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MAY/JUNE 2026

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and award winners



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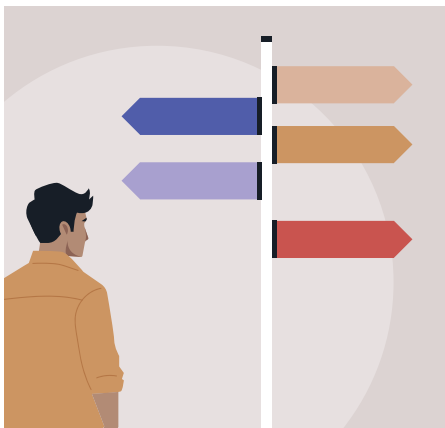
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Lisa Abbate, CPA, CA
CFO, Vancouver Whitecaps FC



Bobo Zhao Photography



CPABC **INFOCUS**

May/June 2026, Vol. 14, No. 3

CPABC in Focus is the flagship magazine of BC's chartered professional accountants.

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Mailing address: #800 - 555 West Hastings St., Vancouver, BC, V6B 4N6

Publications mail agreement no. PM 40069584



Building Pathways to the Profession

As my term as your chair draws to a close, I want to extend my heartfelt appreciation to my fellow board members and to CPABC's senior leadership team. Your commitment and collaboration over the past year have made this experience both rewarding and enjoyable, and it is with full confidence that I'll be handing over the role to my successor during CPABC's virtual AGM on June 23.

Sustaining the profession's relevance in an increasingly complex and rapidly evolving environment will continue to be a high priority for the board in 2026/2027, enabling CPABC to continue to attract people to the CPA program and the profession. Recruitment priorities will remain focused on post-secondary students, Indigenous youth, career changers, and high school students, and we will continue to promote the value of the CPA designation to prospective learners and employers while also strengthening relationships with partner organizations—especially within Indigenous communities, as we seek to deepen engagement with Indigenous students (see pages 28-30 for an update on CPABC's Indigenous Engagement Strategy).

Each of us can play a role in highlighting the strength and versatility of the CPA designation by sharing our unique experiences. To that end, I encourage you to view the on-demand CPA Amplify webinar to learn how to tell your own CPA story well.

In addition to showcasing the range of opportunities available to CPAs, it's important to celebrate member accomplishments. Accordingly, you'll find profiles of our newest Member Recognition honourees on pages 14-26. It was an honour to celebrate their achievements at CPABC's recent Member Recognition Dinner (pages 46-47).

As I reflect on my time as a CPABC board member and chair, I'm reminded of the profound value of volunteerism. Working alongside my peers has enriched both my professional journey and my personal life. My last message to you is to consider getting involved, whether through your local chapter, a forum or committee, a recruitment initiative, or the board. Engaging with your CPA community will help you build invaluable connections and skills that will support growth at every stage of your career. ■



Alain LeFebvre, FCPA
CPABC Chair

Enhancing Service and Stewardship

I want to start by extending my sincere appreciation to Alain for his outstanding leadership as board chair in 2025/2026. His steady guidance and thoughtful stewardship have been invaluable, particularly during a year marked by significant change across the profession. Your contributions have made a meaningful difference, Alain, and we are grateful for your service.

This fiscal year, we are continuing to strengthen CPABC's regulatory role. Recognizing that the regulatory landscape continues to grow more complex, with heightened expectations and increased scrutiny, we remain focused on delivering timely and effective regulatory outcomes while also advancing important digital enhancements.

Recruitment, as Alain noted, remains a key priority, especially given recent changes to immigration policy that are affecting the learner pipeline. Progress continues on the new CPA Professional Program through the CPA Western School of Business, which will be an important enabler of future recruitment efforts. Significant work will take place over the next two years to ensure the program is ready to launch and well positioned to meet the evolving needs of learners and the public we serve.

We remain committed, as well, to enhancing the resources and opportunities that we provide to members, candidates, students, and the public. To support member development, for example, we are continuing to expand our roster of high-quality learning opportunities delivered live and/or on-demand, and we're building on the strong response to the inaugural Infinite Conference by planning the next conference in 2026. Additionally, we're continuing to strengthen internal training to ensure that CPABC can provide equitable and inclusive experiences for members, candidates, students, and the public.

As we undertake these activities, we're also continuing to provide valuable and relevant services, including supports for mental wellness. Recognizing that May 4-10, 2026, is Mental Health Week in Canada, we've included some wellness-related content in this issue of the magazine. ■



Lori Mathison, FCPA, LLB
CPABC President & CEO

AGM ANNOUNCEMENTS

Save the Dates: AGMs for CPABC and CPA Yukon

British Columbia: June 23, 2026

CPABC will hold its 2025-2026 annual general meeting (AGM) virtually on Tuesday, June 23, 2026. Details and meeting materials will be posted to bccpa.ca in late May.

Yukon: June 16, 2026

CPA Yukon will hold its 2025-2026 AGM in person in Whitehorse on Tuesday, June 16, 2026. Details and meeting materials will be posted to bccpa.ca/cpa-yukon in late May.



photo_Pawel/istock/Getty Images

MEMBER RECOGNITION

Shine the Spotlight:
Nominate a Peer for Member Recognition

If you know a CPA who's making impressive contributions to the business community, the accounting profession, and charitable organizations, we invite you to spotlight their positive influence and achievements by nominating them for CPABC's Member Recognition Program in one of the following categories:

- Early Achievement;
- Distinguished Service;
- Fellowship; and
- Lifetime Achievement.

Nominations are also welcome for the Honorary CPA designation, which recognizes the executive accomplishments of non-members who have made a significant contribution to the accounting profession.

All nominations for the 2026 program must be received by CPABC by 4:00 p.m. on Monday, September 14, 2026. To learn more about the different awards and the nomination process, visit bccpa.ca/member-services/recognition-program.



Esperanza33/istock/Getty Images

Your nomination matters!

Help call attention to a CPA who's truly making a difference, like the honourees profiled on pages 14-26 of this issue.

Four Outstanding Leaders Recognized at 2026 IWIB Awards



The 2026 Influential Women in Business Award honourees (l to r): Haleh Alexander, Christy Smith, Maryam Sadeghi, and Bridgitte Anderson. Photo courtesy of *Business in Vancouver*.

CPABC was pleased to support the 2026 Influential Women in Business (IWIB) Awards luncheon, presented by *Business in Vancouver* at the Vancouver Club on March 6, 2026, ahead of International Women's Day. The annual IWIB Awards recognize exceptional and inspiring leaders across a range of industries who are shaping British Columbia's business community.

The 2026 recipients are:

- **Haleh Alexander** – Regional Vice-President, National Bank of Canada;
- **Bridgitte Anderson** – CEO, Greater Vancouver Board of Trade;
- **Maryam Sadeghi** – CEO, MetaOptima; and
- **Christy Smith** – Senior Vice-President, Indigenous Interests and Community Well-Being, Falkirk Environmental Consultants.

To learn more about the honourees, visit biv.com/iwib.

Nominate a CPA for an IWIB Award

Nominations for the 2027 Influential Women in Business Awards are now open. Visit biv.com/iwib for details.

REGULATORY REMINDERS

IMPORTANT:

**2026/2027 Membership Dues
Are Now Past Due
DEADLINE WAS APRIL 1, 2026**

CPABC acknowledges and thanks the members who paid their membership dues on time. Timely payment minimizes the administrative cost of following up on collections.

If you have not yet paid your 2026/2027 membership dues, please do so before May 31, 2026, to avoid the late payment administrative fee, which places the additional cost of collections on those members who pay late.

An email notification was sent to each member in late February 2026 indicating that the payment deadline for 2026/2027 member dues was April 1, 2026. If you did not receive this email, log in to services.bccpa.ca to ensure that your email address is up to date in your member profile. As required by the *CPABC Bylaws*, members must provide a current email address and immediately notify CPABC of any changes (see right for more details). This is to ensure that you receive important regulatory messages from CPABC.

To view your membership dues notice online, visit services.bccpa.ca. You can print the notice for your records and pay your dues electronically.



Keep Your Contact Information Current



miniserries/E+/Getty Images

Is your contact information up to date?

This is a friendly reminder that the *CPABC Bylaws* require members and candidates (students enrolled in the CPA Professional Education Program) to provide CPABC with the following contact information:

- Your current email address;
- Your current mailing address;
- Your current business or employment address; and
- Your current municipality of residence.

You are required to keep your contact information up to date by immediately informing CPABC of any changes. This is to ensure that you don't miss any important communications from CPABC, including information about your annual membership dues and other fees. Additionally, every member with a public practice licence is required to provide CPABC with the current street address for every authorized practising office in BC.

To avoid missing any important communications, please add CPABC to your safe-sender list. If you find CPABC emails in your spam folder, make sure to mark them as "not spam" so that they reach your inbox.

How to update your contact information

- **Members:** Log in to services.bccpa.ca and select the "Profile" tab. Contact CPABC at memberrecords@bccpa.ca if you need assistance.
- **Public practitioners:** To update a firm address, office address, or professional accounting corporation address, contact publicpracticelicensing@bccpa.ca.
- **Candidates:** Log in to the My CPA Portal at my.cpawsb.ca. Contact CPAWSB at cpaapplication@cpawsb.ca if you need assistance.

To protect your privacy and security, be sure to use the email address that is on record with CPABC whenever you communicate with us by email.

ABOUT THE NEW FUNDING MODEL

Understanding the New Funding Model: A Quick Rundown of Your 2026/2027 Membership Dues

If you missed our announcements about the new funding model in the January/February 2026 (page 9) and March/April 2026 (page 7) issues of the magazine or in our biweekly *eNews*, the following article provides a summary of the changes.

Transition date

As of April 1, 2026, CPA Canada membership became optional. Any CPABC members who wish to continue to belong to CPA Canada must now register and pay dues directly to CPA Canada, as the provincial/territorial bodies, including CPABC, will no longer collect these fees on members' behalf.

2026/2027 dues schedule

This change is reflected in CPABC's 2026/2027 dues schedule. The updated CPABC dues align with the new national funding model, which took effect on April 1, 2026. CPABC's mandatory fees are set to cover the core operational costs required for us to fulfil our regulatory mandate and provide essential services to members, which include providing access to the *CPA Handbook*, standards, and guidance. These fees also fund key activities that ensure the profession is well-supported and the public interest is protected.

For 2025/2026, the mandatory fee was \$1,055 plus tax and included funding for standards, guidance, and pre-certification. For 2026/2027, the mandatory fee was reduced to \$955 plus tax, even though CPABC continues to provide funding for the same core elements.

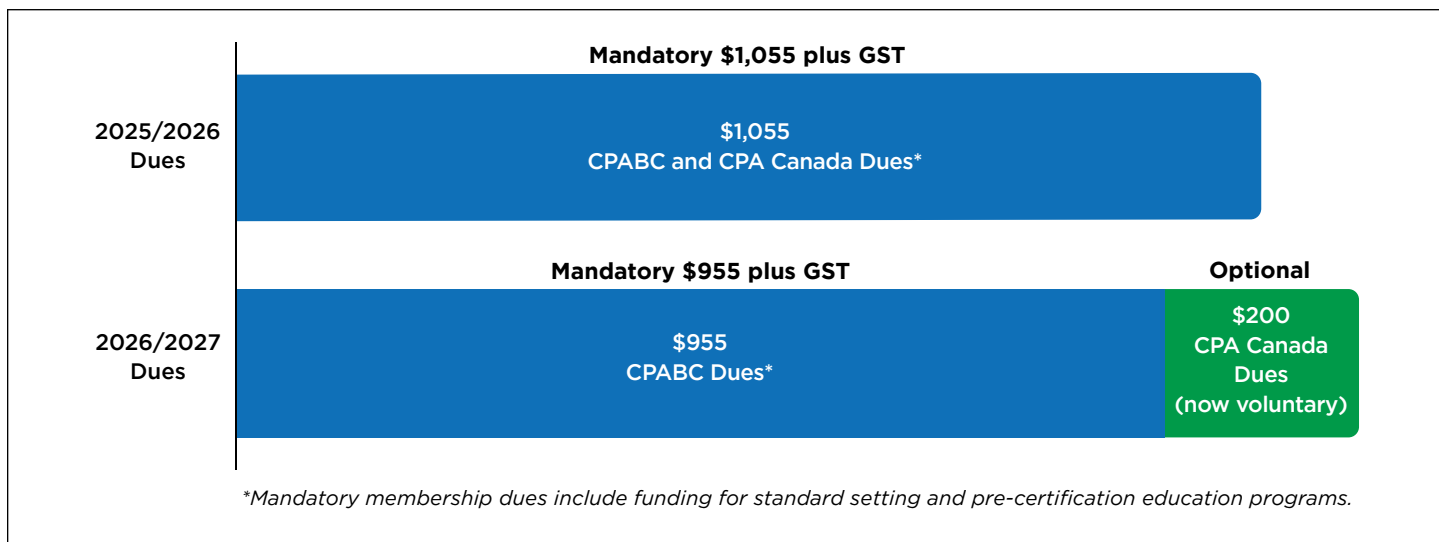
The chart below provides a comparison of the previous mandatory dues and the current mandatory dues, as well as the new CPA Canada optional dues.

Designation use

To use the CPA designation in British Columbia, CPAs must continue to maintain their CPABC membership. Your CPA designation, rights, member services, benefits, and privileges are derived from your continued membership with CPABC. This includes being eligible to seek membership with other provincial and territorial CPA bodies for interprovincial mobility, regardless of whether you choose to maintain a membership with CPA Canada.

More information

In summary, membership with CPA Canada is now optional, and any related fees are voluntary. For full details about the new funding model, including deadlines and next steps, visit bccpa.ca/2026-2027-membership-and-dues-changes.



Erratum:

In the dues notice on page 7 of our March/April 2026 issue, the URL should have been updated to bccpa.ca/member-services/membership-information/2026-2027-member-dues.

RESOURCES FOR EMPLOYERS AND JOB SEEKERS

Strengthening the Talent Ecosystem

Committed to fostering a strong and resilient talent ecosystem, CPABC’s employer relations and talent development (ERTD) team provides customized programming that supports and connects employers, CPA members, candidates, and students throughout the province. Here’s a look at some recent ERTD events:

Career Week

In February 2026, ERTD’s flagship Career Week event provided virtual programming for 30 employers from diverse sectors and over 600 attendees, along with in-person opportunities for networking and career exploration.

Online offerings included:

- An overview of the current job market from Robert Half;
- A panel discussion in which employees from LLT, Trez Capital, Shadow Strategies, and Tru Cooperative Bank (formerly First West Credit Union) shared personal career insights;
- A session highlighting opportunities for Indigenous and non-Indigenous professionals with panellists from BC First Nations Gaming Revenue Sharing, Huu-ay-aht First Nations, First Nations Financial Management Board, and private practice;
- A discussion with representatives from SWIM Recruiting, Colliers International, and Davidson & Company; and
- A session on personal branding.

In addition, CPABC partnered for the first time with International Coaching Federation (ICF) to give attendees access to live, one-on-one career coaching sessions—55 sessions were held in all! CPABC thanks ICF’s volunteer coaches and everyone who participated in this event, including the following organizations:

- | | |
|--|---|
| • Aston Carter | • Invictus Accounting |
| • Baker Tilly | • LLT |
| • BDO Canada | • Lohn Caulder |
| • Burke Recruiting | • Manning Elliott |
| • Charlton & Company | • MNP |
| • Clearline | • Mosaic |
| • Crowe MacKay | • Office of the Auditor General of British Columbia |
| • Davidson & Company | • QuadReal |
| • Deloitte | • Randstad |
| • DMCL | • Rise |
| • Doane Grant Thornton | • Robert Half |
| • First Nations Financial Management Board | • Rolfe Benson |
| • Galloway Botteselle & Company | • Smythe |
| • Horizon Recruitment | • Strive Recruitment |
| • International Coaching Federation | • SWIM Recruiting |
| | • WELL Health |



Evorona/istock/Getty Images

Speed Interviews Night

On February 26, ERTD hosted CPABC’s Speed Interviews Night at SFU Harbour Centre, bringing together accounting professionals and employers for quick, high-impact interview rotations. The event gave participants the chance to connect with multiple public practice and industry employers, gain real-time insights into hiring needs, and showcase their skills.

We thank everyone who participated in this event, including the following organizations:

- | | |
|---------------------------------|---------------------------------|
| • Advinor | • Gwa’sala-’Nakwaxda’xw Nations |
| • Davidson & Company | • Loren Nancke & Company |
| • De Visser Gray | • McLaren Trefanenko Inc. |
| • DMCL | • WELL Health |
| • Galloway Botteselle & Company | |

Mentor Mindset webinar

On March 3, ERTD hosted “Supporting You as a Mentor: Spring Resource Refresher,” as part of CPABC’s Mentor Mindset webinar series. This latest webinar reviewed the resources available to CPA mentors, offered a brief leadership-style self-assessment, and featured small-group breakout discussions tailored to mentors in the experience verification and pre-approved program routes. Offered quarterly, the 60-minute Mentor Mindset webinars are open to all CPA mentors and eligible for CPD hours.

AI for Leaders event

On March 18, ERTD hosted an in-person panel and networking event entitled “AI for Leaders” at BCIT’s Tech Collider space in Vancouver. The event, which focused on strategy, change, and workforce readiness, was moderated by Jennifer Duffy, CPA, CA, financial management department chair at Langara College, and featured panellists from PwC, SIA, and Treewalk.

Roughly 100 senior leaders attended the event, which included an engaging Q&A session. The event wrapped up with a networking reception during which participants had a chance to connect with peers, exchange ideas, and continue the discussion in an informal setting.

Cybersecurity Essentials for SMBs webinar

On April 23, ERTD hosted “Cybersecurity Essentials for Small to Mid-Sized Businesses” (SMBs). The webinar examined why and how SMBs are vulnerable to cyberattacks, described the top threats to watch for, provided practical tips to secure systems and data, and explained how to build a cybersecurity culture without breaking the bank.

Interested in participating in these kinds of activities? Connect with the ERTD team at careers@bccpa.ca to learn about upcoming opportunities.

CASE COMPETITION

2026 CPABC Business Case Competition: Showcasing Tomorrow’s Financial Leaders

This year marked the 13th instalment of CPABC’s annual Business Case Competition, a fun and challenging event that sees post-secondary students across British Columbia apply their financial skills and critical thinking to real-world business case analyses.

Between January 30 and February 1, 2026, 62 teams submitted video entries for the first round of the competition. For this virtual phase, teams had 48 hours to review a business case and demonstrate their knowledge of managerial accounting concepts, including analyses, projections, and planning.

Eight teams advanced to the second (final) round on March 21, which was held in person at the Westin Wall Centre, Vancouver Airport in Richmond, BC. They represented the British Columbia Institute of Technology, Capilano University, Langara College, Okanagan College, Simon Fraser University, the University of British Columbia, and Vancouver Island University.

Teams were given three hours to review and analyze a business case written by the advisory practice Treewalk before submitting their recommendations to a judging panel comprised of volunteers: **Rob An, CPA; June Lee, CPA, CMA; Diksha Singhal, CPA; and Joyce Zhu.*** The judges assessed competitors on their presentation style, case knowledge, strategic implementation, creativity, and handling of rapid-fire questions.

Participants from the first round then joined the final eight teams at the Westin Wall Centre for a celebratory evening reception, where prizes were awarded to the top three teams:

- **First place:** “Team Strategem” from UBC (Gavin Fung, Carter Jaquette, and Samantha Ng).
- **Second place:** “Team HACK Consulting” from BCIT (Kurt Mack, Cole Shefford, Aryan Singh, and Hugo Spence).
- **Third place:** “Team Compass Consulting” from SFU (Isaac Asselstine, Nika Saeedi, Ava Tancre, and Alexandre Yuste).

Thanks to our generous sponsors, more than 100 students had the chance to network with potential future employers and CPAs at the in-person event.

CPABC congratulates the winning teams and thanks the judges, sponsors, and everyone who participated in making the 2026 competition such a success!

**Joyce Zhu is a CPA in Ontario.*

We thank the following sponsors for their support:

- **Case partners:** Treewalk
- **Exhibiting partners:** KPMG and RHN
- **Networking partners:** Crowe MacKay, Deloitte, Doane Grant Thornton, EY, LLT, PwC, and Smythe



Members of the top eight teams are joined by Ilyas Kayran, CPABC’s student recruitment officer (front row, far left) and three of the competition’s judges: Joyce Zhu* (front row, fifth from left); June Lee, CPA, CMA (front row, fourth from right); and Diksha Singhal, CPA (front row, third from right). Photo by George Mohan.

CPAEF NEWS

Chartered Professional Accountants Education Foundation Launches “Pay It Forward” Campaign

The Chartered Professional Accountants Education Foundation of British Columbia (CPAEF) has launched an annual fundraising campaign called “Pay It Forward” to support students in need. With this new campaign, the CPAEF is inviting all CPAs to reflect on the support they received as students and consider paying it forward.

Today’s accounting students are standing where each of you once stood—working just as hard and dreaming just as big. You can help students in need cross the finish line to the CPA designation by helping to reduce financial barriers. Whether you give \$50 or \$500, your generosity can become part of someone else’s Convocation story.



Help support the next generation of CPAs by donating to the CPAEF. Visit bccpa.ca/cpaef/donate-to-cpaef for details.

“Every little bit can help someone go a long way. I was very happy to receive money myself, and I’m happy now to be able to pay it forward as a CPAEF donor.”

– Calvin Lee, CPA, CA, MBA



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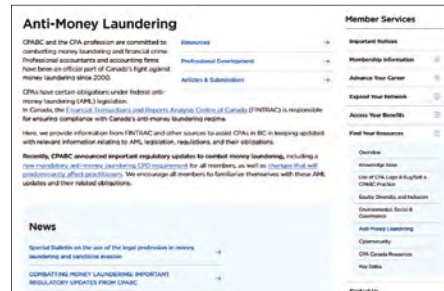
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Newsroom



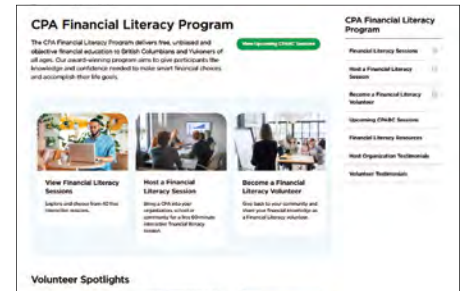
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Anti-Money Laundering



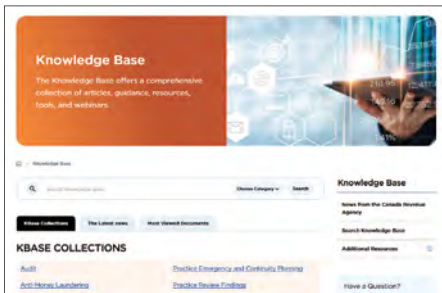
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Financial Literacy



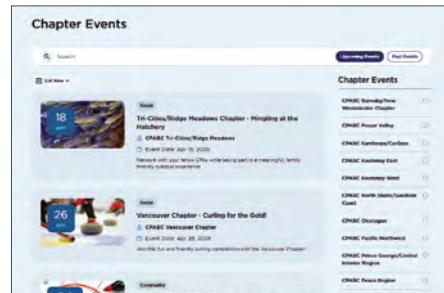
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Knowledge Base



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Chapters



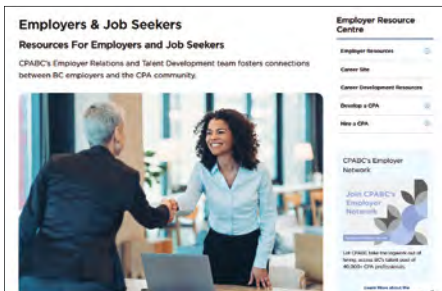
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Protecting the Public



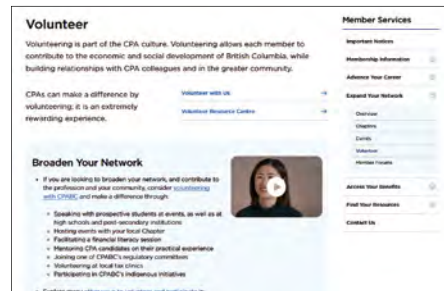
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Employer Resource Centre



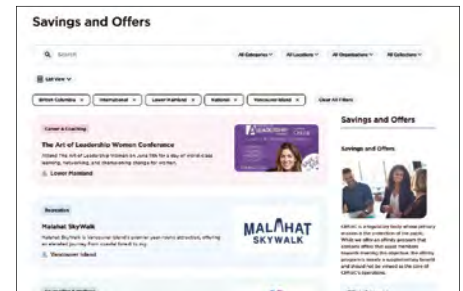
bccpa.ca/employer

Volunteer Resource Centre



bccpa.ca/volunteer

Savings and Offers



bccpa.ca/benefits



Recognizing Excellence

Meet the 15 CPAs chosen for Member Recognition in 2025. CPABC celebrates their outstanding leadership, volunteerism, and career accomplishments.

Early Achievement AWARD

The CPABC Early Achievement Award celebrates members who distinguish themselves early in their CPA careers through professional achievement and volunteer service, with an emphasis on professional accomplishments.

Henry Flowers, CPA

Henry is a senior manager in the risk services practice at PwC Canada, where he leads digital acceleration initiatives to leverage the power of AI and transform assurance and advisory processes. Equally committed to advancing diverse leadership, he serves as national chair of PwC's Black Professionals Inclusion Network, forging strategic partnerships with other Black-focused professional organizations, student groups, and not-for-profit organizations.

A CPA since 2022, Henry has helped raise awareness of the profession by taking part in a CPABC branding campaign, presenting at CPABC webinars, and serving as a CPA Ambassador.

Henry is also a leader and innovator in the community. He's held numerous board and committee chair positions with Kwantlen Polytechnic University Alumni Association (KPUAA), advising on strategic planning and representing the association at events to drive alumni engagement. Currently, he mentors Indigenous and Black youth in financial literacy and career development through the KUPAA Foundation and the CPA Canada Mentorship Program for Indigenous Students. He also volunteers as treasurer of Hogan's Alley Society, a Black-led organization advancing the well-being of Vancouver's Black population, and previously volunteered with Covenant House Vancouver to support at-risk youth.



"Henry exemplifies the values we hold dear—integrity, leadership, technical expertise, client service, and a deep commitment to fostering diversity and inclusion."

— Kartik Kannan, Partner, PwC Canada

Daniel Gardiner-McAuley, CPA

As senior vice-president of KPMG Corporate Finance (CF), Dan has advised on more than 15 M&A and capital-raising transactions for Canadian businesses across various industries, and his leadership on complex and high-profile deals has contributed to KPMG CF's continued ranking as Canada's leading mid-market investment bank.

His achievements also include developing a training program to support the growth of the CF practice from eight to 20+ people and building out KPMG's western Canadian software & technology M&A team.

Dan earned his designation in 2019. That same year, he served as class valedictorian for BC, having earned top results on the September 2018 CFE and a place on the National Honour Roll.

Active within the community, Dan serves as a board member and director of finance for Basketball BC and as treasurer of the BOLT Safety Society. Since 2019, he has funded a scholarship at his alma mater, Vancouver Island University, and several of its recipients are now pursuing the CPA designation.

For his professional achievements, Dan has received several prestigious awards, including the Association for Corporate Growth BC's Rising Star Award (2023) and the BCBusiness 30 Under 30 Award (2025).



"Dan's rare combination of technical and practical capabilities has contributed to the successful completion of numerous flagship Canadian M&A transactions. His dedication to the profession and its people is aspirational, and we couldn't be prouder of his recognition!"

— Ian Wilshaw, Advisory Managing Partner for BC, KPMG Canada

Early Achievement AWARD



Carter Hawke, CPA, CA

In recognition of his financial acumen and exceptional leadership, Carter was promoted to partner of MNP's Surrey office in 2022, just three years after re-joining the firm and seven years after earning his CPA designation.

Carter is an integral part of MNP's real estate and construction practice, which has expanded by more than 50% over the past four years. He is widely respected by clients for providing the kind of strategic guidance that enhances operational efficiency and drives sustainable growth.

A forward-thinking leader, Carter was appointed human resources partner for MNP's Lower Mainland region in 2025. As such, he is responsible for overseeing the recruitment, career development, and advancement of future CPAs and partners.

Carter is equally committed to strengthening opportunities for young people in the community. In addition to volunteering as a baseball and hockey coach, he serves on the Mentor Committee of the Cmolik Foundation, which provides opportunities for youth facing significant adversity. He is also a board member of the White Rock/Surrey chapter of KidSport, where he applies his financial and leadership expertise to expand youth access to organized sports.



"What sets Carter apart is the balance he strikes between professional excellence and community impact. He has been a catalyst for growth in our real estate and construction practice, earning the trust of clients through his insight and innovative approach."

— Darren Turchansky, CPA, CA, Executive Vice-President, British Columbia, MNP



Ivan Ma, CPA, CA

Ivan's career is defined by progressive leadership and deep expertise in mergers and acquisitions and corporate finance.

In 2025, he joined The Jim Pattison Group as senior director of corporate development, supporting the group's long-term growth through acquisitions, strategic partnerships, and enterprise-wide initiatives.

Ivan earned his designation in 2015 while articling with KPMG. Over the past decade, he has gained extensive experience in corporate finance and investment banking—most notably while serving as senior vice-president at KPMG Corporate Finance. In just 10 years, Ivan has led strategic M&A transactions with a combined value exceeding \$2 billion.

Recognized as a leader in his field, Ivan has mentored a diverse group of CPAs as they've transitioned into M&A and investment banking roles. He has also given back by helping to organize sold-out conferences for the BC Chapter of the Association of Corporate Growth. In addition, Ivan is an active member of the Yi Ping Collective, a network of more than 150 professionals committed to connecting and elevating the next generation of Asian-Canadian business leaders in British Columbia.



"Ivan embodies the idea that there are no limits to where a CPA designation can take you. He's a natural ambassador for the profession and a living example of why someone should choose this path."

— Marco Tomassetti, CPA, CA, President, KPMG Corporate Finance and Board Member, KPMG Canada

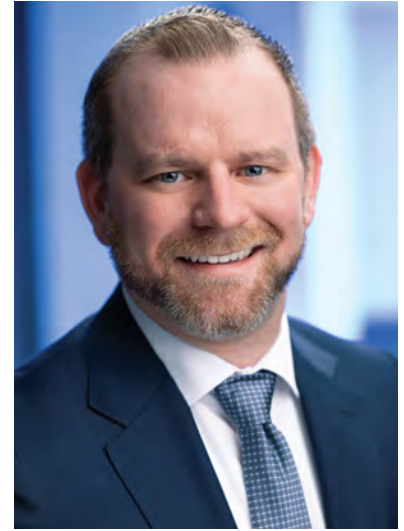
Tom Miller, CPA

Tom was promoted to the partnership of CNB in 2021, becoming one of the firm's youngest-ever partners at age 30.

He has already played a key role in CNB's growth, leading the opening of the firm's Courtenay office and helping to expand the team from 45 to 65 employees. Known for his technical expertise in providing tax advice to owners of small and medium-sized businesses, he has also developed tax-efficient planning techniques to assist First Nations clients in reorganizing and restructuring corporate businesses.

A CPA since 2018, Tom gives back by mentoring the next generation. In addition to sharing career information at post-secondary institutions, he oversees CNB's hiring of co-op students each summer. He also contributes to the profession by serving on CPABC's Public Practice Committee and Mid-Sized Firms' Forum.

Active in the community, Tom has served on the board of the Comox Valley Charity Golf Classic since 2020, helping to raise over \$500,000 for local causes. He has also given back as treasurer of the Rotary Club of Comox and led the Comox Rotary Ducky 500 to raise money for youth, environmental, and health initiatives.



"Tom is not only a gifted tax consultant but also an inspiring leader, mentor, and role model. He embodies the qualities of professionalism, compassion, and excellence that this award seeks to recognize."

— Gaby Martin, CPA, Partner, CNB



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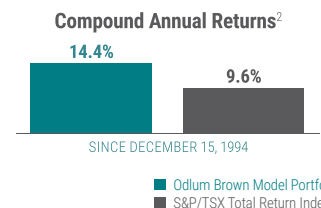
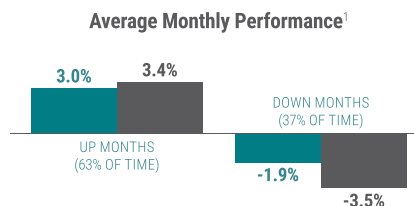
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Distinguished Service AWARD

CPABC’s Distinguished Service Award honours members who have been actively involved as volunteers for many years, recognizing them for their dedication, commitment, and outstanding contributions to the CPA profession and/or for their unstinting support to one or more not-for-profit organizations.



Selena Woo, CPA, CMA

Selena is a highly respected mentor and role model, dedicated to strengthening and diversifying the CPA profession’s talent pipeline. The vice-president of private wealth – associates at Nicola Wealth is a proud participant in CPABC’s branding campaign and an active CPA Ambassador who raises the visibility of the profession by speaking at high schools and universities and encouraging more women from diverse backgrounds to pursue careers in finance.

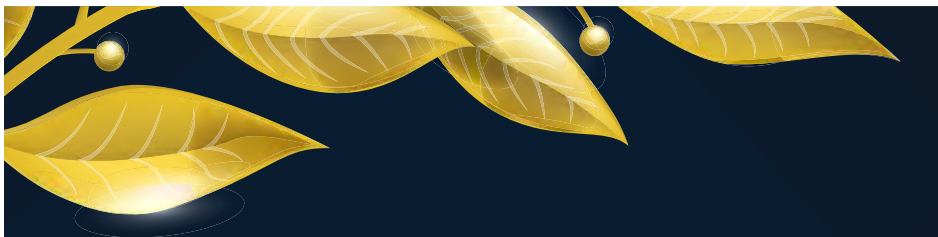
Selena’s commitment to uplifting others is reflected in more than two decades of community leadership. She has volunteered with JA British Columbia for over 20 years and has served on its board of directors since 2024. Other contributions include serving on the Activation Committee for The Forum and helping to organize its 2025 fundraising event, which raised \$1.3 million to support women entrepreneurs. She also mentors women through her involvement in VersaFi, a network for finance professionals. Selena is highly active with Dress for Success Vancouver as well, chairing its Success Luncheon and promoting financial literacy through ongoing speaking engagements.

In addition, Selena champions the Chinese Canadian community by organizing high-profile events for the Vancouver Chinatown Foundation and through her involvement on various committees, including the Chinatown Storytelling Centre Committee.

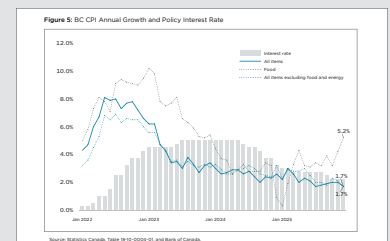


“Selena continues to distinguish herself as a thoughtful and committed leader. She paves the way for the next generation not only by giving them the tools and knowledge to succeed, but also by modelling what it means to lead with integrity, inclusivity, and care for the community.”

– Wendi Campbell, President & CEO, JA British Columbia



Erratum



In Figure 5 on page 22 of our March/April 2026 cover story, the line for “Food” inflation was incorrectly labelled as “All items excluding food and energy,” and vice versa. The online version has been updated to reflect the correct labels. All underlying data points were otherwise correct at the time of publication.

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Nominate them for a Member Recognition Award.

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FELLOWSHIP DESIGNATION

Recognizes members who have earned distinction and brought honour to the profession by meeting at least two of the following criteria: exceptional service to the profession, extraordinary career achievements, and/or exemplary contributions to the community.

DISTINGUISHED SERVICE AWARD

Celebrates members who actively share their time and skills as exceptional and dedicated volunteers making outstanding and impactful contributions either to the CPA profession or to one or more not-for-profit or charitable organizations.

EARLY ACHIEVEMENT AWARD

Celebrates members early in their CPA career who are seen as role models, bring honour to the profession and have distinguished themselves in one or more of the following: professional achievement, leadership, visibility of the profession, or community service.

LIFETIME ACHIEVEMENT AWARD

Recognizes the extraordinary leadership, dedication, and achievements of members who have received their Fellowship and continue to make significant contributions in a broad range of areas.

NOMINATION DEADLINE

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Submit your nomination today!

VISIT bccpa.ca/members/recognition-program

Fellowship

The title of Fellow formally recognizes members who have earned distinction and brought honour to the profession by meeting at least two of the following criteria: exceptional service to the profession, extraordinary career achievements, and exemplary contributions to the community.



Teresa Conway, FCPA, FCA

Teresa is a governance leader who provides strategic and financial oversight, trusted stewardship, and risk management across multiple industry sectors. Since 2018, she has served on the board of Eldorado Gold, chairing both the audit and compensation committees and helping to drive the company’s market capitalization from \$500 million to over \$10 billion while also advancing its leadership in corporate accountability.

Teresa has served on the board of Altius Minerals since 2020 and has chaired the Audit Committee since 2023. During her tenure, the company has gone through major asset transactions and the reintegration of its renewable energy subsidiary.

Among her past achievements, Teresa worked for 24 years at Powerex Corporation, where she became the first female president and CEO. As a board member for Vancity Credit Union, she provided guidance on modernizing banking platforms and integrating financial and ESG reporting, thereby helping Vancity reinforce its reputation as a values-based institution. She also served on the boards of Associated Engineering, the Western Electricity Coordinating Council, and the Canadian Electricity Association.

Over the last two decades, Teresa has supported community organizations such as the International Women’s Forum, the Order of St. John, the Minerva Foundation, the Arts Umbrella Dance Company, and the Electric Company Theatre, providing leadership that strengthens governance and community impact.



“An invaluable contributor to the economic and social fabric of British Columbia, Teresa also has a deep commitment to mentoring others.”

— David Wong, CEO, Powerex Corporation

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			West Vancouver Office 201, 585 West 16th Street West Vancouver, BC V7V 3R8 ☎ 604 925 6900 📠 604 926 7817

C.J. James, FCPA, FCA

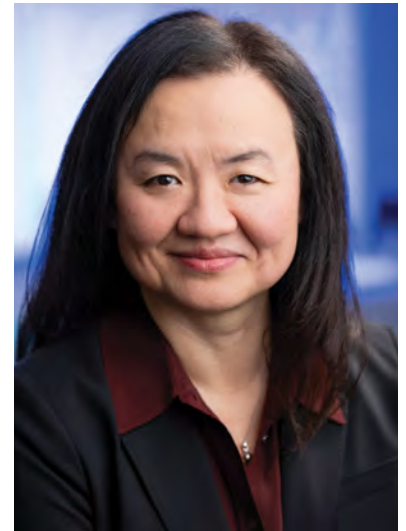
C.J. made a transformative impact on the public sector over the course of her 31-year career with KPMG.

Between 2011, when she became a partner, and her retirement in 2025, C.J. held progressively senior leadership positions at KPMG. Her tenure culminated in dual roles as the firm’s national education sector leader and as its infrastructure, government, and healthcare industry leader in BC.

C.J.’s myriad achievements at KPMG include developing and implementing strategic plans that were multi-year, cross-functional, and focused on collaboration. These plans helped successfully expand the firm’s public sector offerings beyond tax and audit to include innovative tools and value-added methodologies.

Highly respected for her technical expertise, C.J. has long been a valued audit practitioner and contributor to accounting standard-setting in Canada, helping to bridge the gap between theory and practical application. She represented KPMG on both the Office of the Auditor General of BC’s Audit Roundtable and CPABC’s Government Organizations Accounting and Auditing Forum for many years, and has served as a member of CPA Canada’s Public Sector Accounting Board since 2020.

Within the community, C.J. donates her time and resources to causes that are close to her heart, such as ensuring food security for students and investing in medical advancement. Her contributions include establishing an endowment fund for Alzheimer’s research at a university.



★ “C.J.’s knowledge and understanding of the public sector are exceptional. She consistently takes the time to understand the operations of her clients, ensuring she provides targeted, insightful support.”
— Karamjeet Heer, Associate Vice-President of Finance, Simon Fraser University

Jamal Nazari, FCPA, FCMA, FCGA

Through his dual roles as academic director of KPMG graduate programs (since 2018) and professor of accounting at Simon Fraser University (since 2013), Jamal is helping to shape the future of accounting education and professional practice. A champion of innovation, he developed a graduate certificate in accounting and data analytics and the first-of-its-kind master of science degree in accounting with cognitive analytics, which has produced more than 300 emerging leaders to date.

In partnership with KPMG Canada, Jamal launched a data analytics skills camp that has trained more than 1,000 professionals, including CPAs, to lead digital transformation initiatives. He also contributed to the creation of CPA Canada’s graduate certificate in data analytics, further embedding advanced analytics into the profession.

Sustainability reporting is another of Jamal’s areas of expertise. In addition to serving for three years on the CPA Canada Sustainability Advisory Board, advising on the integration of climate change and ESG priorities into professional practice, he was a member of the CPA Canada Corporate Reporting Awards Committee and served as a lead judge for sustainability reporting.

Jamal has published more than 36 peer-reviewed articles and serves on the editorial boards of eight academic journals. He is also a founding member of the Global Institute for Agritech, a group that is advancing analytics-driven solutions to global agricultural challenges and contributing to a more equitable future.



★ “Jamal played an important role in shaping CPA Canada’s Graduate Certificate in Data Analytics, bringing his expertise in education and technology to the national stage. His involvement has ensured that the profession remains relevant in a rapidly changing business environment.”
— Irene M. Gordon, FCPA, FCGA, Professor Emerita, SFU Beedie School of Business

Fellowship



Sheila Nelson, FCPA, FCA

Sheila has made lasting contributions to individuals and organizations across BC's interior and northern regions throughout her career. In particular, she has strengthened small businesses and communities through her deep tax knowledge and decades of public practice experience.

Before starting her own practice, SA Nelson Inc., in 2017, Sheila worked as a tax partner first at Chan Foucher LeFebvre and later at KPMG. Earlier in her career, she held senior positions in industry with Canadian Helicopters and Frontec Logistics.

Throughout her career, Sheila has maintained an exceptional commitment to the profession. After representing the northern region at the governance level for her legacy body, she was appointed to the inaugural CPABC board. She subsequently advanced through progressive leadership roles, culminating in her tenure as CPABC chair in 2022-2023. Her contributions also include serving as a member and chair of CPABC's Member Recognition, Board Renewal, Audit, and Governance committees.

Sheila also stands out in the world of sport. She holds Swimming Canada's highest officiating certification and has officiated at national championships and swimming trials for both the 2024 Olympics and Paralympics. A generous mentor, Sheila trains and evaluates swimming officials and has helped develop officiating standards through her work on the Swim BC Officials Committee.



"Sheila's career of service to her business community and the swimming community, combined with her passion for the accounting profession and her huge commitment of time over the years, make her a great candidate for Fellowship."

— Geoffrey Dodds, FCPA, Partner, Buckley Dodds



Pam Prior, FCPA, FCA

Pam is a nationally acclaimed expert in trust and estate taxation. She is the national technical partner, estates and trusts for tax and family office at KPMG Canada, supporting more than 200 professionals across Canada. Previously, she assisted countless professionals in delivering exemplary advisory services while serving as KPMG's national leader for estates and trusts and as the BC leader of charity and not-for-profit tax.

A dedicated educator, Pam has taught numerous CPABC tax courses focused on estates and trusts and charitable and not-for-profit organizations. In addition, she has delivered seminars for CPA Canada on owner-managed businesses, and co-authored a book on the income tax implications that occur at death, now in its 14th edition.

Pam has also shaped national tax policy. When the federal government introduced new trust reporting rules in 2023, she contributed to the Canadian Bar Association/CPA Canada Joint Committee submission to the Minister of Finance—a submission that resulted in meaningful legislative changes.

A long-time contributor to the Society of Trust and Estate Practitioners (Canada), Pam has delivered technical presentations, helped develop national conferences, and served on the board of the Society's Vancouver chapter. Also highly active in the community, Pam has volunteered her skills to support a wide range of organizations and currently serves as treasurer of CLEAR (Canadians for Leading Edge Alzheimer Research Foundation).



"Pam has made vast contributions to the development and advancement of her profession, as well as the advancement of associated professions that operate in the family business, private wealth, trusts, and estates environments."

— Laura West, Partner, Norton Rose Fulbright Canada

Shelley Williams, FCPA, FCA

Shelley is a nationally respected governance leader whose ability to connect financial and risk oversight and influence transformative strategy has shaped institutions across the country. As a director for the Bank of Canada, she has helped oversee the Bank's strategy during an unprecedented period of economic and geopolitical complexity. She has also provided strong oversight of systemically important projects and has led discussions to ensure the Bank's sustainability.

Previous professional achievements include guiding digital transformation at Technical Safety BC, overseeing the rebranding and business transformation of Concentra Bank, developing a strategy to maximize unitholder value for Boston Pizza Royalties Income Fund, and leading global corporate finance strategy for Finning International and Fletcher Challenge Canada during periods of rapid growth, M&A, and industry transformation. She also served on the boards of BC Life & Casualty and the BC Securities Commission.

Shelley's leadership in the community is equally extensive. In addition to being a mentor with Women Get on Board and the Institute of Corporate Directors (ICD), she volunteers as an examiner for the ICD.D program. Past contributions include chairing the Sources Foundation and helping the charitable organization quadruple its endowment and expand its capacity to deliver essential community services. Shelley also had a transformative tenure as board chair of Douglas College, during which she embedded governance best practices and positioned the institution as a sector leader.



"Shelley's contributions to the ICD, and to the broader governance community, have been nothing short of exceptional. She brings distinction not only to her own work, but to every room, discussion, and professional encounter."

— Denise De Masi, Director, Partner School Programs, Institute of Corporate Directors

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Lifetime Achievement AWARD

The Lifetime Achievement Award recognizes the exceptional dedication and commitment and the extraordinary contribution of those members who have received their Fellowship and continue to make significant achievements in a broad range of areas.



Glenn Ives, FCPA, FCA

Through his distinguished career, which spans leadership in finance, public practice, and corporate development, Glenn has generated a legacy of growth and strategic impact.

As a partner (2000-2020) and chair (2010-2018) of Deloitte Canada, he fostered client relationships that propelled the firm's growth; and as a director of the Deloitte Global Board (2010-2018), he extended his influence globally while chairing the Risk Committee and overseeing a \$600-million cybersecurity initiative.

Glenn's position as Deloitte's mining industry leader for the Americas (2004-2020) laid the groundwork for the corporate directorship roles he has held since retiring. As director and chair of the Audit Committee of Kinross Gold since 2020, he has helped double the company's market capitalization, advance a \$1.5-billion exploration project in Ontario, lead the divestment of Russian assets, and implement a shareholder-focused capital allocation strategy. At Wheaton Precious Metals, Glenn leveraged his tax expertise to drive the company's growth and double its market capitalization. While serving on the board of NervGen Pharma, which included a term as chair, he helped align scientific innovation with financial strategy to advance a promising spinal cord injury treatment.

The University of Waterloo has also benefited from Glenn's leadership, as he served on its School of Accounting and Finance Advisory Board for eight years, including six years as chair. For his contributions to student-focused programming, he received the university's Lifetime Achievement Award in 2025.

His community leadership is equally impactful. A director of St. Paul's Foundation since 2020 and chair since 2022, Glenn has helped raise over \$300 million for the new hospital. As director and chair of the Princess Margaret Cancer Foundation, he played an instrumental role in the \$1-billion "Believe It" campaign for personalized cancer medicine. Since 2014, Glenn has also strengthened BC's arts community through his service on the board of directors of Bard on the Beach, which includes his current role as president.



"Glenn's dedication is evident in every organization in which he has served. Through a varied career—from CFO and public firm audit partner to national chair and global board member, or as a director for public company and not-for-profit organizations—his efforts have always led to significant accomplishments."

— Calvin H. Buss, FCPA, FCA, Retired Partner, Deloitte

"Glenn exemplifies the highest standards of leadership, integrity, and professional excellence that this award seeks to honour. His decades-long commitment to advancing the accounting profession, mentoring future leaders, and philanthropic contributions have left an enduring legacy in BC and beyond."

— Randy Smallwood, CEO, Wheaton Precious Metals

Elio Luongo, FCPA, FCA

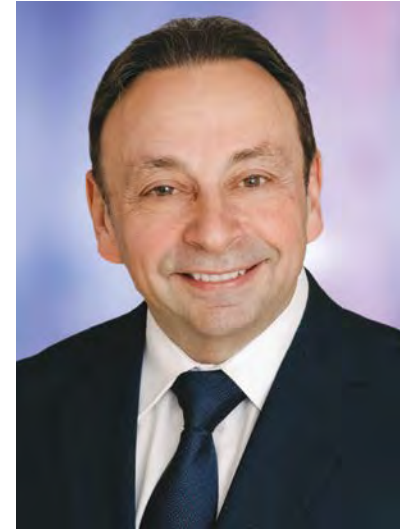
Elio is a visionary leader whose career has significantly shaped the accounting profession, business education, and Canada's broader corporate landscape.

As CEO and senior partner of KPMG from 2016 until his retirement in 2024, he championed innovation, diversity, and technological transformation while leading more than 1,000 partners and 11,000 employees across 40 Canadian offices. He also served as one of 18 global board members for KPMG International.

Among his accomplishments, Elio oversaw 35 acquisitions to develop new business areas, expanded KPMG's partnership by more than 50%, and doubled revenue. He also advanced the firm's capabilities in AI, machine learning, robotics, and data analytics, and strengthened its digital infrastructure through Lighthouse, the firm's data science and software development arm. In addition, he helped create KPMG's Digital University at SFU, enabling CPAs and others to gain skills and credentials in digital analytics; this program was subsequently adopted nationally by CPA Canada.

A strong advocate for equity and inclusion, Elio introduced partner diversity KPIs and increased the representation of women and people of colour in leadership roles. He also pioneered mental health leadership by appointing a chief mental health officer in 2017.

Elio's influence extends well beyond KPMG. As a current director for TD Bank and Tolko Industries, he offers expertise in global markets, geopolitical risk, and operational excellence. His volunteer leadership includes chairing the Canadian Centre for Audit Quality since 2022, past service on the board of governors for the Canadian Tax Foundation, and contributions to CPA Canada's Tax Advisory Committee. In the community, Elio has helped advanced health-care innovation at Unity Health Toronto, championed gender equity as a member of the board of Catalyst Canada, and strengthened financial oversight and governance at the Conference Board of Canada. His contributions have been recognized with an honorary doctor of laws from SFU and multiple awards for business excellence and community impact.



"Elio has a deep sense of honesty, integrity, and humility, and these attributes are his superpowers. They help him build trusted relationships with clients, colleagues, and peers, motivate and encourage the people around him, and lead every initiative he takes on with great passion and compassion."

— William B. Thomas, FCPA, Global Chair and CEO, KPMG International

"I believe Elio has made positive and lasting impacts on everything he's touched: KPMG in Canada and the businesses and clients he advised, including mine; the community organizations he serves; and his family. For me, Elio is the gold standard that others should emulate and he is a true inspiration as a leader."

— Ryan Beedie, President, Beedie



Lifetime Achievement AWARD



Barry Macdonald, FCPA, FCA

Barry is widely recognized and highly regarded for his community service, strategic leadership, and professional expertise.

During his 34-year career with PwC Canada, Barry held national leadership roles in transfer pricing and inbound client services, served as the human resources leader for the tax group, and was a partner in Hong Kong (1990-1997).

A sought-after director skilled at guiding complex multi-stakeholder development projects, Barry has provided leadership to the SFU UniverCity Real Estate Trust since 2005. Under his oversight, including as executive chair, the Trust has built a thriving mixed-use community of 8,000 residents and generated more than \$200 million to support SFU students and faculty. In 2018, he received the Chancellor's Distinguished Service Award for this and other contributions, including his service as chair of the Beedie School of Business External Advisory Board and as a member of SFU's Board of Governors.

That same year, Barry joined the board of Truvera Trust & Mortgage. He became its chair in 2019, stepped in as interim CEO in 2020, and subsequently guided Truvera to a 400% increase in revenues while bringing in new shareholders. Since 2018, he has also been active with FrontFundr, an online private markets investment platform, leading fintech innovation as a board member and chair. He previously served as chair of EasyPark Vancouver.

Barry's more than 20 years of contributions to the accounting profession are equally notable and include senior roles in governance. These culminated in his tenure as CPABC chair in 2018-2019, during which he played a pivotal role on the National Collaboration Accord Review Task Force.

Also a tireless volunteer in the broader community, Barry is committed to the arts, youth development, philanthropy, and international business. He currently serves on the board of directors of the Vancouver International Film Festival and is vice-chair of Canuck Place Children's Hospice. Previously, he provided leadership to the Arts Umbrella Foundation and the Hong Kong-Canada Business Association.



"Barry's commitment to our community is extensive and broad and combines a significant commitment of his time as well as financial resources. It's hard to find anyone with a more impressive background and history of giving back, particularly to the communities where he grew up, attended university, and obtained his FCPA—as well as key sectors in the Lower Mainland such as the arts and health."

— John DeLucchi, FCPA, FCA, President and CEO, Madison Venture Corporation

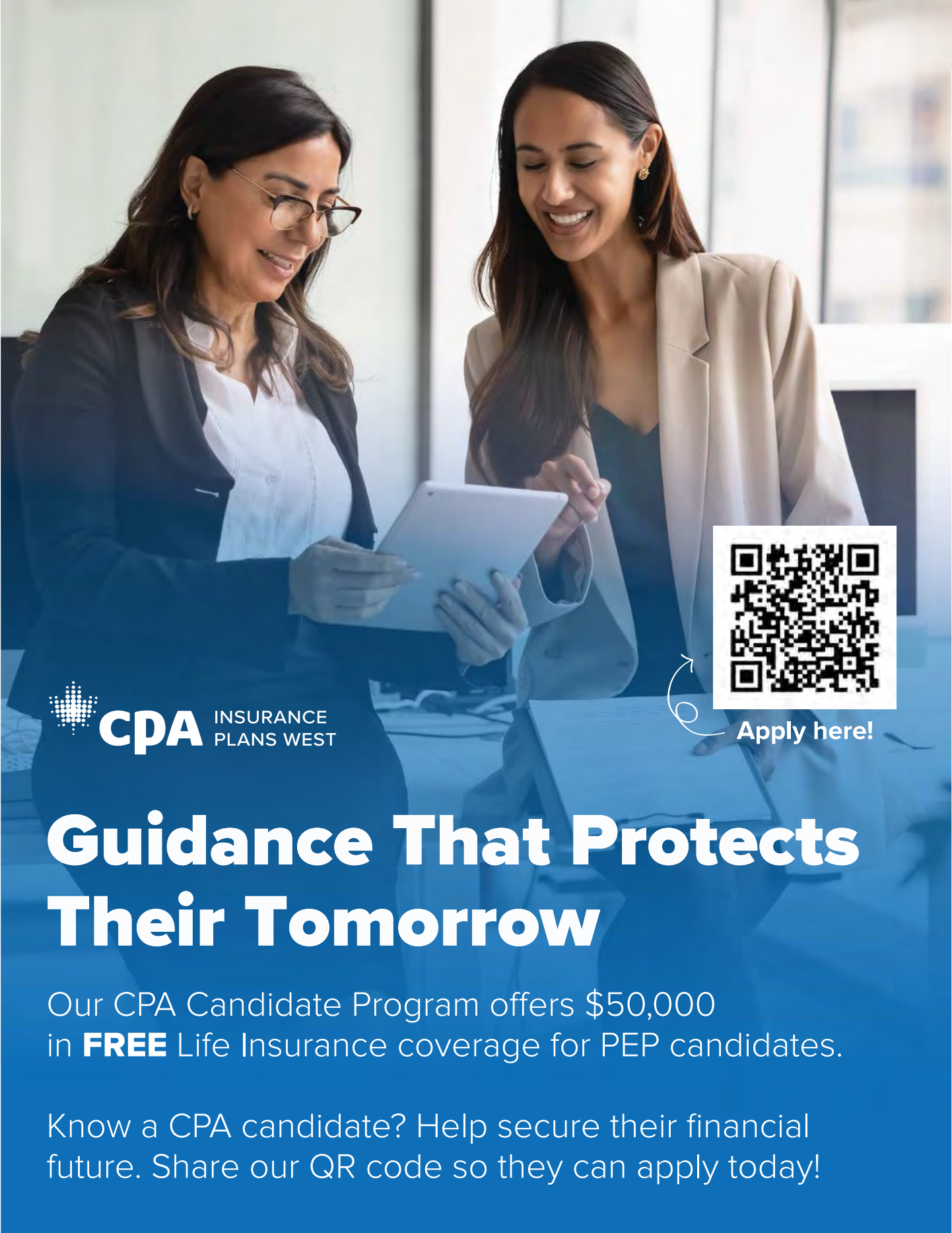
"Barry's impact goes far beyond boardrooms and balance sheets. He is a tireless mentor, always willing to lend his time and insights to young professionals and business persons. Those of us who know him best also know that Barry possesses a terrific sense of humour—never at anyone's expense, always rooted in his self-awareness and humility. It is this combination of brilliance, humility, loyalty, and warmth that makes Barry not just respected, but deeply beloved."

— Ben Goldberg, Principal, The Lanyard Group of Companies



Photos of Glenn Ives and Elio Luongo by Bobo Zhao Photography;
all other photos by Kent Kallberg Studios.



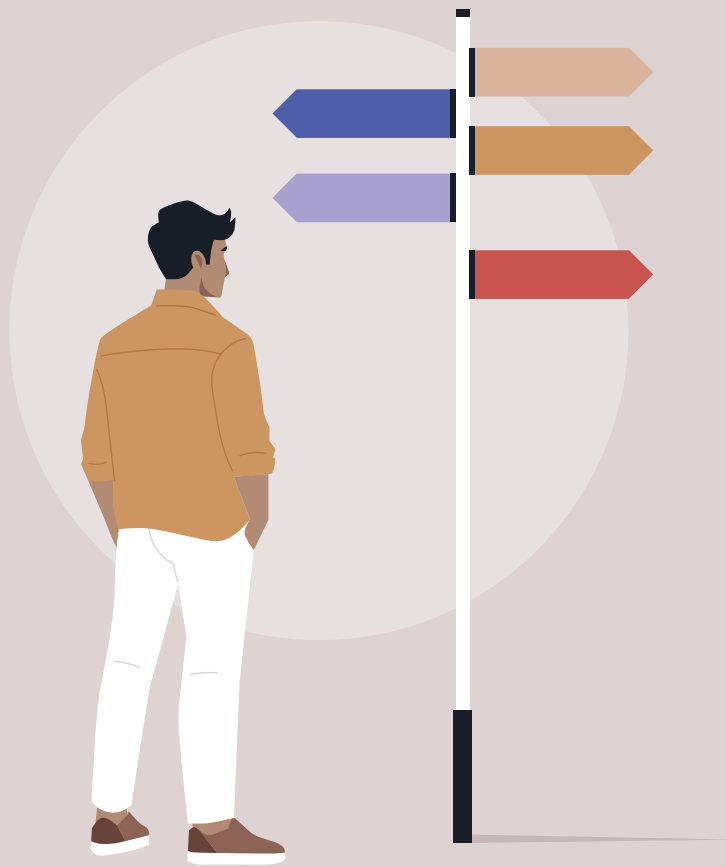


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Supporting the Long Game: An Update on CPABC’s Indigenous Engagement Strategy

By Lori Mathison, FCPA, LLB

At CPABC, we are committed to making the accounting profession more attractive and accessible to Indigenous individuals. In support of this goal, and in keeping with the United Nations Declaration on the Rights of Indigenous Peoples and the recommendations of the Truth and Reconciliation Commission, we continue to work respectfully with Indigenous partners and communities.

Here’s a look at some collaborative activities over the past year:

Activities with and for our members

Indigenous Members Forum

CPABC’s Indigenous Members Forum provides Indigenous members with a virtual meeting space that’s occasionally open to non-Indigenous CPA allies as well. Some meetings focus on connection building, some on learning, and others on providing input to CPABC.

The forum provided us with tremendous input over the past year, particularly as we set about drafting CPABC’s Indigenous People’s Acknowledgment, which was added to the CPABC website in October 2025. Members of the forum also offered feedback on what impact means as we—as CPAs—look to measure outcomes. They concurred that our goal to increase the number of Indigenous students becoming CPAs is a long-term one, and that in that regard, we are “playing the long game.” In the meantime, we are continuing to make connections with Indigenous youth and communities.

CORE PRINCIPLES

The following principles guide CPABC’s Indigenous Engagement Strategy:

- Our work is inclusive of First Nations, Métis, and Inuit peoples;
- We focus on building respectful and trusting relationships;
- We seek Indigenous participation and inclusion in developing plans;
- We prioritize collaboration and partnerships; and
- We endeavour to learn, unlearn, and relearn.

New free PD course

British Columbia has far fewer treaties and significantly more diverse Indigenous populations than elsewhere in Canada, and most Canadian professional development courses are simply too general to do justice to this complex reality.

Recognizing this, the Chartered Professional Accountants Education Foundation of British Columbia provided funding to develop a new PD course for BC CPAs that specifically focuses on the uniqueness of the Indigenous landscape here in BC.

We would like to acknowledge and thank the Indigenous authors who developed the course content and generously shared their knowledge and perspectives. We also recognize the Indigenous CPABC members who served on the Advisory Committee and provided valuable input throughout the course's development.

The course will be offered for free this fall. Stay tuned!

Initiatives with our partners

CPABC and the First Nations Financial Management Board (FMB) have worked together on a variety of initiatives over the years to attract more Indigenous youth to the profession and to support the role of CPAs in advancing economic reconciliation.

This past year, the FMB undertook the First Nations Financial Statement and Audit Research Project to identify the issues affecting a growing trend of missing and delayed First Nations annual financial statements. CPABC and other provincial/territorial CPA bodies supported this work by reviewing and providing input to the survey questions and by identifying and reaching out to CPAs who work with First Nations to seek their participation in the research.

Building on the work done over the past year, the FMB will lead the next phase of the project to advance targeted solutions. This includes identifying policy and system-level barriers and developing proposals to reduce reporting burdens for First Nations. One proposal that has already been developed and created is the Indigenous Technical Advisory Group, a national association of finance and accounting professionals dedicated to supporting First Nations in Canada with the adoption and implementation of new accounting, financial reporting, and sustainability standards.

In addition, the FMB will continue to engage with national and regional partners to advocate for enhanced training, recruitment, and retention of accounting professionals serving First Nations.

"We'll provide ongoing updates to our partners as this work progresses," says FMB CEO Scott Munro, FCPA. "This important project demonstrates the value of collaboration involving the CPA bodies and the FMB—part of our shared journey toward economic reconciliation."

CPABC'S INDIGENOUS PEOPLE'S ACKNOWLEDGMENT

"As the provincial regulator of the CPA profession, we wish to acknowledge and thank the local Indigenous peoples for their stewardship and care of the lands across British Columbia.

"We respectfully recognize the diversity of First Nations, Métis, and Inuit peoples living in British Columbia, and honour their heritage, stories, cultures, and contributions—past, present, and future. We reaffirm our commitment to fostering respectful relationships and advancing the steps we have taken toward reconciliation.

"CPABC thanks the Indigenous Member Forum for their insights into developing this acknowledgement."

Engagements with Indigenous youth and communities

From our research and our discussions with Indigenous members, we understand that there's an ongoing need for financial literacy for Indigenous peoples. Accordingly, over the past year, we've offered more than 50 financial literacy presentations to Indigenous audiences.

CPABC currently has four financial literacy sessions tailored specifically for Indigenous audiences and a total of 14 sessions of interest to them. We were honoured to present two of these sessions—"Money Basics for Indigenous Youth (Plus a Fun Game of Bingo!)" and "Budgeting for Independence"—at this year's Gathering Our Voices event in March. It was a pleasure to be invited to participate in this Indigenous-focused youth conference once again, and we are grateful to Indigenous CPA members Vickie Whitehead, CPA, and Sheryle Evans, CPA, CIA, B.Sc., for serving as our facilitators. Combined, their sessions reached a total of 250 Indigenous young people.

This past year, CPABC also partnered with the BC Association of Aboriginal Friendship Centres to deliver two customized sessions—"Introduction to Financial Stewardship" and "Understanding Financial Statements"—to the association's staff.

CPABC also participated in post-secondary and employer events, Indigenous career fairs, and community gatherings such as conferences and pow-wows—activities that enabled us to connect directly with Indigenous youth and students, their family members, and community members and leaders. This outreach gave us many opportunities to communicate the value of pursuing financial education and careers in business and finance.

NUMBERS AS OF DECEMBER 2025

- 329 members—just over 0.8% of CPABC's total membership—have self-identified as Indigenous (by comparison, the percentage among BC residents is 5.9%); 288 of these members live in BC.
- 69 BC students in the CPA Professional Education Program have self-identified as Indigenous; they represent 1.3% of BC's total student population registered in CPAWSB.

We would like to acknowledge the significant contributions of Danielle Levine, who led CPABC's Indigenous Engagement Strategy for seven years before her recent retirement. Danielle's leadership and insights have been key to this initiative's progress. We thank Danielle for her efforts and wish her all the best in the future.



Looking back over the past year's events, Jesse Bruised Head, CPABC's Indigenous engagement program manager, says: "The most rewarding conversations for me have often happened at the community events we have been invited to attend. I've had an opportunity to speak with both youth and community members, and I've had several prospective and current students share that they hadn't considered—or even heard of—the CPA designation, and were now re-evaluating their educational and career goals.

"In one instance," he adds, "a grandmother told me she was intrigued by the career prospects for a CPA professional, and impressed with our Financial Literacy Program, as she wanted her grandchildren to be able to access the knowledge and career opportunities that many older generations did not have."

New horizons, new faces

Danielle Levine (pictured top left) led our Indigenous Engagement Strategy for seven years before retiring in January 2026. Under her leadership, CPABC was able to build trust and forge the kind of relationships that have shaped our progress thus far.

As we bid farewell to Danielle, we also look forward to introducing her successor in a future issue of *CPABC in Focus*. Stay tuned! ■

Lori Mathison is the president and CEO of CPABC.



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For up-to-date information on CPABC's Indigenous events and initiatives, visit bccpa.ca/about-cpabc/cpabc-indigenous-engagement.

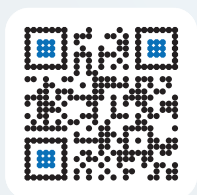
And if you'd like to volunteer in support of CPABC's Indigenous Engagement Strategy, we would be very pleased to hear from you. You can contact us at indigenous@bccpa.ca for more details.



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Recognizing and Addressing Workplace Burnout

Although the rates and costs of workplace burnout vary by industry and workforce composition, burnout appears to be on the rise. Research also shows the very real benefits of preventive measures for employees and employers alike.

Mental Health Research Canada conducted an online survey of 5,008 employed adults across Canada in 2025.¹ Here are some highlights from the survey report:

↑ 39% of respondents said they often or always feel burned out, **up from 35% in 2023**.

That number jumps to **42%** for women and racialized Canadians and to **58%** for those who describe their workplaces as stressful.

Percentage of employees who experience burnout:

- in workplaces that prioritize prevention **27%**
- in workplaces that *do not* prioritize prevention **47%**

55% of respondents find their workplace stressful (**11%** say “very stressful”).



81% of managers say they prioritize preventing burnout **but only**

36% of employees said their employer offers programs and policies to prevent burnout (often or always);

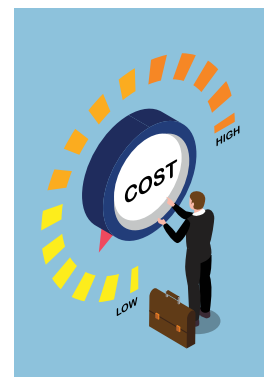
49% feel their employer promotes work/life balance (often or always); and

44% think their company offers support for managing stress.

An employer-led shift from inaction to prevention could save **\$3,400 per employee per year** or

\$1.7 million annually

for a 500-person firm.



¹ Mental Health Research Canada (MHRC), *Mental Health in the Workplace 2025*, June 2025. To read the full report, visit mhrc.ca/workplace-mh-2025. MHRC is a non-governmental, registered national charity committed to mental health research and helping to improve the lives of Canadians.

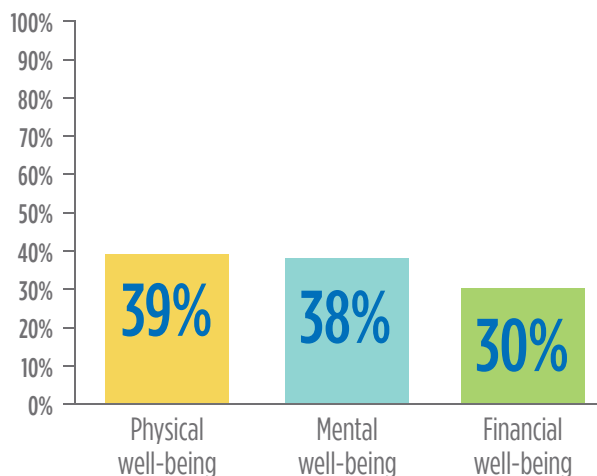
Stats from the *Telus Mental Health Index* also convey the importance of prevention:²

Only 45%

of survey respondents said their employer offers an employee assistance program (EAP).

Their mental health score was **four points higher** than those without an EAP and **two points higher** than the national average.

% of respondents who rated employer supports as “very good or excellent”



The upside

Employees who rated levels of support as very good or excellent had higher mental health scores than the national average.

Room for improvement

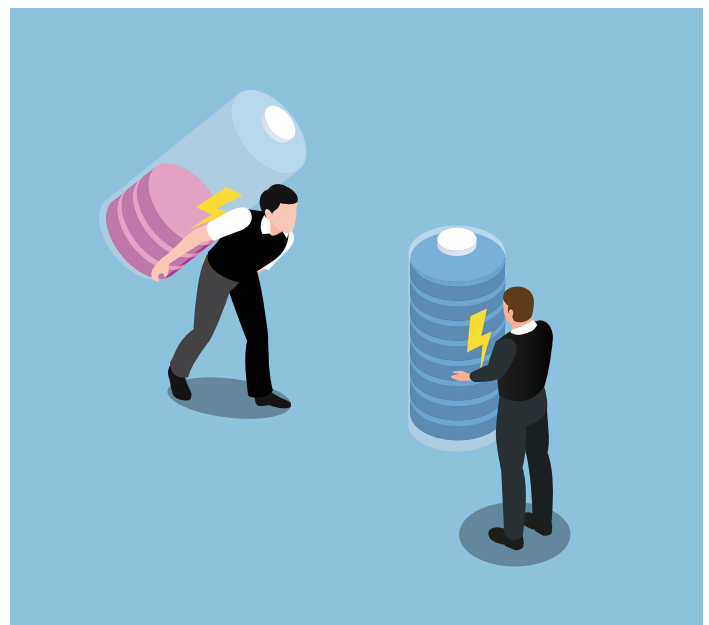
Non-managers and women were **50% to 60%** more likely to rate employer support across all three categories as **poor**.

² Telus Health, *TELUS Mental Health Index*, September 2025. To read the full report, visit telushealth.com/telus-mental-health-index. The *TELUS Mental Health Index* is produced quarterly in Canada.

³ Dr. Kennette Thigpen, “Top Risk Factors HR Leaders Should Know in 2026,” telushealth.com, January 8, 2026.

Recommendations for employers:³

- **Be proactive:** It costs more to address a crisis than to prevent one.
- **Provide options:** Offer a variety of resources that can be personalized and accessed 24/7 by a diverse workforce.
- **Integrate offerings:** Consolidate physical, mental, and financial health resources into one EAP to make it easier for employees to find what they need.
- **Raise awareness:** Telus Health data shows that active EAP users are much better able to improve their well-being and productivity. Make sure to highlight your EAP resources!
- **Measure what matters:** Focus on employee satisfaction, retention, absenteeism, and productivity levels—not on app downloads.
- **Give leaders the right tools:** Train managers to spot the early warning signs, provide preventive tools, and have supportive conversations.



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Checking In on Mental Wellness in the Profession

By Kerri Brkich



Jacob Lund/Stock/Getty Images

In October and November 2025, CPABC's Mental Wellness Steering Committee conducted its third mental wellness survey of CPA members and candidates, building on earlier surveys from 2021 and 2022. As in previous years, the results of the CPABC survey were compared against the Mental Health Index (MHI),¹ a national survey conducted quarterly by Telus Health, the provider of CPABC's member assistance program. In addition to providing national results, the MHI provides BC-level insights, allowing for meaningful comparison.

While this year's results show some signs of improvement, they also signal a clear call to action for employers—specifically, to support the mental wellness of staff and stave off issues like burnout by maintaining adequate staffing, especially during busy seasons, and by giving candidates enrolled in the CPA certification program adequate time to complete their studies.

What follows is an overview of the key trends that emerged from this year's survey.

Against the benchmark

Compared to CPABC's two previous mental wellness surveys, which were conducted in the immediate aftermath of the pandemic, the results of the 2025 survey show moderate improvement when measured against the MHI. Reduced levels of anxiety, depression, and social isolation appear to be driving this upward shift.

Notably, CPA respondents' scores (65.2) are now more aligned with both national (64.0) and provincial (63.7) averages, suggesting that CPAs' mental wellness has moved back in line with the general workforce. Previously, CPAs' mental wellness scores were two to three points lower than those of BC and Canadian workers overall.

However, progress remains slow. When asked “compared to this time last year, would you say your mental wellness is better, worse, or about the same,” an equal number of CPAs reported improved mental health (29% said better) as those who reported declines (28% said worse). Stigma also emerged as a growing concern—particularly apprehension that disclosing a mental health issue could negatively affect career opportunities.

Overall, the findings suggest that mental wellness continues to improve, but at a gradual pace.

Work-related stressors

Across the profession, work continued to be the predominant source of stress. CPAs who reported working more overtime at any point during the year were more likely to rank themselves lower in terms of mental wellness and higher in terms of exhaustion and feeling overwhelmed. CPAs also had a lower work productivity index at 56.2 compared to workers in BC (63.3) and Canada (63.4).

Three times as many CPAs identified work, rather than personal life, as the primary cause of stress; this contrasts sharply with the general workforce in BC and Canada, where personal life typically plays a more substantial role.

More than 50% of CPAs said they felt exhausted at the end of each workday, a figure that has increased since 2022. While workload pressures remain a central factor, CPAs also reported higher-than-average concerns related to work-life balance, insufficient resources or support, a lack of recognition or feedback, unclear expectations, and poor communication.

Employers, especially firms, should be mindful of the factors that contribute to burnout (see pages 32-33 for more). Recognizing that teams shouldn't be expected to operate short-handed, particularly during busy season, employers need to plan proactively to ensure that they have adequate staffing, provide appropriate support, and keep workloads manageable and sustainable. And, given the demands of the CPA program, they should make sure candidates have access to the flex time needed for studying.

Members and candidates should prioritize self-care (nutrition, exercise, and sleep) to maintain balance. Without this foundation, burnout can quickly become a compounding cycle that's harder to break (see pages 40-41).

¹ Telus Health, *TELUS Mental Health Index*, June 2025, telushealth.com.

Personal stressors

Though less dominant than work-related concerns, personal stressors continue to affect CPA respondents. Lack of time was the most commonly cited personal stressor—likely linked to demanding work commitments, but indicative of broader pressures as well. Many CPAs also reported higher levels of personal expectations compared to other BC and Canadian workers, highlighting the unique performance pressures faced by members of the CPA profession.

Mental wellness benefits

Most working CPAs reported having access to at least some form of employer-provided mental wellness support. Common offerings include prescription drug coverage, flexible work arrangements, life insurance, and coverage for therapy. Less common but still valued benefits include gym subsidies, on-site fitness programs, and employee resource groups.

Perceived value across these supports was exceptionally high, even for benefits used by relatively few employees, such as disability coverage or peer support groups. Among those who used these supports, the vast majority found them helpful, reinforcing for employers the importance of maintaining a diverse suite of mental wellness resources.

The use of CPABC's own mental wellness offerings remained low. However, CPAs who were familiar with these resources viewed them positively and felt that CPABC provides an appropriate range of supports.

Sector-specific highlights

Differences emerged among several subgroups, illustrating how career stage, life stage, and workplace environment intersect with mental wellness outcomes.

- **Organization size:** CPAs working in large organizations (500+ employees) were more likely to report worsening mental health over the past year.
- **Stigma:** While stigma generally decreased with age, both senior and non-senior leaders expressed more concern than executives that a mental health issue could limit their career advancement.
- **Workload and vacation:** Individuals who work the most hours, particularly during peak periods, and those who take less vacation days were more likely to report concerns about career prospects and experience negative self-perceptions related to mental wellness.
- **Public practice and candidates:** CPAs in public practice, candidates, and those consistently working longer hours showed poorer mental wellness indicators overall.

Given the broad value placed on mental wellness supports, it is fundamental to the profession's well-being overall that candidates and CPAs across all career and life stages have access to diverse resources.

Looking ahead

CPABC will continue to promote its mental wellness programs and work to normalize conversations about mental health within the profession. However, reducing stigma requires collective action. Employers of CPAs across all sectors play a critical role in fostering environments where mental health concerns do not carry perceived career risks or other negative ramifications.

Sustained progress depends on ongoing dialogue. We encourage all members of the profession to engage in and support these important conversations. ■

Kerri Brkich is the vice-president of external affairs and communications for CPABC and the chair of CPABC's Mental Wellness Steering Committee.

About the survey and the respondents

- The survey was conducted by Leger on behalf of CPABC in October and November 2025.
- 2,001 CPAs and candidates participated.
- 67% of respondents were in the Mainland/Southwest region of the province, 17% were in the Vancouver Island/Coast region, and the remaining 16% were in other regions of BC.
- 53% of respondents worked in industry and 21% worked in public practice.
- The most common role respondents held within their organizations was "Accountant/Senior Accountant/Analyst" followed by "Manager/Senior Manager."
- 43% worked at a small organization (1-99 employees), 19% at a mid-sized organization (100-499 employees), and 30% at a large organization (500+ employees).
- The vast majority of respondents were employed, with 84% working full time.

Breakdown of survey respondents by number of years in the profession (as of 2025):

- CPA for 16+ years: 41%
- CPA for 6 to 15 years: 26%
- CPA for 5 years or less: 16%
- CPA candidate: 17%



Farzin Remtulla is a partner and wealth advisor with ZLC in Vancouver, where he specializes in providing tailored financial strategies to maximize wealth.

Navigating the Complexity of Life Insurance Beneficiary Designations

By Farzin Remtulla, CPA, CA



sommar/istock/Getty Images

Estate planning is a multifaceted area that includes taxation, legal considerations, family dynamics, liquidity planning, and more. And with larger amounts of wealth transferring from one generation to the next, we are living in a time where the need for a proper estate plan—much like the complexity of creating one—is greater than ever.

Increasingly, business owners are using life insurance as a strategy when creating an estate's liquidity plan. Life insurance has proven to be a cost-effective and tax-efficient asset that provides estates with instantaneous liquidity to meet financial obligations while also producing a generous after-tax financial return. As with any professional strategy, however, life insurance does not offer a one-size-fits-all solution. Many factors need to be considered, including how much life insurance is needed, where it should be held, which solution will work best, how much it will cost, and who the beneficiaries will be.

This article focuses on the beneficiaries.

So, who are they?

It's a simple enough question to answer: A beneficiary is an individual or entity that is entitled to the proceeds of life insurance. What's not so simple, however, is the process of designating one.

The golden rule is to start by considering the need behind the life insurance. Is it meant to protect family and loved ones? Is it meant to buy out the interests of a business partner? Is it meant to provide an estate with the liquidity it needs to meet its financial obligations?

Let's look at some of the key factors as they relate to different kinds of beneficiaries.

Minors


A common concern for young families is what will happen if both parents perish in a common disaster or if one parent predeceases the other while the children are still young.


While minors can be named directly as beneficiaries or contingent beneficiaries on an insurance application, this is generally not the most effective way to protect their financial well-being. Although an insurance application allows for the naming of a trustee, it provides only limited set terms for that trustee to follow. Moreover, it provides no instructions on how the insurance proceeds are to be invested, when and how much can be accessed for the maintenance of the children, or when the insurance proceeds will be paid out to the children. Without any such instructions, the insurance proceeds will be paid out when the children reach the age of majority, which is usually not the desired result.

For this reason, it is important to know that in lieu of naming a minor beneficiary directly through an application with an insurance carrier, a legal insurance declaration can be made through a will or another written document. This kind of declaration can direct the proceeds to be settled into children's trusts, which are otherwise created in a will, and the proceeds will then be bound by the same terms as if they had formed part of the parents' respective estates—while recognizing that the insurance proceeds do not form a part of these estates.

Probate

Life insurance proceeds can avoid probate where there is a named individual beneficiary, in which case the proceeds will bypass the will and get paid directly to that individual. However, in situations where an *estate* is listed as the beneficiary, the insurance proceeds will become part of the estate's assets, subjecting them to the probate process and associated fees.





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Creditors

Proceeds from an insurance policy can be placed out of the reach of a policyholder's creditors when a spouse, child, or grandchild is named as the beneficiary. This is not the case if the proceeds flow through an estate or into a corporation, in which case creditor risk should be considered.

Note, however, that even when proceeds are paid directly to family members, consideration should be given to any of the *beneficiary's* potential creditors, as creditor protection does not extend to them.

Resulting trust

From an estate standpoint, the presumption of resulting trust arises when the recipient of property is presumed to be holding the property in trust for estate beneficiaries, rather than receiving it as an outright gift.

Before 2020, it was commonly thought that such presumption would not apply to beneficiary designations. That view changed with the case of *Calmusky v Calmusky*, in which the court ruled that the presumption of resulting trust applied when an individual received the proceeds of his father's registered retirement income fund through a beneficiary designation. This decision shifted the onus onto the son to prove that he'd received the funds as a true gift. Ultimately, he couldn't prove this, so the funds were returned to the father's estate and distributed in accordance with his will.

Unsurprisingly, this decision sent shockwaves through the estate-planning community. And the drama didn't end there: The *Calmusky* decision was subsequently overridden by the ruling in the case of *Mak (Estate) v Mak* (2021), and then applied again in *Simard v Simard Estate* (2021), before being overridden once again in *Fitzgerald Estate v Fitzgerald* (2021).

While the consensus today is that the presumption of resulting trust should not apply to beneficiary designations, these court cases generated lingering uncertainty. As best practice—especially when there is an unequal distribution of proceeds to beneficiaries—professionals should make clear notes regarding the expressed intentions of their clients, and, in some cases, they should recommend that the individual making the beneficiary designation seek independent legal advice and a capacity certificate through a lawyer.

Per stirpes

In the event that a life insurance beneficiary predeceases an insured person, absent any direction, the deceased beneficiary's share of the life insurance benefit will be split equally among the surviving beneficiaries. Often this does not coincide with the insured person's desired result, which is for the deceased beneficiary's share to pass to their own descendants or "per stirpes" (Latin for "by roots").

It is, therefore, very important that beneficiary designations be properly documented, which in many cases requires drafting a comprehensive written beneficiary designation to be filed with the insurance company.

Shareholder agreements

Often, a corporation's shareholders' agreement will require life insurance for key shareholders. This is to provide the company with the liquidity needed to repurchase a departing shareholder's shares in the event of their death.

Most commonly, the corporation will own the insurance policy and will be the designated beneficiary of the insurance proceeds. Where many shareholders' agreements fall short is in not addressing what will happen next with the insurance proceeds or how the accompanying addition to the company's capital dividend account will be allocated.

The agreements that best address life insurance proceeds generally:

- a. Give the corporation leeway to use the insurance proceeds in a manner that provides flexibility from a tax perspective (i.e., the proceeds can either be used to redeem the shares of the departing shareholder or be paid out to the remaining shareholders to allow them to purchase the departing shareholder's shares); and
- b. Properly address how the addition to the capital dividend account is to be allocated.

Corporate ownership

Situations may arise in which it is desirable for one company to own an insurance policy while naming a second company as the policy's beneficiary. However, this is not best practice from a tax standpoint, as was illustrated in the case of *Gestion Roy v the King* (2022, 2024).¹

As the *Gestion Roy* case demonstrates, this type of structuring opens up the possibility of the CRA assessing a taxable benefit under one of many sections of Canada's *Income Tax Act*, including sections 15(1), 246(1), 9, and 12(1)(x). To avoid this, it is generally best if the corporation that owns an insurance policy is also the payor of the premiums and the beneficiary of the policy. Similarly, an individual shareholder should not be named as the beneficiary of a corporate-owned life insurance policy.

An important piece of the puzzle

As advisors, CPAs can play a crucial role in helping clients navigate the tax and other intricacies of estate planning, including estate liquidity options and life insurance beneficiary designations, and assist them in working with a trained insurance advisor. ■

¹ This case went before the Tax Court of Canada in 2022 and the Federal Court of Appeal (FCA) in 2024. The FCA upheld the Tax Court's decision.



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PD EXPERTS

How to Reclaim Your Day

By Scott Orth, M.Sc., CPCC



Scott Orth is a mindfulness and resiliency coach and trainer who helps leaders and busy professionals learn how to reduce stress, respond to challenges more mindfully, and create the lives they want. He was previously the national HR leader for one of Canada's largest employee-owned engineering and science consulting organizations. Photo by Barry Duncan.

Scott Orth discusses mindfulness, resilience, and more in his blog and free biweekly newsletter. Visit mindfulwisdom.ca for details. This article draws from two blog posts.

In my work with CPAs and other busy professionals, the same themes keep showing up: persistent distractedness, stress, and a sense of being overwhelmed. Maybe I'm romanticizing the past, but it seems that somewhere along the way we stopped creating space in the day for ease, connection, and meaning—and I don't believe it has to be this way.

Start with intention

The modern world is built to distract, disrupt, and overwhelm us. Recognizing this is the first step to reclaiming your day. As the best-selling author of *Essentialism*, Greg McKeown, put it: "If you don't prioritize your life, someone else will."¹

How do you typically start each day? Be honest with yourself—do you check your phone the moment you wake up? Reading email and doomscrolling aren't the healthiest ways to start your morning.

Instead, give yourself a few minutes of silence to ground yourself in the present. Do a few minutes of calm, focused breath work, read something inspirational, and/or do some movement that centres you. Then set your intention for how you want to move through the rest of the day.

Check in with yourself during the day

It's impossible to create a sense of flow throughout the day if you're constantly in a state of disruption, high intensity, and stress. Flow comes when your mind is calm and focused on what matters, which is why it's so important to build some breathing room into your day, where you can. Make an effort to say no to endless back-to-back meetings. Schedule "focus blocks" to work on what's essential—not just what's urgent or distracting in the moment.

Giving yourself moments of calm throughout the day will also help you challenge negative thinking. To ensure our survival, the human brain has evolved to have a negativity bias, which makes us more likely to identify threats than opportunities. It also has an amazing ability to function like a time machine, imagining possible futures and reliving past events. While this kind of time travel allows us to learn from the past, plan for the future, and weigh decisions, it can also lead to endless rumination and worry.

When we're working at high intensity for hours on end, rumination, worry, and negative thinking can cloud our world view and affect how we interact with those around us. By taking time to check in with yourself throughout the day, you can bring yourself back to the present and challenge and reframe negative thoughts. Again, one of the quickest ways to do this is by pausing and breathing. Then try to practise gratitude and notice what's working.

¹ Greg McKeown, "If You Don't Prioritize Your Life, Someone Else Will," *Harvard Business Review* (hbr.org), June 28, 2012.



JulPo/E+/Getty Images

Stop the bottomless feed

When it comes to being present, one of the biggest challenges we face is the bottomless supply of news and social media designed to capture and hold our attention.

These feeds are there to fill every conceivable gap in the day: while we wait in line, during meeting breaks, and even while walking down the hall (or across intersections). This endless stream of information fragments our focus, interrupts our thoughts, and offers a tempting escape from the slightest challenge or briefest moment of boredom.

One of the easiest ways to break the hold of technology and avoid the lure of quick dopamine hits is by turning off non-essential notifications. Another option is to delete the apps that pull you in but leave you drained. And try practising JOMO—*the joy of missing out*—on activities that aren't truly fulfilling (like scrolling), in pursuit of gaining more peace and mental clarity in your day.

Prioritize what makes you human

As humans, we thrive when we're connected, moving, and mentally renewed, which is why it's so important to step away from our screens. Take time each day to genuinely connect with someone. Schedule a few minutes for a walk or to stretch between calls. Be deliberate about unplugging for a bit, and let your nervous system breathe and reset so you can recharge.

Taking time out to manage your busy brain, take care of yourself, or create boundaries in your day isn't a frivolous luxury. It's a sign of a life well-lived, aligned with what matters most. So, start where you are. Choose one practice from this article that calls to you and reclaim your day. ■

PD WITH THE AUTHOR

Scott will be teaching the plenary session “Balancing AI, Trust, and the Human Connection: The Future Role of the CPA” on May 21, as part of CPABC’s in-person PD Nexus: AI Insights conference in Vancouver. You can also catch three of his past sessions online and on demand:

- Fostering “Deep Work” in a Distracted World;
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Special feature: You can attend the full two-day event or individual days.

In-Person Seminars this Summer

Intensify your learning by attending face-to-face sessions where collaboration comes naturally and conversations lead to real breakthroughs. Here are some titles in July and August:

ChatGPT x Excel: The Ultimate Toolkit for 21st Century Accountants

July 14

ChatGPT and Generative Artificial Intelligence for Accountants

July 15

Income Tax – Everyday Issues for General Practitioners

July 15

Leadership and Coaching

July 22

MEMBERS IN FOCUS

ANNOUNCEMENTS AND ACCOLADES

Kudos!



A new role...

Jennifer Jones, CPA, CA, was recently promoted to serve as director of CPABC's Professional Development (PD) Program. Jennifer's 14 years with CPABC include 10 years within the PD department, where she started as a manager. Prior to her latest appointment, Jennifer served for three years as PD's associate director.



... and a fond farewell!

Nicola McLaren, CPA, CA, CPABC's vice-president, professional development and learning, will be retiring on June 30, 2026. Her 40-year career as a CPA has included various roles in public practice, industry, and, for the past 10 years, at CPABC, where she currently leads both the PD and member advisory services departments. In advance of her departure, CPABC would like to acknowledge and thank Nicola for her many years of valuable work in support of the organization and, in particular, her tireless contributions to the PD Program at both the provincial and national levels. Best wishes on your next adventure, Nicola!



Have some news to share?

If you have an announcement you'd like to share, we'd love to hear from you! Email us at infocusmag@bccpa.ca.

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3



CPAS IN THE COMMUNITY

CPABC Chapters Give Back Across the Province

Supporting local food banks

As part of its annual “Spreadsheets to Super” initiative, the Burnaby/New Westminster Chapter hosted events to support the Greater Vancouver Food Bank on January 10 and 24. During each event, volunteers helped distribute food to the local community while connecting with colleagues.

On February 28, the Kamloops/Cariboo Chapter hosted an event to support the Kamloops Food Bank. Its volunteers, many of whom were first-time chapter participants, processed over 1,700 pounds of food, assembled 125 hampers, and sorted 844 pounds of produce. Beyond this impressive output, the event helped participants build meaningful connections and reinforced the chapter’s commitment to supporting the local community.



Raising awareness and funds for the Coldest Night of the Year

On February 28, members of the Pacific Northwest, Surrey/Langley/North Delta, and Vancouver chapters participated in the Coldest Night of the Year event—an annual walk raising awareness and funds for individuals and families experiencing homelessness and hardship.

The Pacific Northwest Chapter walked in support of the 'Ksan Society, a long-standing grassroots organization serving the Terrace community. The Surrey/Langley/North Delta Chapter came together in support of the Cloverdale Storehouse Society, raising awareness of local homelessness issues and community needs. The Vancouver Chapter walked in support of the CityReach Care Society, which provides essential food security programs and community services across Greater Vancouver.

In each location, participants walked in solidarity to provide tangible support to those in need. Afterward, everyone gathered for a warm meal to connect and reflect on the impact of community involvement.

1. Vancouver Chapter members participate in the Coldest Night of the Year (CNOY) event to support CityReach Care Society. 2. Members of the Burnaby/New Westminster Chapter volunteer with the Greater Vancouver Food Bank. 3 & 4. Members of the Kamloops/Cariboo Chapter volunteer with the Kamloops Food Bank. 5. Members of the Pacific Northwest Chapter gather for a photo after walking in support of the 'Ksan Society at their local CNOY event.



MEMBERS IN FOCUS

MEMBER RECOGNITION

Two Gala Events Celebrate CPABC's Membership



CPABC's 2025 honourees. Back row (l to r): Carter Hawke, CPA, CA (Early Achievement); Henry Flowers, CPA (Early Achievement); Jamal Nazari, FCPA, FCMA, FCGA; Daniel Gardiner-McAuley, CPA (Early Achievement); Ivan Ma, CPA, CA (Early Achievement); and Glenn Ives, FCPA, FCA (Lifetime Achievement). Middle row (l to r): Elio Luongo, FCPA, FCA (Lifetime Achievement); Shelley Williams, FCPA, FCA; Selena Woo, CPA, CMA (Distinguished Service); Sheila Nelson, FCPA, FCA; and Pam Prior, FCPA, FCA. Front row (l to r): C.J. James, FCPA, FCA; Tom Miller, CPA (Early Achievement); Teresa Conway, FCPA, FCA; and Barry Macdonald, FCPA, FCA (Lifetime Achievement). Photo by Kent Kallberg Studios.

FCPA Dinner

Approximately 100 FCPAs gathered at the Vancouver Club on February 24 to honour the six members elected to Fellowship in 2025, along with the three FCPAs chosen for the Lifetime Achievement Award. CPABC's FCPA Dinner is an annual event that celebrates the positive impact of the FCPA community on the profession, the business sector, and the broader public while giving FCPAs a welcome opportunity to reconnect with their peers.

Member Recognition Dinner

A vibrant turnout of 165 members and guests attended CPABC's Member Recognition Dinner at the Fairmont Waterfront Hotel on April 1 to celebrate the 15 members recognized for outstanding achievement in 2025 (see pages 14-26). Joining in the celebration were family members, colleagues, and friends of the honourees, as well as representatives from CPABC's Board of Directors, Executive Management Committee, and two member recognition committees. Congratulations to our 2025 honourees!



1. C.J. James, FCPA, FCA (centre), receives her Fellowship certificate from CPABC Board Chair Alain LeFebvre, FCPA, and CPABC President & CEO Lori Mathison, FCPA, LL.B. 2. Early Achievement Award winner Carter Hawke, CPA, CA (second from right), celebrates with colleagues. 3. Alain LeFebvre and Lori Mathison present Barry Macdonald, FCPA, FCA, with his Lifetime Achievement Award. 4. Early Achievement Award winner Daniel Gardiner-McAuley, CPA (left), with Lifetime Achievement Award winner Elio Luongo, FCPA, FCA. 5. Distinguished Service Award winner Selena Woo, CPA, CMA, with her family. 6. Pam Prior, FCPA, FCA, with husband Robert Prior. 7. Henry Flowers, CPA, receives his Early Achievement Award. 8. Early Achievement Award winner Ivan Ma, CPA, CA, takes the stage. 9. Early Achievement Award winner Tom Miller, CPA, with wife Kristy Miller. 10. Sheila Nelson, FCPA, FCA, with her family. 11. Jamal Nazari, FCPA, FCMA, FCGA, receives his Fellowship certificate. 12. Lifetime Achievement Award winner Glenn Ives, FCPA, FCA (right), with Christopher Gaze, founder and artistic director of Bard on the Beach.



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Inquire at poegroupadvisors.com/practice/bc2036.



CPABC's Job Search Resources

We offer a number of resources to help CPAs find work and help employers find CPAs:

- Career development events at bccpa.ca/events.
- A careers site at careers.bccpa.ca.
- An employer network—email careers@bccpa.ca to sign up and receive a 25% discount on all Careers Site job postings.



SNAPSHOT:

Lisa Abbate,
CPA, CA

The job: CFO of Vancouver Whitecaps FC.

Why she loves it: “Sports was something I found my way into, and it turned out to be my dream job. It’s fast-paced, dynamic, and full of passionate people. I get to be part of something bigger than finance: impact, culture, and community.”

What drives her: “As a first-generation Canadian, I know I wouldn’t have had this opportunity without the sacrifices made by my parents and my grandmother. Their journeys paved the way for mine, and I carry that appreciation with me in everything I do.”

Opening up the playing field: “Growing up, I didn’t see many women in leadership roles who looked like me, and that shaped how I lead today. My goal is to model what’s possible and create space for others to thrive without limitations. If I can help one person feel seen or confident enough to take that next step, then I feel like I’ve done something meaningful.”

Best bit of advice: “Don’t let doubt—yours or anyone else’s—hold you back. Advocate for yourself. Speak up, even if it’s uncomfortable. You belong in every room you walk into, even if you’re the only one who looks like you.”

Learn more about Lisa at bccpa.ca/newsroom.



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