

Continuing Education Programs – Toronto

Managing IFRS Implementation (continued)

- Implementation issues for the key areas
 - IT – Dual reporting
 - Taxation
 - Corporate Treasury
 - Financial Statement preparation
 - other
- Process and controls
- Project Management and other
 - Communication to people at various levels of organization
 - Training (2009, 2010 and subsequent to adoption)
 - Change management
 - Knowledge transfer
- Future of IFRS

INSTRUCTOR

Eban Bari

LOCATION

CMA Ontario Professional Development Institute

Certificate Program in IFRS Implementation Six-Day Program

Tuesday, February 16 – Sunday, February 21, 2010

For more information about this program, please [CLICK HERE](#)

INSTRUCTOR

Eban Bari, AI Foerster, CA and Jacques Maurice, MBA, CA, CMA, FCMA

LOCATION

CMA Ontario Professional Development Institute

Continuing Education Programs – Toronto

Fast and Easy IFRS vs. GAAP Comparative Financial Statement Analysis

Thursday, February 18, 2010

Is looking at both International Financial Reporting Standards (IFRS) and GAAP financial statements part of your job or a component of your or your client's corporate or personal investment strategy? Don't you wish you had an easier, faster way of doing it?

Financial statement analysis is a tool that allows you to "read between the lines." Learn the secrets to comparing IFRS and GAAP financial statements quickly and easily so you can make the right decisions every time.

This entertaining full day workshop includes practical examples and real life case studies and you will learn the instructor's unique approach to assessing a company's ability to pay its bills, and pay good returns to its investors using both IFRS and GAAP financial statements. You'll be amazed at just how much fun taking a class in comparative financial statement analysis can actually be!

TOPICS COVERED WILL INCLUDE:

- The 4 characteristics that make IFRS financial statements unique
- Point-by-point comparison of:
 - Management and Discussion Analysis
 - The Balance Sheet
 - Income Statement
 - Cash Flow Statement
 - Retained Earnings Statement
- How disclosures are different
- Using financial statement Notes effectively
- Key decision factors in IFRS vs. GAAP
- Real life comparisons using actual IFRS and GAAP financial statements

INSTRUCTOR:

Mike Morley

LOCATION

CMA Ontario Professional Development Institute

Continuing Education Programs – Toronto

Excel Financial Reporting

Friday, February 19, 2010

Microsoft Excel is a powerful tool for analyzing financial data and preparing financial reports, but like most powerful tools, it contains hidden features and functionality useful for these purposes that are not obvious to users, both novice and expert alike. The purpose of this course is to uncover these hidden features so that users may prepare computationally accurate and aesthetically pleasing reports in a more effective and efficient manner. It provides solutions for accountants in the following six major topic areas: advanced techniques for formatting reports and financial statements, assembly and printing of reports and schedules, using templates to automate reporting processes, advanced financial analysis with PivotTables connected to the General Ledger using ODBC, data consolidation, and using charts and digital dashboards for presenting financial information. Participants will have access to sample data files.

This class will be taught in Excel 2007. References will be made to prior versions of Excel when there are differences. Users of all versions of Excel will benefit from this seminar.

COURSE HIGHLIGHTS

- Select and act on multiple cells, ranges, rows, columns, and sheets simultaneously
- Use custom number formats to report in thousands, millions, or billions
- Customize your work environment by modifying the default workbook and worksheet templates
- Use Custom Views and the Report Manager to automate report printing and use the Camera to create complex reports from multiple ranges
- Linking Word documents to Excel data
- Perform advanced data analysis with data tables, subtotals, filters, PivotTables, and PivotCharts
- Use charting create dynamic dashboard displays of tabular data
- Create, manipulate, and customize charts for analyzing and communicating information
- Consolidate data using sub-totals and PivotTables
- Produce rolling reports with formulas using end-point sheets or end-point columns
- Save documents as PDF files to ease communication and distribution
- Learn how to publish an Excel document to the Web
- Understand how to create Dashboards to display complex data

INSTRUCTOR

Alan Salmon

LOCATION

CMA Ontario Professional Development Institute

Continuing Education Programs – Toronto

Enterprise Risk Management for Competitive Advantage

Tuesday, February 23, 2010

A risk foreseen is half avoided. The foundation of any successful Enterprise Risk Management (ERM) program is the identification of risks, in the context of an organization's strategic objectives, followed by risk analysis, risk assessment, and risk mitigation actions. This workshop will give you the critical elements to make your organization's ERM program a success, by enabling you to see many risks before they occur and to take actions with a more complete understanding of the implications of those actions across the enterprise.

RESULTS:

- Perspective on common risks and types of risks
- Techniques and tools to identify risks
- Working across organizational layers and boundaries
- Managing correlated and compound risks
- Risk assessment and prioritization approaches
- Examples of successful ERM Programs

Who should attend

CEOs, CFOs, COOs, CIOs, VPs of Finance, Operations Strategic and operational planners
Directors of Finance, Operations, Controllers

INSTRUCTOR

Robert Torok, MBA

LOCATION

CMA Ontario Professional development Institute

Business Strategies for Sustainability

Thursday, March 4, 2010

INTRODUCTION

Sustainability is increasingly becoming a strategic issue for businesses in all sectors. Global drivers such as climate, environment, population growth and social inequity are redefining the competitive landscape, and are demanding higher levels of attention, transparency and social responsibility from corporate entities. In recent years, a number of companies have completely redefined their business strategies in line with principles of sustainability in order to maximize value creation for the organization and its stakeholders. In this course we examine the global drivers for sustainability, frameworks for sustainable business, and the requisite skills in critical and integrative thinking to embrace and advance a sustainability agenda.

Continuing Education Programs – Toronto

Business Strategies for Sustainability (continued)

KEY LEARNING OUTCOMES

- Understand various ways of defining sustainability in practice
- Understand the importance of thinking critically, integratively, and strategically
- Learn more about the global environmental and social factors as business context
- Understand strategic frameworks for mapping appropriate strategic responses
- Learn of company examples of strategic re-invention

WHO SHOULD ATTEND

This course would benefit anyone who wants a greater understanding of sustainability issues and their business implications in the broad strategic sense. Emerging and established leaders who are in a position to influence organizational thinking, strategic innovation, and new business development would especially benefit. All participants will be better equipped to positively influence sustainability conversations in their organizations.

INSTRUCTOR

Barry Colbert, MBA, PhD

LOCATION

CMA Ontario Professional Development Institute

Managing Employee Engagement

Friday, March 5, 2010

This is a practical session based on the premise that engaged employees are more productive and more helping to develop more productive employees is the goal.

You will leave the session with ideas on how to determine where your employees are on the continuum from Actively Disengaged – Compliant – Cooperative – Actively Engaged. You will also have practical steps to take to help move your employees along that continuum towards Actively Engaged.

KEY LEARNING OUTCOMES ;

- Understanding employee engagement
- Understanding why employee engagement is important
- Understanding issues around engagement assessments
- Understanding the levers to pull to effect engagement

Continuing Education Programs – Toronto

Managing Employee Engagement (continued)

INSTRUCTOR:

Brenda Marshall, Ph.D.

LOCATION:

CMA Ontario Professional Development Institute

Managing Transfer Pricing

Monday, March 8, 2010

INTRODUCTION

During the past decade, multinational organizations have been expanding into global markets at an unprecedented rate and governments around the world are taking notice of the increase risk of fiscal erosion. Due to increased awareness and enforcement activities related to transfer pricing, companies need to comply with the requirements of multiple tax administrations. The complexity of the transfer pricing rules and the level of documentation required may overwhelm an organization's tax department.

Proper planning can position an organization to optimize its tax situation by properly placing the correct combination of functions, assets and risks in the desired location. This presentation will focus on the complexities of documenting intercompany transactions, such as finding appropriate benchmarks, and will also investigate strategies to optimize your company's global tax position. This presentation will discuss how to deal with a potential CRA audit and will investigate the various dispute resolutions mechanisms available to the taxpayer including which mechanisms are most favourable given the circumstances of the taxpayer. The presentation will conclude by reviewing recent court cases and their significant meanings for the greater transfer pricing community.

KEY LEARNING OUTCOMES

- Brief Overview of Transfer Pricing Legislation
- Practical Advice from Transfer Pricing Experts
- Managing Transfer Pricing Issues
- Understanding and Managing a Transfer Pricing Audit
- Dispute Resolution and Dealing with Reassessments to Resolve Double Taxation such as Competent Authority and Appeals
- Secondary Adjustments Causing Cash Flow Issues
- Understanding CRA Collections
- Comparables and Benchmarking to Establish an Arm's Length Price
- Migrating Intangibles
- Review of Recent Cases and Court Decisions
- Intercompany Services and Cost Sharing
- Valuation of Intangibles and Establishing Royalty Rates
- Relationship between Customs and Transfer Pricing
- Overview on US transfer pricing issues.

Continuing Education Programs – Toronto

Managing Transfer Pricing (continued)

WHO SHOULD ATTEND

This course will appeal to CFO's, tax directors, or comparable financial and tax officers. It is designed to help financial professionals and non-financial professionals understand transfer pricing rules as well as various strategies to optimize your company's global tax position.

LOCATION

CMA Ontario Professional Development Institute

INSTRUCTOR

Dale Hill, CMA, CFP

IFRS and Fraud: The Perfect Combination

Tuesday, March 9, 2009

INTRODUCTION

The switchover from GAAP to IFRS is causing some concern on the part of accountants. They can see where having to make so many judgment decisions opens up the potential for fraud. There can be subtle pressure to use this discretionary power to fudge the numbers a little bit.

Whether you will be involved in preparing IFRS financial statements or analyzing those statements, come to this class to discover where the high-risk areas are and what you can do about them.

TOPICS

The big 4 risk areas:

- Asset valuation
- Revenue recognition
- Offsetting
- Reserves

The fraud triangle:

- Opportunity
- Rationalization
- Pressure/need

Fraud strategies:

- Twisting the principles to justify decisions
- Misleading the auditor
- Compromising auditor independence

Red flags:

- Vague Management Discussion & Analysis
- Confusing financial statement notes
- Incomplete schedules

INSTRUCTOR

Mike Morley

LOCATION

CMA Ontario Professional Development Institute

Continuing Education Programs – Toronto

Two-Day Technology Workshop

Wednesday, March 10 and Thursday, March 11, 2010

For more information about this program, please [CLICK HERE](#)

INSTRUCTORS

Al Salmon, Ward Blatch and
Tommy Stephens

LOCATION

Doubletree by Hilton, Toronto Airport

Balancing Roles: The 360° Employee – Half-Day Morning Workshop

Tuesday, March 23, 2010

The 360° evaluation is a highly-regarded method to elicit key perceptions about a person's on-the-job skills and behaviours. In the evaluation, feedback to the recipient comes from their staff, peers, and leaders because the recipient has multiple roles as a leader, peer, and follower. And yet, nearly all organizations miss critical elements in developing 360° *action plans*. Research shows that a whole picture approach – creating action plans that balance the roles of leader, peer, and follower – is strongly linked to both personal and organizational success.

In this informative, high-energy, interactive, and engaging 1/2-day workshop for senior finance leaders (Controllers, CFOs, and high potential staff) you will learn the framework of the 360° employee model. You will practice using it to create 360° action plans, strengthen your performance coaching, and develop your high potential employees into the future CFOs and Controllers your organization needs. As well, you walk away with your own personal assessment while knowing how to build more productive partnerships with your staff, your leader, and your peers.

KEY LEARNING OUTCOMES

- Discover the relevance and importance of the 360° employee framework
- Learn the latest scientific and practical research about the value of different roles
- Understand how the framework relates to organizational and personal development
- Improve your skills at diagnosing performance issues
- Clarify performance appraisal and promotion decisions
- Create a better aligned team
- Develop brilliant seconds-in-command

INSTRUCTORS

Samantha Hurwitz, CMA and
Marc Hurwitz, MBA

LOCATION

CMA Ontario Professional Development Institute

Continuing Education Programs – Toronto

Balancing Roles: The 360° Employee – Half-Day Morning Workshop (continued)

SESSION HOURS

9:00 am – 12:00 noon

(Includes continental breakfast, before the session, and a refreshment Break)

How will the Harmonized Sales Tax (HST) affect Your Business? – Half-Day Morning Workshop

Wednesday, March 24, 2010

HST is only months away and yet some businesses will need to be ready as early as May 1, 2010. This timely and informative half-day workshop will provide basic knowledge to help you prepare for the HST. During this session participants will review and discuss important technical issues surrounding harmonization, including:

- Overview
- HST transitional rules and planning for the transition (e.g. fixed price contracts, lease vs purchase).
- Place of supply rules and jurisdictional issues
- Rebates (transitional rebates, point of sale, MUSH)
- Restricted ITCs (based on Quebec model) and segregating data
- Sector specific issues (e.g. manufacturing, professional services, retail, construction, public sector and financial sectors)
- Planning strategies to enhance your PST/HST savings on operations and capital replacements

INSTRUCTOR

Jane Adams, FCMA

LOCATION

CMA Ontario Professional Development Institute

SESSION HOURS

9:00 am – 12:00 noon

(Includes continental breakfast, before the session, and a refreshment Break)

Continuing Education Programs – Toronto

IFRS Two-Day Immersion Program

Wednesday, March 25 and Thursday, March 26, 2010

INTRODUCTION

With only months left before the date of adoption (January 1, 2011), this two-day workshop provides an overview of all significant IFRS requirements, presented by two expert instructors. It includes case studies, examples, exercises, and interactive participation from the participants. Designed as a condensed version of the IFRS Certificate program, this two-day workshop helps participants to acquire the tools necessary to understand and apply IFRS and prepare IFRS financial statements. The program includes the latest updates (including an update to changes to some of the listed standards), and participants are versed on all topics.

AGENDA

Day 1

- Introduction to IFRS and the IAS
- Financial Statement Presentation
- Revenue Recognition including Construction Contracts
- Provisions & Contingent Liabilities
- Inventory
- Property, Plant and Equipment
- Intangible Assets
- Impairment of Assets
- Borrowing Costs
- Non-Current Assets Held for Sale and Discontinued Operations
- Agriculture
- Accounting for Income Taxes
- Employee Benefits
- Share based payments
- Interim Reporting
- Related Party Disclosures

Day 2

- Financial Instruments and Hedge Accounting
- Leases
- Investment Properties
- Investment in Associates, Joint Ventures
- Business Combinations
- Consolidated and Separate Company Financial Statements
- Segmented Reporting
- Foreign Currency Transactions
- Implementation Processes and IFRS 1

WHO SHOULD ATTEND

This course is ideal for individuals at all levels within an organization who require knowledge of IFRS. In essence, it is an opportunity to transfer a crucial new skill set to those responsible for making accounting decisions, preparing, reviewing or approving IFRS financial statements. The program is generic and does not focus on any one particular industry.

INSTRUCTOR

Al Foerster, CA

Continuing Education Programs – Toronto

IFRS Two-Day Immersion Program (continued)

LOCATION

CMA Ontario Professional Development Institute

Strategy Maps and the Balanced Scorecard in Government and Not for Profit Organizations

Thursday, March 26, 2010

The workshop will explore the structure, format, scope, and roles of the balanced scorecard and strategy maps. The session will then discuss two case studies that focus respectively on:

1. Developing a balanced scorecard for a not for profit organization
2. Developing a balanced scorecard for a government department

The attendees will then develop and evaluate a balanced scorecard for their respective organizations and a strategy map to manage and support a major organization initiative.

The session will require approximately 4 hours of pre-session reading.

KEY LEARNING OUTCOMES

- Understand the role of the balanced scorecard in aligning organization units with the organization's overall objectives.
- Be able to specify the strategic performance measures needed to manage performance on the organization's key objectives.
- Understand the role of a strategy map in managing a major project implementation.
- Be able to develop a balanced scorecard for your organization and a strategy map for a specific initiative in your organization.

INSTRUCTOR

Tony Atkinson, FCMA

LOCATION

CMA Ontario Professional Development Institute

Continuing Education Programs – Kitchener

IFRS Two-Day Immersion Program

Wednesday, March 4 and Thursday, March 5, 2010

INTRODUCTION

With only months left before the date of adoption (January 1, 2011), this two-day workshop provides an overview of all significant IFRS requirements, presented by two expert instructors. It includes case studies, examples, exercises, and interactive participation from the participants. Designed as a condensed version of the IFRS Certificate program, this two-day workshop helps participants to acquire the tools necessary to understand and apply IFRS and prepare IFRS financial statements. The program includes the latest updates (including an update to changes to some of the listed standards), and participants are versed on all topics.

AGENDA

Day 1

- Introduction to IFRS and the IAS
- Financial Statement Presentation
- Revenue Recognition including Construction Contracts
- Provisions & Contingent Liabilities
- Inventory
- Property, Plant and Equipment
- Intangible Assets
- Impairment of Assets
- Borrowing Costs
- Non-Current Assets Held for Sale and Discontinued Operations
- Agriculture
- Accounting for Income Taxes
- Employee Benefits
- Share based payments
- Interim Reporting
- Related Party Disclosures

Day 2

- Financial Instruments and Hedge Accounting
- Leases
- Investment Properties
- Investment in Associates, Joint Ventures
- Business Combinations
- Consolidated and Separate Company Financial Statements
- Segmented Reporting
- Foreign Currency Transactions
- Implementation Processes and IFRS 1

WHO SHOULD ATTEND

This course is ideal for individuals at all levels within an organization who require knowledge of IFRS. In essence, it is an opportunity to transfer a crucial new skill set to those responsible for making accounting decisions, preparing, reviewing or approving IFRS financial statements. The program is generic and does not focus on any one particular industry.

Continuing Education Programs – Kitchener

IFRS Two-Day Immersion Program (continued)

WHO SHOULD ATTEND

This course is ideal for individuals at all levels within an organization who require knowledge of IFRS. In essence, it is an opportunity to transfer a crucial new skill set to those responsible for making accounting decisions, preparing, reviewing or approving IFRS financial statements. The program is generic and does not focus on any one particular industry.

INSTRUCTORS

Al Foerster, CA

LOCATION

Delta Kitchener Waterloo

Continuing Education Programs – London

Private Enterprise GAAP in Canada

Thursday, February 11, 2010

INTRODUCTION

The Accounting Standards Board has recently approved the most widespread changes to Accounting Standards for Private Enterprise to take effect January 1, 2011. If you are a private company and you are not adopting IFRS you will be required to adopt these standards to be in compliance with GAAP. This interactive workshop will help you sort through the standards and assess the implications for your organization.

TOPICS

- Financial Instruments
- Employee future benefits
- Intangible assets
- Goodwill impairment
- Stock-based compensation
- Asset retirement obligations
- Income taxes
- Investments
- Callable debt
- Leases

The Workshop will conclude looking at transitional requirements.

INSTRUCTOR

Al Foerster

LOCATION

London Delta Armouries

Continuing Education Programs – Ottawa

Advanced Excel

Monday, February 1, 2010

INTRODUCTION

Although many accountants consider themselves experts in using Excel, most accountants are self-taught and do not use Excel to its full potential. This course is designed to take experienced self-taught users to the next level. It provides real world examples developed by accountants for accountants in the following six major topic areas: collaboration and workbook security, using tables to analyze and report data, integrating and manipulating data from external sources, creating and auditing complex formulas, advanced data analysis with subtotals, and filters. Its content is based on twenty years of experience in delivering Excel training to accountants and on feedback from thousands of accounting and financial professionals just like you. If you use Excel extensively, you need this course! Participants will have access to sample data files.

This class will be taught in Excel 2007. References will be made to prior versions of Excel when there are differences. Users of all versions of Excel will benefit from this seminar.

KEY LEARNING OUTCOMES

- Protect documents using password encryption or Information Rights Management
- Remove hidden metadata from documents before distribution, digitally sign and restrict changes to Excel workbooks
- Save documents as PDF files for distribution by e-mail
- Use dynamic tables to automatically format and analyze data – creating, formatting, filtering, and using structured referencing
- Identify, filter, or remove unique or duplicate records
- Import or work with data stored in external databases, such as the General Ledger, using ODBC
- Use advanced techniques, such as Text to Columns to cleanup imported data
- Using advanced functions – SUMPRODUCT, VLOOKUP, HLOOKUP, MATCH, CHOOSE, WORKDAY, NETWORKDAYS, RAND, RANDBETWEEN, NPV, IRR, MIRR – to create complex formulas
- Create, manage, and use defined names to simplify formulas
- Perform advanced data analysis with data tables, subtotals, filters, PivotTables, and PivotCharts
- Use array formulas to round-off in totals and other useful tasks
- Use conditional formatting to create dynamic dashboard displays of tabular data

INSTRUCTOR

Alan Salmon

LOCATION

Hampton Inn Ottawa

Consulting CMA Workshops – Ottawa

Private Enterprise GAAP in Canada

Thursday, February 25, 2010

INTRODUCTION

The Accounting Standards Board has recently approved the most widespread changes to Accounting Standards for Private Enterprise to take effect January 1, 2011. If you are a private company and you are not adopting IFRS you will be required to adopt these standards to be in compliance with GAAP. This interactive workshop will help you sort through the standards and assess the implications for your organization.

TOPICS

- Financial Instruments
- Employee future benefits
- Intangible assets
- Goodwill impairment
- Stock-based compensation
- Asset retirement obligations
- Income taxes
- Investments
- Callable debt
- Leases

The Workshop will conclude looking at transitional requirements.

INSTRUCTOR

Al Foerster

LOCATION

Hampton Inn Ottawa

Consulting CMA Workshops – Ottawa

How will the Harmonized Sales Tax (HST) affect Your Business? – Half-Day Morning Workshop

Thursday, March 26, 2010

HST is only months away and yet some businesses will need to be ready as early as May 1, 2010. This timely and informative half-day workshop will provide basic knowledge to help you prepare for the HST. During this session participants will review and discuss important technical issues surrounding harmonization, including:

OVERVIEW

- HST transitional rules and planning for the transition (e.g. fixed price contracts, lease vs purchase).
- Place of supply rules and jurisdictional issues
- Rebates (transitional rebates, point of sale, MUSH)
- Restricted ITCs (based on Quebec model) and segregating data
- Sector specific issues (e.g. manufacturing, professional services, retail, construction, public sector and financial sectors)
- Planning strategies to enhance your PST/HST savings on operations and capital replacements

INSTRUCTOR

Jane Adams, FCMA

LOCATION

Hampton Inn Ottawa

SESSION HOURS

9:00 am – 12:00 noon

(Includes continental breakfast, before the session, and a refreshment Break)

Consulting CMA Workshops – Toronto

Essentials of Management Consulting Three-Day Workshop (CMC approved) (Day Two and Three)

Thursday, February 4 and Friday, February 5, 2010

INTRODUCTION

This workshop series is comprised of an introductory self study module, a one day course that overviews the tools that a management consultant will typically use, and a two day course that outlines a typical process for conducting a management consultancy “intervention” form the basis of a large portion of the core knowledge required to meet the basic competencies of the CMC designation.

WHO SHOULD ATTEND

This “Fundamentals” course is dynamic and interactive and will be valuable to management consultants wanting to deliver superior value to their clients, to anyone who is considering becoming a management consultant, and to any CMA who is pursuing the Certified Management Consultant (CMC) designation.

Special Note: The regular non-CMC member rate is \$1 875 for this 3 day course plus \$100 for materials. CMA Ontario is offering this course to members for \$1585 plus GST for all three days. You are also welcome to attend just the first day for \$595 plus GST. More details are available at the bottom of this catalogue in the registration form area.

INSTRUCTOR

Eric Cousineau, CMC, CMA, MBA

LOCATION

CMA Ontario – Professional Development Institute

Consulting CMA Workshops – Toronto

Professional Orientation Two-Day Workshop

Thursday, February 18 & Friday, February 19, 2010

INTRODUCTION

This workshop is designed to assist new Consulting CMAs in developing a successful practice.

PROGRAM

The topics that will be discussed on this two-day workshop are:

- Starting a Practice
 - Estimating Financial Requirements
 - Office Requirement
 - Library and Resources Requirements
 - Announcements
 - Advertisements
 - Stationery/Business Card
 - Practice Name
 - Building a Relationship with Your Banker
 - Sources of Financing
 - Developing a Business and Strategic Plan
- What to Charge and Managing an Assignment
- Preparing a Proposal
- Customer Service
- Understanding and Servicing Client Needs
- Developing and Maintaining Business Relationships
- How to Account for Time
- Billing and Collection Practices
- Developing a Peer Network
- Working with a Mentor
- Society Rules and Regulations

INSTRUCTOR

Professor Jon Kerr

LOCATION

CMA Ontario – Professional Development Institute

Consulting CMA Workshops – Toronto

Personal Tax

Monday, March 1, 2010

INTRODUCTION

Income tax matters never stay still. Personal tax legislation has undergone several major changes over the last few years, including many new provisions intended to address a variety of emerging issues, such as the changing dynamics of family life in an aging population (caregiver and disability issues, succession planning) and coping with the recent economic crisis (the home renovation tax credit). This course will also provide a review of recent and emerging trends in CRA administrative practices including the use of call centres, evolving collections practices, post-assessment review letters, and developments regarding charities and aggressive tax shelter schemes.

KEY LEARNING OUTCOMES

- Learn tax planning opportunities made available from recent tax changes.
- Develop an understanding of evolving tax administration practices and how they can affect you and your clients.
- Remain up to date on recent tax developments.
- Learn about emerging issues in tax law and practice.

WHO SHOULD ATTEND

This course will benefit accountants or tax preparation professionals who regularly prepare income tax returns on a regular or seasonal basis. This is not an introductory tax course.

INSTRUCTOR

Larry Tomlin, FCMA

LOCATION

CMA Ontario Professional Development Institute

Consulting CMA Workshops – Toronto

Consulting Skills Workshop

Friday, March 19, 2010

INTRODUCTION

This workshop is intended to introduce CMAs to the fundamentals of consulting to management.

WHO SHOULD ATTEND

This workshop is mandatory for all new Consulting CMAs.

PROGRAM

The topics that will be discussed on this one-day workshop include:

- Positioning and marketing yourself as a Consulting CMA
- Defining client needs
- Developing and pricing the proposal
- Data gathering methods
- Diagnosing the issues
- How to present and sell recommendations

INSTRUCTOR

Professor Jon Kerr

LOCATION

CMA Ontario – Professional Development Institute

Consulting Education Programs – Ottawa

Consulting Skills Workshop

Friday, March 26, 2010

INTRODUCTION

This workshop is intended to introduce CMAs to the fundamentals of consulting to management.

WHO SHOULD ATTEND

This workshop is mandatory for all new Consulting CMAs.

PROGRAM

The topics that will be discussed on this one-day workshop include:

- Positioning and marketing yourself as a Consulting CMA
- Defining client needs
- Developing and pricing the proposal
- Data gathering methods
- Diagnosing the issues
- How to present and sell recommendations

INSTRUCTOR

Professor Jon Kerr

LOCATION

Hampton Inn Ottawa

General Information

WORKSHOP HOURS

8:15 am – 9:00 am	Continental Breakfast and Registration
9:00 am – 12:00 pm	Morning Session
12:00 pm – 1:00 pm	Lunch
1:00 pm – 4:30 pm	Afternoon Session (consulting CMA Workshops will end at 5 pm)

CPLD INFORMATION

One-Day Workshop	8 credits
Two-Day Workshops	16 credits

CANCELLATION POLICY

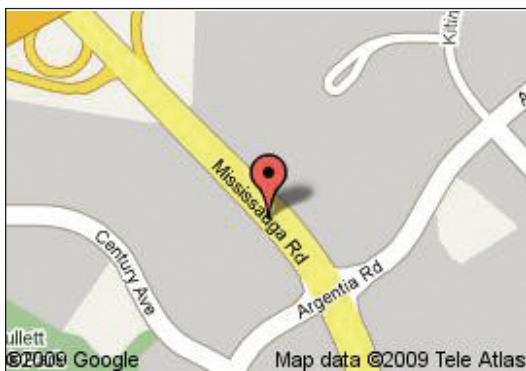
Cancellations more than one week prior to the workshop are subject to a \$50 administrative fee.

Cancellations within one week of the workshop are non-refundable.

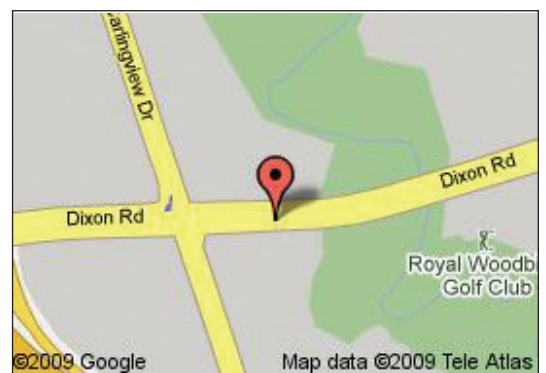
If you are unable to attend a workshop after you have registered, you may send a substitute at no charge – please inform CMA Continuing Education at Education@cma-ontario.org. Please note: substitutions are not permitted for the Consulting CMA Workshops

LOCATION DETAILS

Mississauga/Toronto Locations



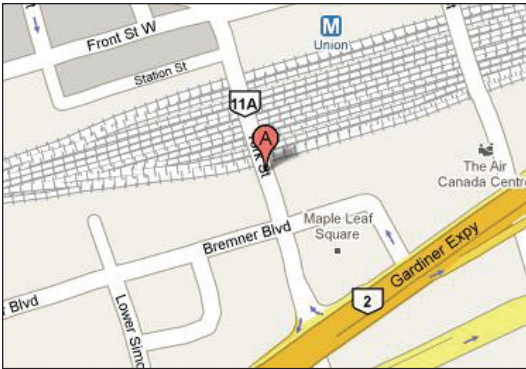
Delta Meadowvale
6750 Mississauga Road
Mississauga, ON L5N 2L3



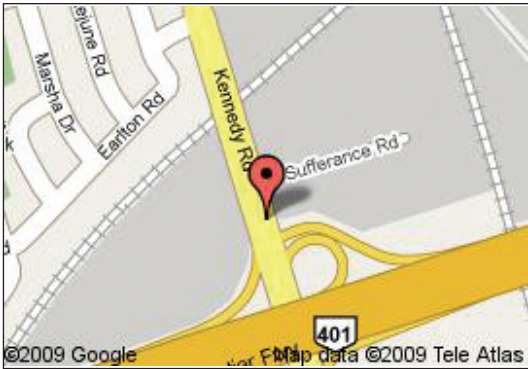
Toronto Marriott Airport Hotel
901 Dixon Road
Toronto, ON M9W 1J5

General Information

Toronto Locations

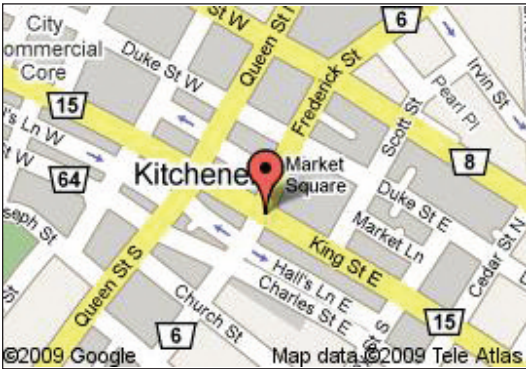


**CMA Ontario –
Professional Development Institute**
25 York St
Toronto, ON M5J 2V5



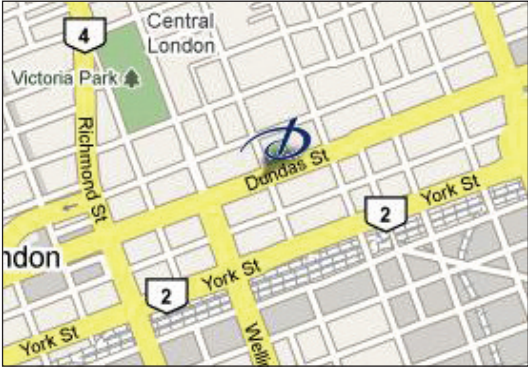
Delta Toronto East
2035 Kennedy Road
Scarborough, ON M1T 3G2

Kitchener Location



Delta Kitchener Waterloo
105 King Street East
Kitchener, ON N2G 2K8

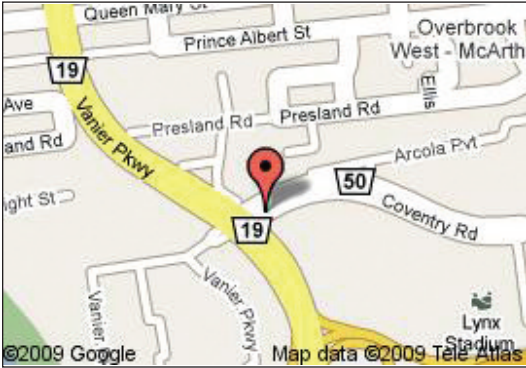
London Location



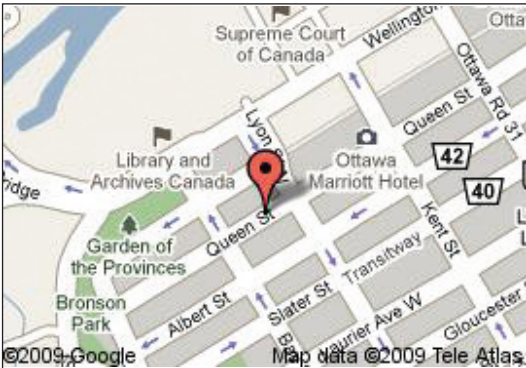
Delta London Armouries
325 Dundas Street
London, Ontario N6B 1T9

General Information

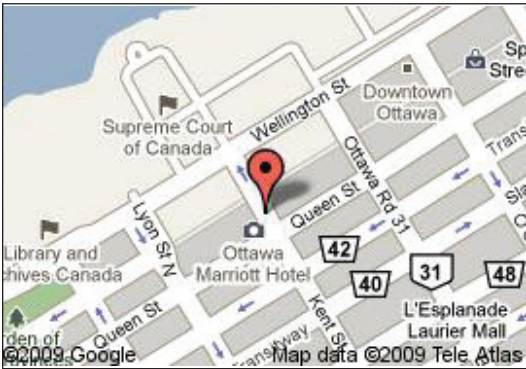
Ottawa Locations



Hampton Inn Ottawa
100 Coventry Road
Ottawa, Ontario K1K 4S3



Delta Ottawa Hotel and Suites
361 Queen Street
Ottawa, Ontario K1R 7S9



Ottawa Marriott Hotel
100 Kent Street
Ottawa, Ontario K1P 5R7

Registration

On-line registration & payment is available for this event using the Society's 'my CMA membership' portal. The 'my CMA membership' portal is currently separate from the Members' Private area with a different Login & Password. Your login is your CMA member number. You will select your own password by clicking on the link "Reset my Password", that you'll find on the login page. Once you've logged in, you may review the details of the event and register if you like, by clicking on the 'check out' button and providing your credit card information.

members.cma-ontario.org

We encourage you to use the link above and register on-line. If you'd like to register via FAX, please fill in the registration form below. If registering online, please email dietary restrictions to **Education@cma-ontario.org**

Registration Form

NAME _____ MEMBER NO. _____

TITLE _____

COMPANY _____

ADDRESS _____ SUITE _____

CITY _____ PROVINCE _____ POSTAL CODE _____

TELEPHONE # _____ FAX # _____

E-MAIL _____

<input checked="" type="checkbox"/>	Code	Date(s)	Topic	Member	Student/ Retired	Non-Member
	CEO	Feb. 1	Advanced Excel	\$450	\$405	\$550
	CET	Feb. 4	How will the Harmonized Sales Tax (HST) affect Your Business? – Half-Day Morning Workshop	\$295	\$250	\$395
	CECT	Feb. 4/5	Essentials of Management Consulting (Day 2 & 3))	\$945	\$945	\$1,045
	CET	Feb. 9	Excel Pivot Tables – Half-Day Morning Workshop	\$295	\$250	\$395
	CEL	Feb. 11	Private Enterprise GAAP	\$495	\$450	\$595
	CET	Feb 12	Managing IFRS Implementation	\$495	\$450	\$595
	CET	Feb. 18	Fast and Easy IFRS vs. GAAP Comparative Financial Statement Analysis	\$495	\$450	\$595
	CECT	Feb. 18/19	Professional Orientation Two-Day Workshop	\$595	\$595	\$695
	CET	Feb. 19	Excel Financial Reporting	\$450	\$405	\$550
	CET	Feb. 23	Enterprise Risk Management for Competitive Advantage	\$495	\$450	\$595
	CEO	Feb. 25	Private Enterprise GAAP	\$495	\$450	\$595
	CECT	Mar. 1	Personal Tax	\$495	\$450	\$595

Registration Form

<input checked="" type="checkbox"/>	Code	Date(s)	Topic	Member	Student/ Retired	Non-Member
	CEK	Mar. 4/5	IFRS Two-Day Immersion Program	\$945	\$900	\$1,045
	CET	Mar. 4	Business Strategies for Sustainability	\$495	\$450	\$595
	CET	Mar. 5	Managing Employee Engagement	\$495	\$450	\$595
	CET	Mar. 8	Managing Transfer Pricing	\$495	\$450	\$595
	CET	Mar. 9	IFRS and Fraud	\$495	\$450	\$595
	CET	Mar. 10/11	Two-Day Technology Workshop	\$945	\$900	\$1,045
	CECT	Mar. 19	Consulting Skills	\$325	\$325	\$425
	CET	Mar. 23	Balancing roles: The 360° employee – Half-Day Morning Workshop	\$295	\$250	\$395
	CET	Mar. 24	How will the Harmonized Sales Tax (HST) affect Your Business? – Half-Day Morning Workshop	\$295	\$250	\$395
	CET	Mar. 25/26	Two-Day IFRS Immersion Program	\$945	\$900	\$1,045
	CET	Mar. 26	Strategy Maps and the Balanced Scorecard in Government and Not for Profit Organizations	\$495	\$450	\$595
	CEO	Mar. 26	How will the Harmonized Sales Tax (HST) affect Your Business? – Half-Day Morning Workshop	\$295	\$250	\$395
	CECO	Mar. 26	Consulting Skills	\$325	\$325	\$425
			Sub-total \$			
			GST (5%) \$			
			TOTAL \$			

REGISTRATION FEE INCLUDES CONTINENTAL BREAKFAST, REFRESHMENT BREAKS AND LUNCH

GST REG NO. 123969610 RT0001

Program Code Legend

CEK – Continuing Education Workshop Kitchener
 CEL – Continuing Education Workshop London
 CEO – Continuing Education Workshop Ottawa
 CET – Continuing Education Workshop Toronto

CELS – Leadership Essentials Series Workshop Toronto
 CECL – Consulting CMA Workshop London
 CECO – Consulting CMA Workshop Ottawa
 CECT – Consulting CMA Workshop Toronto

Registration Form

PAYMENT	
Credit Card # (Visa/MasterCard) _____	Expiry Date (MM/YY) _____
Signature _____	

DIETARY RESTRICTIONS
Do you have any dietary restrictions? <input type="checkbox"/> No <input type="checkbox"/> Yes
If yes, please indicate: _____

If paying by cheque, please mail the cheque, payable to CMA Ontario, and this form to the address below.

If paying by credit card, you may submit this form by fax to 416-977-6079 or by mail to the address below.

FORWARD REGISTRATION FORM TO:

Meetings and Events Co-ordinator
CMA Ontario, 25 York Street, Suite 1100
Toronto, Ontario M5J 2V5
Fax: 416-977-6079

An administration fee of \$50.00 (plus applicable taxes) will apply for cancellations.

No refunds for cancellations within one week of workshop date. Substitutions accepted at no charge (does not apply to Consulting CMA Workshops).



**Certified
Management
Accountants**

25 York Street, Suite 1100
Toronto, Ontario M5J 2V5

416-977-7741

Fax 416-977-6079

Toll Free 1-800-387-2991

info@cma-ontario.org

www.cma-ontario.org