

Annual Update Sessions

Knowledge and connections for small to mid-size firms.

Our Annual Update Sessions will provide you with:



A summary of significant changes relevant for the upcoming year



Practical examples and guidance for implementation



An opportunity to discuss impact with professionals at firms with similar clients and services



Insight to assist with next year's planning

It has been another busy year for firms and we know it is hard to stay on top of firm administration projects and necessary annual updates. Our Annual Update Sessions have been tailored for small to mid-size firms servicing private enterprise and not-for profits.

- ASPE Accounting Standards for Private Enterprises
- ASNFP Accounting Standards for Not-for-Profits
- CSRS 4200 Compilation Engagements
- Tax Compliance and Tax Planning
- CAS Audit Standards Updates
- New Quality Management Standards
- Risk Management and Performance Management with guest colleagues

Join us for the entire series for up to 33.5 hours of verifiable CPD including up to 3 hours of ethics components. [Register here >](#)

Small to Mid-size Firm Focused CPD

Are you tired of attending standards update sessions which focus on public company or complex issues that are not relevant to the majority of your clients? If so, join us for our Annual Update Sessions which focus on common issues and provide practical guidance related to implementation and execution of standards that are relevant to firms with smaller clients.

We believe it is important to ensure training is made available to all staff involved in file preparation or review, which is why we have sessions that are designed for all levels of staff. Take only those sessions that are applicable for you.

Verifiable CPD certifications are available for each individual registration.

If you have multiple attendees, please contact us directly for discounted pricing.

For more information and pricing details, please contact Bridget Noonan at bnoonan@clearlineconsulting.ca.

Getting Started

Here's how it works:



Attend the live video conferencing update sessions (over 33 verifiable CPD hours are available)



Participate in live Q&As with practitioners on matters that impact your clients



Complete the attendance polling questions to receive a verifiable CPD certificate

Meet Your Instructors



Bridget Noonan, CPA, CA

Bridget is a Partner with Clearline Consulting and Clearline CPA and has over 20 years experience in the accounting industry, with a particular focus on practice management and regulatory compliance, as well as training and facilitating professional development.



Tom Gillespie, CPA, CA

Tom is a Partner at Clearline Consulting and Clearline CPA. He provides file monitoring, professional development and training, audit/assurance planning and on-going consulting services to CPA firms and practitioners, helping them succeed and build thriving practices.



Shane Shepens, CPA, CA

Shane is a Tax Partner at Clearline Consulting and Clearline CPA. He primarily focuses on income tax planning, reorganizations, and succession planning for Canadian owner-managed businesses in various industries, and the provision of tax services to other firms.



Gurbir Rai, CPA

Gurbir is a Tax Manager at Clearline CPA. He primarily focuses on private enterprise clients including personal and corporate planning, corporate restructuring, succession planning and all areas of compliance.



Contact us or register online for the 2022 Annual Update Sessions.

Annual Update Sessions Fall 2022



Update Sessions	Details	Presenter	Date	Time
Accounting Standards for Not-for-Profit Organizations – 2022 Update	From key standards updates to insights on compilation engagements, this session will provide not-for-profits with practical guidance on the latest ASNPO standards changes.	Bridget Noonan, CPA, CA	Oct. 20, 2022	11:00 - 1:00PM PT
ASNPO: Accounting Standards for Private Enterprises – 2022 Update	The 2022 ASPE update will focus on the new revenue recognition standard, and will also include brief reminders, common deficiencies, and new and updated standards changes to be aware of.	Tom Gillespie, CPA, CA	Oct. 20, 2022	8:30 - 10:30AM PT
Audit: Audit Procedures Using Excel and ActiveData	Join us for a session where we will show you how efficient analytics and exception testing can be performed in excel with the addition of an affordable plug-in. Go from excel general ledgers to review engagement analysis or detail audit testing in a matter of minutes.	Tom Gillespie, CPA, CA	Nov. 24, 2022	9:00 - 11:00AM PT
Audit: Canadian Audit Standards (CAS 315)	Through practical summaries and examples, gain an understanding of the areas of audit planning that will need to be either implemented or updated to meet compliance with CAS 315.	Bridget Noonan, CPA, CA	Nov. 3, 2022	8:30 - 11:30AM PT
Audit: Canadian Audit Standards (Everything Other than CAS 315)	Stay up to date with all incoming CAS requirements, identify when the requirements would be applicable, and learn how best to practically apply them to small audit engagements.	Bridget Noonan, CPA, CA	Nov. 3, 2022	12:30 - 2:30PM PT
Building Accountability: Creating High-Performing Teams	Join us as the team at Upskill Consulting walks through how to identify the core traits of a high-performing team, and reviews strategies to boost accountability and bring teams together.	Sofia Arisheh / Deanna Isfeld	Nov. 17, 2022	9:00 - 10:30AM PT
Creating a Coaching Culture: How to be a Better Mentor	Join us as the team at Upskill Consulting walks us through ideas and examples of how to engage with team members and become a stronger mentor or mentee.	Sofia Arisheh / Deanna Isfeld	Oct. 6, 2022	9:00 - 10:30AM PT
Compilations: CSRS 4200 Implementation Update	A walkthrough of the execution of a compilation engagement under the new CSRS 4200 standards, covering common deficiencies and best practices.	Bridget Noonan, CPA, CA	Sept. 22, 2022	10:00 - 12:00AM PT
CSQM Quality Management Suite of Standards	Discover the resources available through your Quality Management Guide subscription, including an overview of key forms and templates.	Bridget Noonan, CPA, CA	Sept. 23, 2022	8:30 - 11:30AM PT

Update Sessions	Details	Presenter	Date	Time
Practice Management: Legal Considerations in a Post-COVID Professional Services Environment	Jay Spiro of Spraggs Law will highlight HR-related legislative changes that may impact CPA firms, as well as firm policies and procedures for a post-COVID environment.	Jay Spiro of Spraggs Law	Nov. 17, 2022	11:00 - 12:30PM PT
Practice Management: Legal Issues Arising from Performance Management	Uncover the fundamentals of the employee/employer relationship from a legal perspective, as presented by Jay Spiro of Spraggs Law.	Jay Spiro of Spraggs Law	Dec. 1, 2022	9:00 - 11:00AM PT
Risk Management: Defensive Tax Practices	Did you know that over 60% of successful claims are tax related? Join Lorne Kotler of Kornfeld LLP as he walks through best practices in how to protect our firms from tax claims.	Lorne Kotler of Kornfeld LLP and Bridget Noonan, CPA, CA	Oct. 27, 2022	11:30 - 1:30PM PT
Tax: Current Flavour for Planning (Tax Planning)	What is new in the tax planning world? Join us as we review the more popular aspects of tax planning that we are carrying out for our clients.	Shane Schepens, CPA, CA	Oct. 27, 2022	8:30 - 11:00AM PT
Tax: Small Business Deduction	This seminar will review the association rules, the various grinds to the Small Business Deduction (SBD), and the Specified Corporate Income (SCI) rules.	Shane Schepens, CPA, CA	Oct. 13, 2022	11:30 - 1:30PM PT
Tax: T2 Preparation Training	Join us as we go schedule by schedule talking about the important and obscure items on how to properly complete a T2 return and what to look out for.	Gurbir Rai, CPA	Sept. 22, 2022	12:30 - 3:30PM PT
Tax: What's New in Tax (Corporate Update)	From changes to tax legislation to recent court cases to CRA technical interpretations, join us as we review the last year of important tax changes.	Shane Schepens, CPA, CA	Oct. 13, 2022	8:30 - 11:00AM PT



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