

Partner PD Series

Knowledge and insights for partners in small to mid-size firms.

Join your colleagues in Clearline Consulting's Partner PD Series. Select the compilation, review or audit stream based upon your license and attend all the sessions of interest included within your stream. New this year is the addition of two optional Roundtable sessions for those who would like some dedicated time to exchange ideas and information.



Audit – \$1,375
Over 20 CPD hours
Includes all sessions



Review – \$1,075
Over 16 CPD hours
Includes all sessions



Compilation – \$675
Over 10 CPD hours
Includes all sessions



Practice Management and Taxation

What started as a group of audit partners focused on ensuring compliance with audit-related education requirements (IES 8), has transformed into a partner-centric PD series. The sessions are relevant, concise and focused on the topics that impact your firm and your clients.

Our sessions are limited to the typical services provided by small to mid-size firms for private enterprise and not-for-profit clients. As we do not practice in IFRS or PSAS, our sessions do not focus any time in these areas.

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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, taxation and practice management issues that are impacting our firms today and in the coming years.

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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 is available upon completion of a quiz on our learning management system (LMS) after each session. Each individual participant is required to have their own registration.



Practice Management and Taxation Sessions

May 16, 2024 | 9AM – 11AM (PST) | Changes to Capital Gains - 2024 Budget | 2 CPD | Recording will be available

The 2024 Federal Budget confirmed a long-anticipated increase in the capital gains inclusion rate, a change with wide-reaching implications starting June 25, 2024. Shane Schepens will guide you through an analysis of this change. This session includes real-life examples both pre and post-budget, covering commonly noted client scenarios. Gain insights into strategic tax planning considerations, from the General Anti-Avoidance Rules (GAAR) to the new rules around Alternative Minimum Tax (AMT), equipping you with the knowledge to advise clients.

October 23, 2024 | 9AM – 11AM (PST) | Tax Planning for the Coming Year | 2 CPD | Recording will be available

Stay ahead of the curve in tax planning for the coming year. Identify the critical indicators that could reveal tax planning opportunities for your clients. Join Shane Schepens as we walk through tax planning strategies and opportunities currently being explored with our clients for the latter part of 2024 and into 2025.

October 30, 2024 | 9AM – 11AM (PST) | GST / PST Considerations | 2 CPD | Recording will be available

Given all the questions around sales tax issues and the conversion of short-term rental properties to long-term residential rentals we have asked our GST/PST colleague to join us for a session. We will also go over hot topics GST and PST auditors are focusing on this year and provide considerations for other sales tax issues in construction and professional services.

December 4, 2024 | 9AM – 11AM (PST) | Risk Mitigation in Public Practice | 2 CPD including 1 hr ethics

Our annual risk mitigation session, co-facilitated with Lorne Kotler of Alexander Holburn, addresses a variety of legal issues faced by small and mid-size firms. Content is selected annually based upon trends or issues we identify within the accounting profession, with specific attention given to adhering to the provincial code of professional conduct, legal considerations around new accounting or assurance requirements, or preemptively managing firm risk. Note this is a **LIVE SESSION ONLY**.

Included with all streams



Roundtable Session - Live Open Discussion Session (optional)

November 13, 2024 | 9AM – 11AM (PST) | Roundtable Open Discussion Session | 2 CPD

This session offers partners a valuable opportunity to connect and exchange ideas and resources. This session is included in all streams for those who wish to join us for an engaging roundtable discussion. Topics will be decided by the participants. Note that this is a **LIVE SESSION ONLY**, a recording of the session will not be provided.

Included with all streams

For verifiable ethics CPD hours for 2024 we are going to focus on the 2021 updates to the Canada's Anti-Money Laundering and Anti-Terrorist Financing (AMLTF) regulations (online webinar). This aligns with required CPD for all CPAs in British Columbia and provides verifiable ethics hours in all other provinces. As part of the registration, you will receive an email with links to Free online resources provided by the profession.

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."



Compilation Stream Sessions

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September 25, 2024 | 9AM – 11AM (PST) | Compilations and Quality Management (CSQM1) | 2 CPD | Recording will be available

The new quality management standards, effective for non-assurance firms since December 14, 2023, are nearing their first anniversary. This milestone necessitates the completion and documentation of the firm's annual monitoring. As this may be a new process for some, our session will navigate the intricacies of internal monitoring. We'll also review practice deficiencies as noted in the application of the new compilation standards and collaborate on firm documentation and workflow solutions.

Includes access to all Practice Management and Taxation sessions



Review Stream Sessions

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September 18, 2024 | 9AM – 11AM (PST) | Accounting Standards 2024 Update (ASPE & ASNPO) | 2 CPD | Recording will be available

Given minimal changes in the accounting standards this year, we have combined the annual accounting update to include APSE and ASNPO. We will reiterate the effective date for previously issued standards and review guidance provided in new exposure drafts. For the remainder of the session, we will wrap up with highlights of the common deficiencies noted by practice review during the 2023/2024 inspection cycle, accompanied by practical guidance for application.

October 2, 2024 | 9AM – 11AM (PST) | CSQM Quality Management Annual Update | 2 CPD | Recording will be available

This session is designed for those tasked with the firm's quality management system. Together, we will identify the yearly updates necessary for the firm's risk assessment and response documentation, ensuring that the annual monitoring and required remediation are complete. The session aims to aid the firm in maintaining its quality management systems and processes, to prevent the documentation from becoming outdated.

November 20, 2024 | 9AM – 11AM (PST) | What's New and What's Coming – Assurance | 2 CPD | Recording will be available

Each year, we host a session to highlight areas of focus as we prepare for our December 2024 year-ends. Know what to look for in your December 31 review and audit engagements. We provide a summary of recent accounting and assurance updates, as well as highlighting updates to the Professional Engagement Guide (PEG) templates and other practice management recommendations.

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



Audit Stream Sessions

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May 30, 2024 | 9AM – 11AM (PST) | Audit Evidence and Sampling | 2 CPD | Recording will be available

This session tackles the essentials of audit evidence—what constitutes it, the sample required, and the exercise of professional skepticism. We'll explore these questions together and exchange ideas, considering your firm's approach to sampling and the testing and reliance on controls. This continuation from the 2023 CPD series is due to the delayed effective dates in the exposure draft for audit evidence.

October 16, 2024 | 9AM – 11AM (PST) | Canadian Audit Standards (CAS) 2024 Update | 2 CPD | Recording will be available

The aim of this session is to ensure you are current with all the latest CAS (Canadian Auditing Standards) developments, to discern which ones will affect your small or less complex audit engagements, and to deliberate on the most effective ways to apply these standards to these smaller-scale audits.

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