

## Practitioners' Forum - Okanagan

### Agenda

September 14, 2017

Phoenix Steakhouse and Bar  
3117 30<sup>th</sup> Avenue, Vernon, BC  
11:45 a.m. – 1:30 p.m.

(Bring this agenda with you to the meeting)

#### Welcome

- New member introductions

#### Discussion:

- Examples of a “Paperless Office”
- Consultation Paper on “Compilation Engagements”
- Policy Paper “Tax Planning using Private Corporations”
- Upcoming tax changes that might impact small practices
- Open Forum for Question and Answer (general)
- Attachments:
  - o AcSB Update on Standards (info only)
  - o Compilation Engagement Discussion Paper
  - o Article “More Proposed Reforms to Small Business Taxation”

#### PD Courses:

- September 20 – Two PD ethics courses offered in Kelowna (members are required to complete 4 hours of business ethics every three years).
- September 21-22 – Fall Summit held in Kelowna.  
<https://www.bccpa.ca/news-events-publications/events/2017-fall-pacific-summit/>
- October 25 PD Nexus – Public Practice Insights (formerly Practitioners’ Potluck). A PD conference for public practitioners held in Vancouver.
- October 28-November 2, in residence CPA Canada course “Income Tax for the General Practitioner” in Kelowna.  
<https://www.cpacanada.ca/en/career-and-professional-development/courses/core-areas/taxation/personal-tax/income-tax-for-the-general-practitioner>

#### Close of meeting

- Complete the evaluation and provide suggestions for future discussion
- Next meeting date – TBD

**\*\* Meeting Etiquette \*\***

We request members respect the following meeting etiquette:

- Come prepared to share ideas and comments with your peers. When you share your thoughts, please be professional and resist the temptation to complain.
- Confirm your attendance by registering using the e-Ply link that is sent prior to each meeting. E-PLY is used to track attendance, pre-order food and to produce sign in sheets which are collected by CPABC to validate eligibility for verifiable CPD.
- Only eligible members are permitted to attend forum meetings so do not share the registration link. Members may become a forum member by expressing their interest to CPABC and satisfying eligibility. Information about the forums can be found on the CPABC website under Members\Connect\Member Forums. Direct all interested public practitioners to this area.
- If you are unable to attend, please advise Tierra Pawluk using [tpawluk@bccpa.ca](mailto:tpawluk@bccpa.ca) at least 3 days prior.
- Failure to attend two forum meetings that the member has previously registered for without the member providing adequate cancellation notice may result in removal from the forum list.
- CPABC subsidizes the meal/venue cost. This subsidy though does not cover alcoholic beverages or items specially ordered by the member that are not on the set menu. Members may order these items but are requested to settle their own bill for these items prior to leaving the venue. Failure to settle your bill will result in removal of the member from the forum list.
- Complete the event evaluation form which will be emailed to you after the meeting. The evaluation assesses the quality of the forums meetings and encourages idea generation.