Boost your knowledge and serve your clients and organization better with CPA Canada’s unparalleled tax course offerings in:

- **Tax fundamentals** – Learn the fundamentals of *income taxes, indirect taxes, accounting for income taxes, U.S. tax, and scientific research and experimental development (SR&ED)*

- **Specialized income tax areas**
  - For general practitioners, an overview of critical income tax issues commonly faced in *income tax practice*
  - For tax professionals, advanced tax topics build proficiency in specialty areas like *owner-managed businesses, corporate reorganizations, transfer pricing, international taxation* and *indirect taxes*

- **Tax conferences** – Get the latest tax updates from leading tax experts and network with your peers at our annual forums on *income taxes for SMPs, commodity taxes* and – new for 2015 – *SR&ED*.

- The largest **elearning library** for CPAs in Canada. Learn at your own pace – from anywhere, at anytime!
WELCOME TO CPA CANADA’S LIFELONG LEARNING IN TAX PORTFOLIO

EXPAND YOUR KNOWLEDGE AND ADVANCE YOUR CAREER IN TAX

Introducing CPA Canada’s Fall/Winter Portfolio of tax courses – an unparalleled selection of learning opportunities from Canada’s premiere provider of high-quality, up-to-date tax education.

Whether you are in general practice, an aspiring tax specialist or a seasoned tax professional, selections from our catalogue can help you take your tax knowledge to the next level. And whether you work in a small or large public practice, industry, government or academia, our tax training products aim to raise the proficiency and effectiveness across the tax and accounting community.

Our rich variety of online and in-person learning formats – from self-learning to interactive group sessions to market briefs and conferences – allows you to benefit from the blend of options that best suits your schedule and needs. You will also benefit from learning methodologies based on solid contemporary research of the marketplace and best practices in continuing education.

TAX EDUCATION IN CANADA – SHAPING THE FUTURE

CPA Canada continues to invest in developing a context-rich, lifelong tax learning curriculum that meets the needs of all types of practitioners, delivered through the latest learning technologies and techniques.

Our new Continuing Tax Education Task Force was formed in 2014 to steer the development of our tax educational offerings. The task force evolved from the more focused team that guided top-to-bottom redevelopment of our flagship In-Depth Tax Course.

Chaired by Ernst & Young tax partner Greg Boehmer and comprising senior tax leaders from industry, academia and public practice, the task force’s mandate is to design a framework for tax-related educational programs to continue the educational advancement of Canadian tax practitioners who have completed the In-Depth Tax Course.

If you have ideas about tax learning that could help advance the task force’s mandate, email Vivian Leung, vleung@cpacanada.ca, program director for tax education.
## 2014/15 Lifelong Learning in Tax Events

Our Fall/Winter program features a variety of in-depth, specialized tax courses that build on the tax knowledge students gain through CPA Canada’s In-Depth Tax Course. Whether you are looking to build a base of tax knowledge to better serve your clients or looking for an update on recent tax issues, we have offerings that meet your needs.

Our tax fundamentals programs deliver education geared to new tax specialists, general practitioners and experienced tax professionals seeking to refresh their skills and broaden their knowledge. Our specialized tax courses aim to help seasoned tax professionals deepen their technical knowledge in complex taxation areas.

To find out about the variety of tax CPD products on offer from your Provincial Accounting Body, see page 15.

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*TP = TAX PROFESSIONAL  IND = INDUSTRY (NON-TAX SPECIALTY)  GPA = GENERAL PRACTITIONERS/ADVISORS*
In-Depth Tax Course

The most comprehensive tax training available in Canada, the *In-Depth Tax Course* equips students with the fundamental tax knowledge they need to succeed as tax professionals.

The *In-Depth Tax Course* is a three-year program that includes:

- a three-day orientation, research and communications session that equips students with the fundamentals of tax research and communication, and an overview of the tax landscape
- group study sessions that blend online learning and in-person components to enrich the learning experience
- three seven-day in-residence sessions
- a Certificate of Achievement upon the successful completion of the course.

Following a recent major redesign, the upgraded course preserves the curriculum's historical mix of theory and on-the-job experience while responding to changing student needs and the rising complexity of tax practice. Students also benefit from new technologies that deliver the program more efficiently and enrich the learning experience.

**WHO SHOULD ATTEND – TP**
Professional accountants in public practice, industry, government or legal environments who practise full time in tax and are serious about working as experts in the taxation area

**FIND OUT MORE**
For more information about the *In-Depth Tax Course*, entry requirements and registration, please visit [www.cpacanada.ca/InDepthTax](http://www.cpacanada.ca/InDepthTax)
A NEW WAY OF LEARNING!

Broaden your knowledge with four introductory courses on complex tax specialty areas

Developed directly from CPA Canada’s highly respected *In-Depth Tax Course* – our flagship tax program for over 40 years – our new *Tax Blended Learning Courses* offer you access to this respected program on a course-by-course basis for the first time. Choose to learn only the skills you need, in targeted tax areas. These stand-alone courses feature a blend of ebooks, online lessons and a half-day session that you can attend in person or virtually. The detailed introductions to these practice areas will be of special value to tax professionals in industry, general practitioners with multi-disciplinary practices, and tax practitioners who do not deal with these areas in their daily work.

NEW!

**Accounting for Income Taxes**

**Elearning – Available online in Fall 2014**

**Classroom session – November 5, 2014, Toronto, ON**

Learn the fundamentals of accounting for income taxes in Canada under both IFRS and ASPE with this introduction to basic concepts of accounting for income taxes (recognition, measurement, valuation, presentation, disclosure) and the key differences in how IFRS and ASPE deal with these issues. Build your knowledge base in the elearning portion of the course, then take part in a half-day classroom session – in person or online – the choice is yours.

**WHO SHOULD ATTEND – TP/IND/GPA**

• Professional accountants wishing to gain an introduction to accounting for income taxes in Canada
• Tax practitioners seeking a better appreciation of critical issues in accounting for income taxes

**TOPICS**

• GAAP for Accounting for Income Taxes of Canadian Entities
• Methodologies for Accounting for Income Taxes
• Temporary Differences and the Deferred Tax Methodology
• Taxes Covered under the Accounting for Income Tax Rules in IFRS and ASPE
• Deferred Tax Methodology under IFRS and Future Tax Methodology under ASPE 22
• Advanced Topics in Accounting for Income Taxes

**CPD CREDITS**

22.5 hours

**REGISTRATION**

$695 (plus taxes)

[www.cpacanada.ca/AFIT](http://www.cpacanada.ca/AFIT)

NEW!

**Indirect Taxes**

**Elearning – Available online in Fall 2014**

**Classroom session – January 20, 2015, Toronto, ON**

This course features an overview of the fundamentals of indirect taxes in Canada and covers key concepts in GST/HST, QST and PST, compliance obligations, and implications of common transactions. Build your knowledge base in the elearning portion of the course, then take part in a half-day classroom session – in person or online – the choice is yours.

**WHO SHOULD ATTEND – TP/IND/GPA**

• Professional accountants wishing to gain an understanding of indirect taxation in Canada
• Tax practitioners who need to gain a better appreciation for critical issues in indirect taxation

**TOPICS**

• Basic Concepts: GST/HST, QST and PST
• Registration Requirements for Residents and Non-Residents
• Compliance Obligations
• Indirect Taxes and Imports and Exports
• Intercompany Transactions
• Corporate Transactions and Reorganizations

**CPD CREDITS**

22.5 hours

**REGISTRATION**

$695 (plus taxes)

[www.cpacanada.ca/TaxesIndirect](http://www.cpacanada.ca/TaxesIndirect)

Register for one *Tax Blended Learning Course* at full price and receive a **$100 discount** on the registration fee of each of the other three courses!
NEW!

**U.S. Tax for the Canadian Tax Practitioner**

Elearning – Available online in Fall 2014  
Classroom session – January 21, 2015, Toronto, ON

Geared for the Canadian practitioner who wants to understand the fundamentals of U.S. corporate and individual taxation, this course reviews key concepts and highlights critical U.S. tax issues Canadian practitioners need to be aware of when dealing with client transactions south of the border. Build your knowledge base in the elearning portion of the course, then take part in a half-day classroom session – in person or online – the choice is yours.

**WHO SHOULD ATTEND – TP/IND/GPA**

- Professional accountants wishing to gain an introduction to U.S. individual and corporate taxation
- Tax practitioners seeking a better appreciation of critical issues in U.S. individual and corporate taxation

**TOPICS**

- Basic Concepts of U.S. Individual Taxation
- Canadians in the U.S. and U.S. Citizens in Canada
- Overview of U.S. Corporate Taxation
- Calculation of Federal Income Tax
- Overview of State and Local Taxation
- Administration and Other Topics

**CPD CREDITS**

22.5 hours

**REGISTRATION**

$695 (plus taxes)

[www.cpacanada.ca/USTax](http://www.cpacanada.ca/USTax)

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NEW!

**Scientific Research & Experimental Development**

Elearning – Available online in Fall 2014  
Classroom session – January 22, 2015, Toronto, ON

This course delivers an overview of the fundamentals of Canada’s Scientific Research and Experimental Development (SR&ED) program, including key benefits available to federal and provincial taxpayers, the types of eligible expenditures and compliance requirements for making a successful SR&ED claim. Build your knowledge base in the elearning portion of the course, then take part in a half-day classroom session – in person or online – the choice is yours.

**WHO SHOULD ATTEND – TP/IND/GPA**

- Professional accountants wishing to gain an introduction to SR&ED in Canada
- Tax practitioners seeking a better appreciation of critical issues in SR&ED in Canada

**TOPICS**

- Federal and Provincial SR&ED Programs, including SR&ED Deductions and Investment Tax Credits
- Definition and Application of Expenditure Categories, including SR&ED Salaries and Wages, Materials Consumed and Transformed, Contract Payments, Overheads and Capital Expenditures
- Filing Requirements
- Audit and Review Process
- SR&ED Tax Cases

**CPD CREDITS**

22.5 hours

**REGISTRATION**

$695 (plus taxes)

[www.cpacanada.ca/SRED](http://www.cpacanada.ca/SRED)

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Register for one **Tax Blended Learning Course** at full price and receive a **$100 discount** on the registration fee of each of the other three courses!
Advanced Tax Issues for the Owner-Managed Business

November 1–5, 2014
Niagara Falls, ON

This in-depth course is designed for tax professionals who work predominately with owner-managed businesses on estate planning, retirement and succession planning, or for those working in an industry setting who wish to expand their knowledge in this area. It offers an advanced format in which you can acquire innovative solutions to the most intricate financial situations that confront the business owner today.

WHO SHOULD ATTEND – TP
Tax professionals who:
• work predominantly or exclusively with owner-managed businesses on estate planning, retirement and succession planning
• work in an industry setting and wish to expand their knowledge in this area or need a refresher to keep up to date with emerging trends and strategies
• work in a government setting that deals with estate and succession planning matters

TOPICS
• Business Succession Planning
• Owner-Manager Remuneration
• Trusts
• Estate Freezes
• Post Mortem Tax Planning
• Life Insurance Planning

CPD CREDITS
Up to 25 hours

REGISTRATION
$4,195 (plus taxes)
Additional in-residence rate and facility fee apply

www.cpacanada.ca/ATIOMB

Income Tax Practice

WEST
November 1–7, 2014
Banff, AB

This in-residence course provides a sound understanding of the Income Tax Act, critical issues in current legislation and major changes proposed for the future. You will improve your ability to recognize tax problems, learn valuable tax planning techniques and achieve a better understanding of Canada Revenue Agency's current assessing positions.

WHO SHOULD ATTEND – GPA
Professional accountants and other professionals in a multi-disciplinary practice that includes providing tax services to clients

TOPICS
• Tax Practice Management
• Business and Property Income
• Partnerships and Trusts
• Personal and Corporate Tax Planning
• Estate Planning
• Non-Resident Issues
• International Expansion Considerations

CPD CREDITS
Up to 44 hours

REGISTRATION
$3,095 (plus taxes)
Additional in-residence rate and facility fee apply

www.cpacanada.ca/ITP
Corporate Reorganizations

November 8–12, 2014
Whistler, BC

This in-depth course covers the most recent technical amendments, current issues, techniques and strategies. It explores methods for effecting corporate purchases, sales and restructuring, delves into the detailed technical tax rules and examines numerous tax-planning opportunities.

WHO SHOULD ATTEND – TP
Tax professionals who:
• advise corporations on corporate reorganizations
• work in an industry setting and wish to expand their knowledge in this area or need a refresher to keep up to date with emerging trends and strategies
• work in a government setting that deals with corporate reorganizations.

TOPICS
• Interest Deductibility
• Paid-Up Capital and Related Issues
• Safe Income and 55(3)(a) Reorganizations
• Butterfly Issues and Spin-Offs
• Amalgamations and Wind-Ups
• Partnership Reorganizations
• Bump and Denial Rules

CPD CREDITS
Up to 25 hours

REGISTRATION
$4,195 (plus taxes)
Additional in-residence rate and facility fee apply

PRE-REQUISITE
• completion of CPA Canada’s In-Depth Tax Course or equivalent
• work full time in tax
• two or more years post In-Depth Tax Course work experience
• professionals not meeting these requirements may be admitted by special request

www.cpacanada.ca/CR

Navigating and Resolving Tax Disputes

February 10-11, 2015
Toronto, ON

This hands-on course steps back from the content of tax law to examine the skills practitioners need in tax controversies. Focusing on the progress of a federal tax dispute from planning to litigation, the course reviews key features of the audit, assessment and appeals process, with an emphasis on early resolution. You will also gain familiarity with the procedures for appealing a tax assessment, voluntary disclosures and rectification, along with the ethical issues tax advisors may face in resolving tax controversies. The course has been designed to be interactive and utilizes case studies throughout to illustrate concepts and help solidify understanding of key concepts.

WHO SHOULD ATTEND – TP
Tax professionals who:
• advise on tax disputes
• work in an industry setting and wish to expand their knowledge in this area or need a refresher to keep up to date with emerging trends and strategies.

TOPICS
• Topical Issues in Tax Disputes and Litigation
• Document Retention and Disclosure
• Audits and Assessments
• Objections and Settlements
• Tax Debts and Collections
• Penalties and Interest
• Taxpayer Relief, Voluntary Disclosures and Rectification
• Tax Court Appeals

CPD CREDITS
Up to 11.5 hours

REGISTRATION
$1,295 (plus taxes)

PRE-REQUISITE
• completion of CPA Canada’s In-Depth Tax Course or equivalent, or
• three years experience working in tax.
• professionals not meeting these requirements may be admitted by special request.

www.cpacanada.ca/NARTD

NOTE:
Content previously covered in the In-Depth Tax Course – Part 3 has been expanded and incorporated into Foundations in International Tax.
A new course on corporate reorganizations will be available in 2015.
For further information, visit: www.cpacanada.ca/InDepthTax
INTERNATIONAL TAX

Foundations in International Tax
Summer/Fall 2015

Building on the international concepts introduced in the In-Depth Tax Course, this intermediate in-depth course builds on the basic issues surrounding the taxation of foreign operations and effective planning strategies for minimizing tax for businesses that have expanded, or are considering expanding, outside Canada.

WHO SHOULD ATTEND – TP
This course is ideal for tax professionals who would like a comprehensive overview of Canada’s international tax system. As a guide, this course is ideal for practitioners who:
• advise corporations on cross-border taxation issues in:
  • specialized advisory firm practices
  • general firms with cross-border client files
• are responsible (internally) for the international taxation affairs of Canadian businesses
• work in a government setting that deals with international taxation files relating to Canadian businesses.

TOPICS
• International Tax Principles
• Canada-U.S. Tax Treaty
• Inbound Taxation
• Outbound Investments and Foreign Tax Credits
• Foreign Affiliate System: FAPI, Surplus Calculations, and Reorganizations
• Introduction to Transfer Pricing
• Introduction to U.S. Taxation

CPD CREDITS
Up to 25 hours

REGISTRATION
$4,195 (plus taxes)
Additional in-residence rate and facility fee apply

PRE-REQUISITE
• completion of CPA Canada’s In-Depth Tax Course or equivalent
• work full time in an international tax specialty group or have at least two years post-In-Depth Tax Course work experience
• professionals not meeting these requirements may be admitted by special request

www.cpacanada.ca/FIT

NEW!
Advanced International Tax

November 16–19, 2014
Niagara Falls, ON

Building on the concepts presented in the Foundations in International Tax Course, this program is an advanced study of Canada’s foreign affiliate rules. Students will work through complex foreign affiliate issues and examples involving characterization and interpretation questions, reorganizations, the computation of foreign affiliate surplus and foreign accrual property income determinations.

WHO SHOULD ATTEND – TP
Tax professionals who have significant knowledge of the foreign affiliate rules. As a guide, this course is ideal for practitioners who:
• advise corporations on cross-border taxation issues in:
  • specialized advisory firm practices
  • general firms with cross-border client files
• are responsible (internally) for the international taxation affairs of Canadian businesses
• work in a government setting that deals with international taxation files relating to Canadian businesses.

TOPICS
• Foreign Accrual Property Income
• Financing and IP Holding Companies
• Reorganizations
• Distributions and Surplus
• Loss Limitation Rules, Anti-Avoidance and Foreign Tax Credit Generators
• Partnerships
• Selected Inbound and Canada-U.S. Tax Treaty Issues
• Non-Canadian International Tax Issues

CPD CREDITS
Up to 25 hours

REGISTRATION
$4,195 (plus taxes)
Additional in-residence rate and facility fee apply

PRE-REQUISITE
• completion of CPA Canada’s In-Depth Tax Course or equivalent
• completion of CPA Canada’s In-Depth Tax Course – Part 3 or Foundations in International Tax Course
• work full time in an international tax specialty group or have at least four years post-In-Depth Tax Course work experience
• professionals not meeting these requirements may be admitted by special request

www.cpacanada.ca/AIT
In-Depth Transfer Pricing Course Part I

ELEARNING

Always Available

This elearning course provides grounding in the basic principles of Canadian transfer pricing and helps students explore the most critical issues that international businesses need to understand. Work at your own pace through modules, quizzes and pre-readings that you can access from anywhere with an Internet connection. The course also features two interactive webinars with a leading Canadian transfer pricing expert.

WHO SHOULD ATTEND - TP/IND/GPA
Professional accountants, economists, lawyers and other professionals who:
• advise or work for Canadian corporations with foreign operations and are responsible for transfer pricing, corporate or international taxation
• work in government dealing with international tax issues and transfer pricing

TOPICS
• OECD Guidelines, Canadian Legislation and Definitions
• Business Issues Related to Intercompany Transactions, Financial Transactions, Your Position within the Value Chain and Risk-Reward Profiles
• Transfer Pricing Methodologies, Financial Analysis and Statistical Methods
• Transfer Pricing Policies, Documentation, Financial Statement Disclosure and CRA Audit Activity

CPD CREDITS
Up to 11 hours, plus pre-reading

REGISTRATION
Part I: $595 (plus taxes)
www.cpacanada.ca/IDTPI

In-Depth Transfer Pricing Course Part II

IN-RESIDENCE

Summer 2015
Niagara Falls, ON

Part II of this course provides four days of intensive lectures and small break-out tutorials, a proven format that gives students an excellent opportunity to focus on the rigorous technical content while working through practical case studies and networking with their peers and some of Canada’s leading transfer pricing experts.

WHO SHOULD ATTEND - TP
Professional accountants, economists, lawyers and other professionals who:
• advise or work for Canadian corporations with foreign operations and are responsible for transfer pricing, corporate or international taxation
• work in government dealing with international tax issues and transfer pricing

TOPICS
• Intercompany Services
• Intangible and Tangible Property
• Business Restructuring
• Financial Transactions
• Interaction of Transfer Pricing with Other Tax Areas
• Dispute Resolution, Mutual Agreement Procedures, Advance Pricing Arrangements, Competent Authority and Transfer Pricing Review Committee
• Transfer Pricing in the Courts
• Panel Discussion with the Canada Revenue Agency.

CPD CREDITS
Up to 24 hours

REGISTRATION
Part II: $2,495 (plus taxes)
Additional in-residence rate and facility fee apply
www.cpacanada.ca/IDTPII
In-Depth HST/GST Course

The industry standard for training and a must-have for the serious indirect tax professional, this comprehensive indirect tax training course is for the new commodity tax professional and offers an excellent refresher for the experienced practitioner. Our In-depth offering begins with web-based, self-study lessons to bring you up-to-speed on the basics of indirect tax, followed by six days of intensive in-residence lectures and small, facilitated workgroups.

WHO SHOULD ATTEND - TP
- professional accountants and their teams who advise clients on HST and GST matters
- controllers, treasurers, finance executives and their teams who have responsibility for HST/GST within their organizations, big or small
- lawyers who counsel clients on HST/GST CRA, Department of Finance and provincial officials who focus or want to focus on sales and other indirect taxes.

TOPICS
- Research Techniques and Tools
- HST/GST Administration Tools
- Basic Concepts

In-Person
- Input Tax Credits (ITCs) and Rebates
- Net Tax Calculation, Timing Rules and Special Rules
- Purchase and Sale of Assets
- Public Sector Bodies (PSBs)
- Financial Institutions (FIs)
- Real Property
- Non-Resident Issues, Inbound Supplies and Exports of Property, Services and Zero-Rated Supplies

CPD CREDITS
34 hours

REGISTRATION
$3,195 (plus taxes)
Additional in-residence rate and facility fee apply

www.cpacanada.ca/IDHST_GST

ELEARNING

NEW!
Learn from anywhere at anytime with new, online Advanced GST/HST courses.

NEW!
Advanced HST/GST: Cross-Border Transactions

Always Available

A must-attend for professionals in industry who deal with cross-border activities, this course dives into the complex HST/GST areas of non-residents and cross-border transactions. With the new elearning version, you can stream the full two-day in-person course and access reference materials on your computer anytime, anywhere. Our nationally recognized faculty will enhance your knowledge of the technical HST/GST legislation and help you implement valuable strategies and practical solutions that have been successfully applied to real client situations.

WHO SHOULD ATTEND - TP
Tax professionals who have successfully completed the In-Depth HST/GST Course and other experienced professionals, including:
- accounting professionals, lawyers and others who advise clients on HST/GST matters
- CFOs and other finance professionals responsible for HST/GST compliance or oversight within their organization - big or small
- CRA, Department of Finance and other government officials who have some responsibility for HST/GST matters.

TOPICS
- Overview of GST/HST
- HST/GST and Non-Residents - Requirement to Register
- Non-Residents Not Registered - Avoiding or Recovering the Tax (including Drop Shipment rules)
- Registered Non-Residents: Registration, Reporting and Compliance Obligations
- Sector-Specific Issues: eCommerce, Continuous Transmission Commodities and Imported Financial Services

CPD CREDITS
12 hours

REGISTRATION
$695 (plus taxes)

www.cpacanada.ca/eCBTC
ELEARNING
NEW!

Advanced HST/GST: Public Sector Bodies
Always Available

This course will be especially valuable to professionals who advise public sector bodies (PSBs) and to employees and volunteers who work within a PSB. This elearning course gives you access to the full two-day in-person course and detailed reference materials captured and streamed directly to you and accessible 24/7 from your computer. Don’t miss out on your chance to learn from and interact with expert advisers who fully understand the unique GST/HST issues facing this sector.

WHO SHOULD ATTEND - TP
Tax professionals who have successfully completed the In-Depth HST/GST Course and other experienced professionals, including:
• accounting professionals, lawyers and others who advise clients on HST/GST matters
• CFOs and other finance professionals responsible for HST/GST compliance or oversight within their organization – big or small
• CRA, Department of Finance and other government officials who have some responsibility for HST/GST matters.

TOPICS
• Basic Concepts
• Taxation of Public Sector Bodies
• Outputs
• Inputs
• Special Situations
• Administration and Compliance

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12 hours

REGISTRATION
$695 (plus taxes)

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ELEARNING
NEW!

Advanced HST/GST: Financial Services
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This course will introduce you to the complex and dynamic indirect tax concepts and legislation for financial institutions, services and pensions. This elearning course gives you access to the full two-day in-person course and detailed reference materials captured and streamed directly to you and accessible 24/7 from your computer. Our nationally recognized faculty will enhance your knowledge of the technical HST/GST legislation while providing incredible insights into practical solutions that have been successfully applied to real client situations.

WHO SHOULD ATTEND - TP
Tax professionals who have successfully completed the In-Depth Indirect Tax Course and other experienced professionals, including:
• accounting professionals, lawyers and others who advise clients on HST/GST matters
• CFOs and other finance professionals responsible for HST/GST compliance or oversight within their organization – big or small
• CRA, Department of Finance and other government officials who have some responsibility for HST/GST matters

TOPICS
• Definitions of “Financial Service” and “Financial Instrument”
• Definition of “Financial Institution” (FI) Including Non-Traditional FIs
• HST and GST Compliance for Financial Institutions
• Special Rules for Seizures and Repossessions
• Pension Plan Rules and Input Tax Credits Relating to Financial Services
• Special Rules for “Selected Listed Financial Institutions” and use of the “Special Attribution Method”

CPD CREDITS
12 hours

REGISTRATION
$695 (plus taxes)

www.cpacanada.ca/eFSC
National Conference on Income Taxes for SMPs

October 6-7, 2014
(Optional Workshops – October 8, 2014)
Toronto, ON

This two-day conference plus optional workshops offers accounting practitioners (and those in industry) with the right mix of risk assessment technical updates and practical advice to help them tackle all of their clients’ income tax needs – with special focus on tax issues facing owner-managed businesses.

Sessions delivered by some of Canada’s most trusted income tax practitioners will arm you with deep insight into the latest legislative and administration changes. You’ll also get key tips, planning ideas and best practices that will help you unlock value for you and your clients.

WHO SHOULD ATTEND – TP/IND/GPA
• Small-to-medium-sized accounting and tax practitioners in public practice and in industries such as financial services, wealth management, mutual funds and life insurance.

TOPICS
• Tax Developments: Year in Review
• Cross-Border Tax Issues (Corporate and Personal)
• Compliance Nightmares: T1135s and More
• Case Law Update
• Taxpayer Bill of Rights
• Fireside Chat with the Canada Revenue Agency (includes latest on Registration of Tax Preparers!)
• Extended sessions on Succession Planning and How to Increase the Value of Your Practice

Post-conference workshops
(October 8, 2014, 9:00 a.m.-12:00 p.m.)
• The Art of Negotiating: Purchase and Sale of a Privately Held Business
• Tax Planning Strategies

CPD CREDITS
Up to 18 hours

REGISTRATION
$995 (plus taxes)
Workshops extra

www.cpacanada.ca/NCIT

NEW!

Scientific Research and Experimental Development Symposium

February 5-6, 2015
Toronto, ON

CPA Canada’s first two-day SR&ED conference will include a blend of technical and financial/accounting streams, with updates, analysis and very current interpretations from practitioners and government. The rich mix will offer exceptional value for both specialists and generalists while featuring panel discussions and debates with some of the field’s leading experts.

WHO SHOULD ATTEND – TP/IND/GPA
• professional accountants, lawyers and others who advise clients on SR&ED matters (both specialists and general practitioners)
• CFOs, controllers, treasurers and other financial executives and managers directly responsible for (or oversee) SR&ED compliance within their organization
• professionals in CRA, Department of Finance, and other government settings who are responsible for SR&ED matters

CPD CREDITS
Up to 17 hours

REGISTRATION
$995 (plus taxes)
Workshops extra

www.cpacanada.ca/SREDsymposium
Commodity Tax Symposium

NATIONAL
September 29–30, 2014
Optional Workshops:
September 28 and October 1, 2014
Ottawa, ON

WEST
March 2-3, 2015
(Optional Workshops: TBD)
Calgary, AB

These Symposia are annual gathering places for progressive professionals working or advising in commodity taxation. Containing a series of plenary sessions, concurrent presentations and keynote speakers addressing critical issues relating to HST, GST, PST, QST and Customs and Trade, the Symposia provide unprecedented networking opportunities in the marketplace.

The National Symposium features practical, insightful discussion of the most critical tax issues facing organizations and clients across Canada. The Western Symposium highlights indirect tax issues of special importance to businesses in Western Canada.

WHO SHOULD ATTEND – TS/IND/GPA
Professionals who are serious about working in or advising businesses in the area of indirect taxation:
• accounting professionals, lawyers, consultants and academics who research and advise in the areas of HST, GST, PST, customs and trade, and other indirect taxes
• senior executives and other professionals who lead internal commodity tax groups in industry and not-for-profit environments
• CRA, Department of Finance and provincial ministries of finance representatives charged with policy and compliance initiatives relating to sales taxes and other indirect taxes

TOPICS
• exciting discussion and debate about policy direction
• insights and advice on risk management related to commodity taxation issues
• detailed sessions on financial services, customs, environmental fees and more
• new and influential case law
• annual Canada Revenue Agency Roundtable, keynote speakers and more

Optional workshops (National Symposium only; West Symposium topics TBD):
• Maximizing Your ITCs: Allocation Methods – October 1, 2014
• Completing the GST 111/FP 2111 – October 1, 2014

Note: The October 1, 2014 Symposium Workshops run concurrently.

CPD CREDITS
National – Up to 21 hours
West – Up to 17 hours

REGISTRATION
National – From $1,595 (plus taxes)
West – From $995 (plus taxes)

www.cpacanada.ca/CTS
www.cpacanada.ca/CTSWest
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See the October issue of CPA Magazine for details.