

100% of participants recommend the Partner PD series. Here's what they're saying.

"Thank you! The sessions are always helpful and I come away with areas to look at improving within my firm."

"I really enjoy the format. It's helpful to have discussions with people who have similar objectives as me."

"While I most enjoy topics and discussions around practice management and tools and resources, I have found every topic valuable. I always leave with a list of things to consider or work towards."



Review Stream Sessions

October 18, 2023 | 10AM – 12PM (PST) | Fatal Flaws - ASPE and ASNPO | 2 CPD

Each year the profession publishes the common deficiencies in review engagements. In this session we will go beyond the common deficiencies and highlight the one-off fatal flaws that we encountered during our monitoring.

November 8, 2023 | 10AM – 12PM (PST) | CSRE 2400 Review Engagements | 2 CPD

In this session we will go over the common documentation deficiencies noted during monitoring in a review engagement file prepared using the Professional Engagement Guide (PEG) checklists. We will share tips in identifying these deficiencies during a high-level partner review.

Includes access to all Practice Management and Compilation Stream sessions

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Audit Stream Sessions

June 7, 2023 | 10AM – 12PM (PST) | Audit Practice Management | 2 CPD

As we all continue to work through the adoption of the revised audit standards (CAS 315), we will share learnings to date as a group. The session will focus on the implementation of the Professional Engagement Guide (PEG) audit checklists and how our audit approach has, or has not, changed.

September 27, 2023 | 10AM – 12PM (PST) | Audit Evidence and Sampling | 2 CPD

What qualifies as audit evidence? How much audit evidence is needed? How is professional skepticism applied and demonstrated? These are all questions we will discuss in this session, taking into consideration the firm's sampling methodology and reliance on controls.

November 22, 2023 | 10AM – 12PM (PST) | What's New and What's Coming | 2 CPD

Know what to look for in all your December 31 engagements and start working through changes to processes or templates for the fall. This session will ensure you are aware of all new accounting and assurance standards that are applicable for your year-end audits, and provide you with a roadmap for future changes.

Includes access to all Practice Management, Compilation and Review Stream sessions

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