

For partners, by partners

To support partners in small and mid-size firms who may not have direct access to partner-relevant supporting resources, Clearline Consulting is hosting the Partner PD series.

This PD series goes beyond compliance issues to deliver the higher-level practice management conversation that is missing from our profession's standards-based CPD programming.

Our Partner PD series will provide you with compliant, partner-directed video conference sessions covering all aspects of accounting and assurance standards, risk mitigation strategies, and practice management issues that are impacting our firms today and in the coming years.



Sessions

Attend any sessions of interest in your applicable stream. These are LIVE sessions hosted over Zoom; please ensure the dates and times work for you. A certificate for verifiable CPD hours will be issued to each registered individual for all sessions attended. Each individual must have their own registration.



Practice Management Sessions

October 11, 2023 | 10AM – 12PM (PST) | Tax Planning for the Coming Year | 2 CPD

What is new in tax planning for the upcoming year? What are the key triggers to look out for to help identify tax planning opportunities for your clients? Join Shane Schepens as we review the top tax planning strategies and/or opportunities that we are discussing with our clients for the end of 2023 / 2024.

November 15, 2023 | 10AM – 12PM (PST) | Technology Tech Stack | 2 CPD

To get the conversation started, we will share Clearline CPA's current technology stack, what changes we are getting ready for and where we hope to end up. This is an open discussion, so be prepared to share your firm's successes and maybe more importantly, your firm's learnings with all in this session.

December 6, 2023 | 10AM – 12PM (PST) | Risk Mitigation in Public Practice | 2 CPD including 1 hr ethics

Each year we will dedicate one session to a risk mitigation conversation. In this final session of the Partner PD series, we will discuss changes in case law (if applicable), issues related to compliance with the provincial professional conduct requirements, or other risk management issues. Lorne Kotler of Kornfeld LLP will join us.

Included with all streams



Compilation Stream Sessions

September 20, 2023 | 10AM – 12PM (PST) | CSRS 4200 Compilation Engagements | 2 CPD

In this session we will debrief practice finding deficiencies in the implementation and application of the new requirements under CSRS 4200. The session will focus on practice management issues such as risk mitigation, internal processes and staff templates.

October 4, 2023 | 10AM – 12PM (PST) | Quality Management (CSQM1) | 2 CPD

The new quality management standards are effective for non-assurance firms as of December 14, 2023. In this session we will review the requirements at a high-level and review CPA Canada's quality management templates. Suggestions for how to document the requirements efficiently will be provided.

Includes access to all Practice Management sessions

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