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MAY/JUNE 2025

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and award winners



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Shamus Molloy, CPA
Manager, MNP



Bobo Zhao Photography



CPABC **IN**FOCUS

May/June 2025, Vol. 13, No. 3

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

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About

CPABC in Focus is published in British Columbia six times a year and is sent to approximately 30,000 CPA members, candidates, and students. Opinions expressed are not necessarily endorsed by CPABC. Copyright *CPABC in Focus* 2025. Visit us online at bccpa.ca.

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

Publications mail agreement no. PM 40069584



The Immeasurable Rewards of Getting Involved

With spring in full bloom and the sun shining, my year as board chair is coming to an end. I want to express my deep gratitude to my fellow board members and CPABC's senior leadership and staff for their insight, dedication, and teamwork. Collaborating with each of you has been an honour and a pleasure, and it's with complete confidence in all of you that I will be passing the baton at CPABC's virtual AGM on June 20.

Much of our collective effort during my tenure has focused on highlighting the attractiveness of the profession and the opportunities available to CPAs. Going forward, the board, executive, staff, and CPA volunteers will continue to recruit and support talented individuals to ensure a consistent influx of new CPAs—this means engaging high school and post-secondary students, newcomers to Canada, career changers, and Indigenous peoples (see pages 32-33).

A key success factor is communicating the value of the CPA designation. We can all do this by highlighting the diverse career paths available to CPAs and by showcasing the exceptional achievements, expertise, and positive impact of our members. Speaking of which, you'll find profiles of our latest Member Recognition Program honourees in our cover story on pages 16-31. These outstanding CPAs are excellent ambassadors for the profession, and I had the honour of congratulating each of them in person at CPABC's recent FCPA and Member Recognition celebrations (pages 50-51).

Looking back over my years on the CPABC board, I'm struck by the valuable learnings, collegial conversations, and collaborative efforts that have enhanced my life and career. It's why I encourage others to get involved. Whether you participate in chapter initiatives, networking events, forums, committee service, or recruitment activities, I can guarantee that connecting with your CPA colleagues and your community will enable you to grow both personally and professionally.

Thank you for allowing me to serve. I look forward to seeing many of you in offices and coffee shops, and on trails and rivers, throughout BC and beyond. ■



Peter Guo, CPA, CA
CPABC Chair

Adapting Amid Ongoing Uncertainty

Tariffs and political turmoil continue to cloud the outlook for the provincial economy as I write this in early April. To uphold CPABC's core mandate of protecting the public and to support our members, candidates, and students through this period of significant uncertainty, we will continue to keep you informed on important matters affecting the profession, leverage diverse delivery models for our PD courses, modernize our education program with the new CPA Professional Program, and share our objective thought leadership on the economy, particularly through our *BC Check-Up* publications.

We're also adapting to address changes in the regulatory environment. This means providing additional resources to ensure that we demonstrate leadership in connection with anti-money laundering measures and putting more supports in place to address the increasing complexity of regulatory proceedings, such as those related to professional conduct.

Another of our priorities is strengthening CPABC's security posture. With the increasing reliance on technology—particularly artificial intelligence (AI)—cybersecurity remains a top priority. At the same time, we recognize that AI provides opportunities for improvement, so we're continuing to explore and implement AI tools to enhance services and streamline operations. For example, successful deployment of a planned AI chatbot will likely pave the way for the use of similar technology across other platforms—including the automation of workflows, which will allow staff to pivot to more value-added tasks.

Also on the horizon is the tenth anniversary of the *Chartered Professional Accountants Act* on June 24. After this date, members will no longer be required to tag the CPA designation with their legacy designation (see page 10), marking a significant milestone. This issue's infographic on pages 34-35 highlights some of the other notable achievements for the profession over the past decade.

Lastly, I'd like to take a moment to thank Peter for his excellent leadership as board chair. His contributions have been greatly valued and appreciated, especially given the significant changes the profession and our province have experienced over the past year. ■



Lori Mathison, FCPA, FCGA, LLB
CPABC President & CEO

NOTES & NEWS

AGM ANNOUNCEMENTS



Save the Dates: AGMs for CPABC and CPA Yukon

British Columbia: June 20, 2025

CPABC will hold its 2024-2025 annual general meeting (AGM) virtually on Friday, June 20, 2025. Details and meeting materials will be posted to bccpa.ca in late May.

Yukon: June 17, 2025

CPA Yukon will hold its 2024-2025 AGM in person in Whitehorse on Tuesday, June 17, 2025. Details and meeting materials will be posted to bccpa.ca/yukon in late May.

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UPDATE TO PUBLIC SERVICES

Enhanced and Expanded Online Directories

To provide better access to information and protect the public, we have enhanced CPABC's online directories to integrate member, registered firm, and public notice information, and we have expanded the CPA Yukon directories.

The online CPABC and CPA Yukon member directories provide a listing of members and their city/town of practice or employment, as well as their category of licensure if they are licensed in public practice. The online CPABC and CPA Yukon firm directories provide a listing of firms registered to provide public practice services, along with the names of the practitioners licensed to provide these services.

Additionally, the public practice services that each member and registered firm is authorized to provide, if any, are indicated in these online directories, as are any related public notices. *Note:* Some members and firms may be excluded from the online directories for safety or privacy reasons, with Registrar approval.

Visit bccpa.ca and bccpa.ca/cpa-yukon for details.



MEMBER RECOGNITION

Nominate a Shining Star for a CPABC Member Recognition Award

Do 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 2025 program must be received by CPABC by 4:00 p.m. on Monday, September 15, 2025. To learn more about the different awards and the nomination process, visit bccpa.ca/member-services/recognition-program.



Bottom: Elnur/iStock/Getty Images; top: ersinkisack/iStock/Getty Images.

Five Outstanding Leaders Recognized at 2025 IWIB Awards



The 2025 Influential Women in Business Award honourees (l to r): Ingrid Jarrett, Kristine Simpson, FCPA, FCA, Natali Altshuler, and Gopi Chande, FCPA, FCA (not present: Kristy James). Photo courtesy of *Business in Vancouver*.

CPABC was a proud sponsor of the 2025 Influential Women in Business (IWIB) Awards luncheon, which took place on March 7, 2025, to coincide with International Women's Day. Presented by *Business in Vancouver*, the annual IWIB Awards celebrate outstanding female senior executives and entrepreneurs in British Columbia.

Nominate a CPA for an IWIB Award

Nominations for the 2026 Influential Women in Business Awards are now open.

Visit biv.com/iwib for details.

During the awards luncheon, held at the Fairmont Waterfront Hotel in Vancouver, the following individuals were recognized for leadership in their respective fields and their contributions to British Columbia's broader business community:

- **Natali Altshuler** – COO, EA Sports Studios;
- **Gopi Chande, FCPA, FCA** – CFO, Telus Digital;
- **Kristy James** – President and CEO, Burnaby Hospital Foundation;
- **Ingrid Jarrett** – President and CEO, BC Hotel Association; and
- **Kristine Simpson, FCPA, FCA** – Partner, assurance services, BDO Canada.

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

REGULATORY REMINDERS

IMPORTANT:

2025/2026 Member Dues Are Now Past Due DEADLINE WAS APRIL 1, 2025

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

If you have not yet paid your 2025/2026 member dues, please do so before May 31, 2025, to avoid the administration 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 2025 indicating that the payment deadline for 2025/2026 member dues was April 1, 2025. 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 member dues notice online, visit services.bccpa.ca. You can print the notice for your records and pay your dues electronically.



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Keep Your Contact Information Current



miniseries/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 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.

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.cpaweb.ca. Contact CPAWSB at cpaapplication@cpaweb.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 via email.

MEMBER RESOURCES

The Value of Using a CPA: New Tool to Help You Provide Clarity

CPABC's member advisory services team fields between 2,000 and 2,500 inquiries a year from both members and the public on a wide variety of topics.

Some of the inquiries we receive from the public indicate a general sense of confusion about the differences between CPAs and non-CPAs. For example, we're often asked to explain:

- CPABC's regulation of CPA members;
- How CPAs help their clients;
- Who can call themselves a CPA; and
- What services a CPA can provide.

To help you educate the public on these issues and emphasize the value of hiring a CPA, we've prepared a one-page information circular you can provide to prospective or existing clients, as well as to other services providers. It also links to the CPABC website, where readers can find more information if interested.

You can download the information circular using the QR code (right) or from our website at bccpa.ca/should-you-use-a-cpa. And if you have questions, comments, or feedback on the circular, please contact the member advisory services team at professionaladvisory@bccpa.ca.



Should you use a CPA?

Who are CPAs?
Chartered Professional Accountants (CPAs) are trained to have the technical and professional skills necessary to provide professional accounting services and other valuable insights and advice to multinational corporations, small businesses, non-profits, government agencies, and individuals. They are respected for their leadership in public accounting, strategic thinking in corporate settings, and guidance in government accounting.

Why work with CPAs?
CPAs are essential for navigating complex regulatory requirements and helping clients with financial and legal matters. Only CPAs can call themselves CPAs under the CPA legislation and due care, objectivity, and ethical behavior. While anyone can call themselves a CPA, only CPAs are also required to work under the CPA Act. What services do CPAs provide? CPAs who provide known services include audit, review, and compilation. Only CPAs can provide audit, review, and compilation engagement services, which provide different levels of assurance to users of financial information. As such, their usage is often determined by law or regulation, or by an entity's board or management.

Restricted to CPAs

Assurance level	High	Medium	None
Audit	Yes	No	No
Review	No	Yes	No
Compilation	No	No	Yes

More information
Scan the QR code or click on the link to learn more about the benefits of working with a CPA.



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NOTES & NEWS

REGULATORY NEWS

Designation Usage

When the *Chartered Professional Accountants Act* was enacted on June 24, 2015, it required all members in British Columbia to preface their legacy designations with the CPA designation. With the 10-year anniversary of this milestone approaching, members will soon have the option of using the CPA designation on its own.

Effective June 24, 2025:

- All legacy CA, CGA, and CMA members may choose to use and display the CPA designation on its own or continue to use it with and followed by their legacy designation(s); and
- Members will be able to update their designation display preferences in CPABC's member directory by visiting CPABC's Online Services site at services.bccpa.ca and updating the "Profile Information" section of the Profile page.

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FEE NOTICE

Cost-Recovery – Credit Card Convenience Fee

As part of CPABC's ongoing commitment to transparency and effective financial management, we have introduced a new policy regarding credit card payments. Effective April 1, 2025, a 1.8% convenience fee is being applied to all credit card transactions. This change helps us recover the costs of processing fees levied by credit card companies, which can range from 1.61% to 2.24% per transaction. We may review and update the rate based on changes implemented by the credit card companies.

To provide flexibility, we offer several no-cost payment methods, including Visa Debit card and Mastercard Debit card, online banking (i.e., bill payment), cheque, wire transfer, and EFT.

We understand that this change may affect you, and we thank you for your patience and co-operation with this transition. Your support is crucial in helping us maintain the quality services you expect from CPABC.

More information is provided in the Member & Practice Regulation section of our website at bccpa.ca.



OTHER NEWS

CPA Insurance Plans West Turns 50

CPA Insurance Plans West (CPAIPW) is celebrating its 50th anniversary in 2025.

Founded in 1975 as a non-profit corporation serving chartered accountants, CPAIPW has been providing insurance services and group employee benefits programs to all CPAs since the unification of the CA, CGA, and CMA legacy bodies in 2015.

CPAIPW is governed by the four western provincial bodies (CPA British Columbia, CPA Alberta, CPA Manitoba, and CPA Saskatchewan) and reports to a board of directors comprised of two CPA representatives from each body.

This year, to commemorate its anniversary, CPAIPW is launching the CPA Candidate Program, which will provide students enrolled in PEP (candidates) with \$50,000 in free term life insurance during their studies. The program will also provide scholarships or bursaries in each of the four western provinces to support candidates and their families as candidates work towards the CPA designation.

CPAIPW will soon announce contests, promotions, and events on its website and social media channels. For more details, see the ad on the facing page.





Celebrating 50 Years at CPA Insurance Plans West

It's a golden year for CPA Insurance Plans West.

Since 1975, we've protected the health and wealth of CPAs across Western Canada through exclusive insurance offerings and Group Employee Benefit programs.

To mark our 50th Anniversary, we're celebrating you—the person behind the designation—with contests, promotions and more! Visit our website at **cpaipw.ca** for all the details!



CPAEF NEWS

Aspiring Accountant Award Recognizes Promising High School Students

The CPA Education Foundation (CPAEF) launched an exciting new initiative for high school students in 2025. Members of the Teacher Colleague program, which is run by CPABC's student recruitment team, were invited to nominate Grade 11 or 12 accounting students for a new "Aspiring Accountant Award," which recognizes both academic achievement and leadership. With the award comes a \$250 scholarship.

The CPAEF received a total of 59 worthy nominations from 52 high schools across the province. In addition to showing an aptitude and interest in accounting, many of the nominees also contribute to their schools and communities as volunteers.

As a result of this successful call for nominations, the CPAEF was able to award \$14,750 directly to high school students in BC. It was a particularly exciting result for the CPAEF board, which is happy to support young people as they prepare for their post-secondary studies.

RESOURCES FOR EMPLOYERS AND JOB SEEKERS

CPABC Connect Event: Getting Future Ready

As the workplace continues to evolve due to technological advancements and shifts in staffing, it is increasingly important for both professionals and employers to proactively prepare for the future of work.

On February 27, 2025, CPAs and aspiring CPAs, as well as employment partners, attended CPABC's Future Ready: Business Insights and CPA Connections event at the Hyatt Regency Vancouver to discuss what it means to be "future ready." The evening's highlight was an engaging and insightful panel discussion featuring industry leaders who shared key considerations on how to navigate tomorrow's challenges and best position yourself for the future.

The following are some of the topics that continued to spark conversation during the networking session that closed out the event:

- Leveraging AI along with professional expertise to create a competitive advantage for businesses and individuals alike;
- The concept that "your network is your net worth," which emphasizes the value of human relationships; and
- The importance of upskilling your communication and other "human" skills to differentiate yourself in an increasingly technological world.

We thank everyone who participated in this engaging and enlightening event. If you'd like to learn about future CPABC Connect Panel discussions, contact our Employer Relations and Talent Development team at careers@bccpa.ca.

Special thanks to the following:

- **Moderator:**
Chad Chang, CPA, CMA – co-founder, Purpose CPA
- **Panellists:**
 - **Amanda Collinge, CPA, CGA** – AVP operations innovation & insights, tax preparations, client reporting & rapid response team, Raymond James Ltd.;
 - **Heather Sim, CPA** – president, Treewalk; and
 - **Kyle Bunnell, CPA, CA**
- **Participating employers:**
 - Advinor
 - BCSPCA
 - Cash Management Group | Canaccord Genuity
 - EY
 - Purpose CPA
 - QuadReal
 - Rise CPA
 - Smythe
 - Treewalk
 - Walsh King
 - WELL Health



CASE COMPETITION

2025 CPABC Business Case Competition: Fostering Accounting Skills and Strategic Thinking



Left: Members of the top eight teams are joined by the competition's four judges: Whitney Okeke, CPA, CMA, MBA (back row, seventh from right); Alykhan Bandali, CPA, MBA (back row, fifth from right); Felicia Truong, CPA (front row, fourth from right); and David Yang, CPA, CMA (far right). Right: Team JEDI Consulting celebrate their first-place win. Photos by Bobo Zhao Photography.

Each year, CPABC's Business Case Competition challenges post-secondary students in British Columbia to apply their financial savvy and critical thinking skills to business case analyses.

Between January 31 and February 2, 2025, a record-breaking 62 post-secondary teams, each consisting of three or four students from various academic years, participated in the first round, which was held virtually. Teams had 48 hours to review the business case of an e-commerce seller and demonstrate their knowledge of managerial accounting concepts, including analyses, projections, and planning.

After the first round, eight teams from four post-secondary institutions—Langara College, Simon Fraser University, Thompson Rivers University, and the University of British Columbia—advanced to the second (final) round, which was held in person at CPABC's offices on March 22. Presented with a business case involving the international expansion of a Canadian business, teams had three hours to analyze growth opportunities, international market selection, franchising dynamics, and the circular economy to develop the best strategy moving forward.

Each team then made its recommendations to a judging panel of CPABC member volunteers: Alykhan Bandali, CPA, MBA; Whitney Okeke, CPA, CMA, MBA; Felicia Truong, CPA; and David Yang, CPA, CMA. The judges assessed competitors on their presentation style, case knowledge, strategic implementation, creativity, and handling of rapid-fire questions.

Participants later gathered at the Shangri-La Vancouver Hotel for an evening reception, where prizes were awarded to the top three teams:

- **First place:** "Team JEDI Consulting" from UBC, represented by Emily Han, Jay Han, Isabel Houang, and David Ramos.
- **Second place:** "Team WKND Consulting" from UBC, represented by Deniz Emre, Kennedy Kopke, Wesley Lin, and Kade Manning.
- **Third place:** "Team Echelon Consulting" from SFU, represented by Albel Dhanoa, Kai Lee, Melissa Taghdiry, and Naia Wong.

Thanks to our generous sponsors, this year's reception was expanded to welcome most of the teams from the first round of the competition, which meant that more than 100 students had the chance to network with potential future employers and CPAs.

CPABC congratulates the winning teams and thanks the judges, the sponsors, and everyone who participated for making this year's competition—the twelfth in the event's history—such a success!

We thank the following for their support:

- **Exhibiting partners:** KPMG, MNP, and Treewalk
- **Networking partners:** Deloitte, Doane Grant Thornton, EY, LLT, and PwC

SAVE THE DATE

CPABC Infinite Conference

Mark your calendars for the CPABC Infinite Conference! This hybrid event on **November 27 and 28** will feature exciting speakers and courses, as well as a variety of networking opportunities.

In-person offerings will be held at the Vancouver Convention Centre, and members who aren't able to attend in person will be able to participate virtually.

To get the latest updates on the conference, be sure to subscribe to *e-News*, Engagement Activities, and Professional Development news. Not sure if you've already subscribed? Log in to services.bccpa.ca to confirm or update your communication preferences.

You can also visit the conference webpage at pd.bccpa.ca/conferences-series/infinite.


infinite
Limitless Opportunities,
Endless Growth



VOLUNTEER OPPORTUNITIES

Share Your CPA Pride at CPABC's Recruitment Events!



PeopleImages/Stock/Getty Images

Interested in sharing your CPA story with prospective students? If so, CPABC's student recruitment team invites you to consider joining our volunteer roster. We're always looking for passionate CPA members and candidates to help us promote the profession and showcase the diverse career opportunities available to future CPAs.

Here are two ways you can get involved:

Become a CPA Ambassador

Volunteer opportunities for member and candidate ambassadors include attending CPABC networking events and career fairs; speaking about your CPA career path at virtual and in-person events for high school, college, and university students, working professionals, and newcomers; and being a panellist or keynote speaker at CPABC gala dinners.

Visit bccpa.ca/ambassador to learn more and sign up.

Inspire high school students to consider the CPA profession

CPABC's student recruitment team visits high schools throughout the school year to give presentations about the CPA profession, and we're always looking for enthusiastic volunteers to join us.

We're also looking for guest speakers to join us at our presentations to high school students involved in programs run by Junior Achievement British Columbia (JABC) and Young Entrepreneur Leadership Launchpad (YELL). For most of these presentations, we're seeking members and candidates who are either entrepreneurs or have experience working with or for entrepreneurs. However, you don't have to be an entrepreneur to get involved, as some of these guest speaker opportunities are open to all members and candidates interested in sharing their insights.

For more information about volunteering as a guest speaker, email the student recruitment team at highschool@bccpa.ca.

Follow CPABC on Social Media



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Access Resources on the CPABC Website

Newsroom



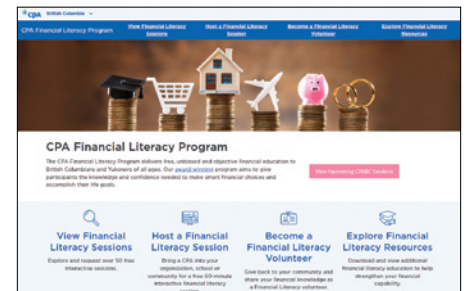
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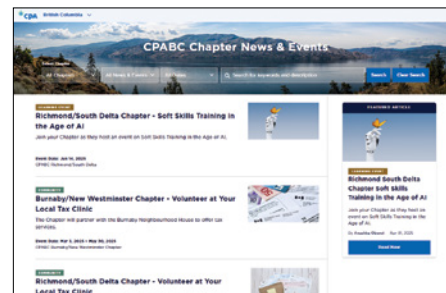
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Public Practice Knowledge Base



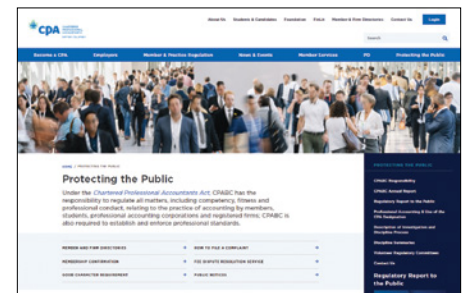
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Chapters



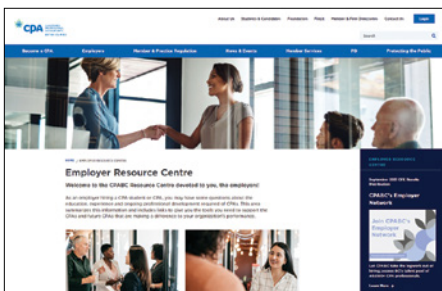
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Protecting the Public



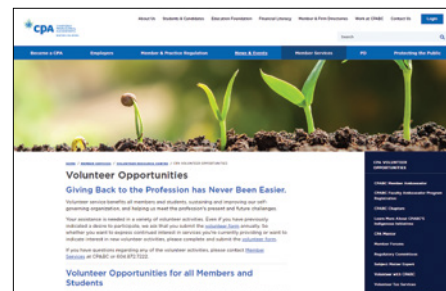
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Employer Resource Centre



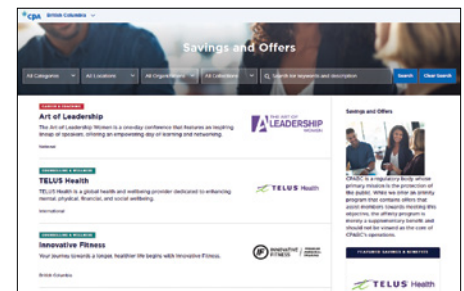
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Volunteer Resource Centre



bccpa.ca/volunteer

Savings and Offers



bccpa.ca/benefits

Celebrating Achievement

Meet the 23 CPAs chosen for Member Recognition in 2024. CPABC celebrates their outstanding leadership, volunteerism, and career accomplishments.

Studio-Pro/DigitalVision Vectors/Getty Images

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.

Justin Brogan, CPA

As an accounting clerk II with the City of Rossland, Justin has applied their leadership, strategic thinking, advocacy, and relationship-building skills to make a positive impact both in Rossland and beyond.

After obtaining the CPA designation in 2022, Justin led the early adoption of the Public Sector Accounting Board's PS 3280 standard on asset retirement obligations, making the City of Rossland an early adopter. They subsequently shared their learnings, processes, and templates with local governments across BC to aid them in adopting PS 3280 as well. Justin's passion for building a more robust local government finance community is also exemplified by their contributions to the Government Finance Officers Association of British Columbia Online Forum.

Equally committed to the broader community, Justin has volunteered with Nelson Pride Society since 2022, leading it through incorporation and applying their accounting skills to improve governance, granting, and sponsorship processes. These efforts have empowered the organization to expand its programming and have improved its long-term sustainability. Through their role with Rossland, Justin also provides advisory services to Rossland Youth Action Network and Rossland Food Bank, enabling both non-profits to provide essential community programs.



"As a volunteer with Nelson Pride, Justin has used their accounting skills to bring strong governance to the entity, enhanced fund development processes, and led queer-friendly events, contributing to a more inclusive Kootenay region."

— Mike Kennedy, CPA, CA, CFO, City of Rossland

George Jecminek, CPA

Just four years after achieving his CPA designation in 2020, George was promoted to the position of partner in MNP's Maple Ridge office in recognition of his exceptional financial expertise and leadership. He has directly contributed to the growth of the firm, bringing in new clients from diverse industries, including manufacturing, real estate and construction, and health care.

In particular, George has significantly expanded MNP's Indigenous services offerings, providing strategic business insight and comprehensive business advisory support to First Nations clients on large and complex audit files. He is also deeply involved in training staff, building their capacity to use data-driven insights to help clients achieve their objectives.

Outside of work, George—one of the top men's tennis players in BC in the mid-2010s and a world tour player from 2012-2018—continues to share his love for the game while giving back to the community. This includes organizing free tennis sessions for junior players and participating in charity exhibition matches. He also supports charitable organizations such as Ronald McDonald House BC & Yukon through a variety of other events.



"George's ability to build new business and lead teams with charisma and vision have been instrumental in expanding MNP's presence."

— Aaron Collins, CPA, CGA, Partner, MNP

Early Achievement AWARD



Tannie Lam, CPA, CA

Tannie is vice-president at Sequeira Partners, a boutique transaction advisory firm in Vancouver. Known for delivering exceptional client service and guiding clients through complex deals—including a recent carve-out transaction for a large multinational firm—she has also played a key role in driving the firm’s growth, leading initiatives that have doubled its revenues. Prior to joining Sequeira in 2019, she was a senior accountant with Bison Transport, where she led due diligence, pricing analysis, and integration for several acquisitions as part of the company’s strategic expansion in the Midwestern United States.

A CPA since 2014, Tannie demonstrates a strong commitment to the profession. She previously taught accounting at the University of Manitoba and currently mentors CPA candidates while also developing training programs at Sequeira.

Tannie is equally dedicated to community service. In addition to advocating for youth development through the Kiwanis Club of Vancouver, she champions diversity and inclusion through leadership roles with the Association of Women in Finance, Association for Corporate Growth BC, and Yi Ping Collective, a group dedicated to connecting, empowering, and elevating Chinese-Canadian business leaders.



“As a highly active member of the organizing committee and incoming chair of events for Yi Ping Collective, Tannie is committed to promoting equity, representation, and leadership in the Canadian business community.”

— Erica McGuinness, CPA, CA, Partner, Sequeira Partners



Kyla Magee, CPA

Kyla is a recognized subject matter expert in the non-profit and credit union sectors who has driven significant growth at MNP’s Kelowna office. In addition to expanding the firm’s services and catalyzing a 45% increase in revenues from clients in the credit union sector, she has spearheaded change-management initiatives, including the integration of new technology in assurance engagements and process efficiencies. In 2021, just five years after earning her CPA designation, Kyla became one of the firm’s youngest female partners.

Her commitment to the CPA profession is equally impressive. As an active member of CPABC’s Okanagan Chapter, which she chaired for several years, Kyla raises the profile of the profession and builds community among local CPAs. She also gives back by mentoring CPA candidates as they prepare for the CFE—thus far, two of her mentees have made the National Honour Roll.

Kyla gives generously to the broader community as well. She has volunteered as treasurer for the YMCA of Southern Interior BC since 2022 and has also championed a team for the YMCA’s Cycle for Strong Kids event, which raises \$200,000 annually.



“As a partner, Kyla has been pivotal in driving the firm’s strategic direction. Her innovative character shines through as an early adopter for technological advancements that create significant efficiencies and advance change.”

— Jennifer Hollis, CPA, CA, Regional Managing Partner, MNP

Nelson Soh, CPA, CA

Nelson is a servant leader committed to inspiring, educating, and driving positive change—mentoring business leaders, shaping financial strategies, and fostering financial empowerment worldwide.

With the support of his team at FSQ Consulting in Vancouver, where he is a managing partner and the CFO, Nelson has helped multiple businesses scale to seven-figure profitability since 2020. His strategic guidance drives sustainable, profitable growth and long-term success.

Since earning his CPA designation in 2014, Nelson has distinguished himself as a forward-thinking leader. As the controller at Innovative Fitness, for example, he increased profitability by 12% in two years. Following this, he served as the manager of finance (Americas) for Cathay Pacific, where he helped lead the implementation of a new enterprise resource planning system that streamlined global operations.

Beyond the boardroom, Nelson champions financial literacy on a global scale. His TEDx talk on financial literacy has reached more than 200,000 viewers organically, and he continues to actively engage audiences through social media. In addition, in 2024, he spoke to more than 2,000 students across the Lower Mainland to equip them with financial literacy knowledge and advocate for the CPA designation.



“As a subject matter expert in financial literacy, Nelson has already helped more than one million people gain a greater understanding of money management and wealth building. His mission is to empower millions more.”

— Michael Cheung, CPA, CA, Director of Finance, Royal Columbian Hospital Foundation

Matthew (Matt) Stam, CPA

Matt became a partner at LLT in Chilliwack in 2019, just two years after obtaining his CPA designation. LLT has since seen a 57% increase in revenues and a 48% increase in staffing, thanks in part to Matt’s expansion of the firm’s CPA Pre-Approved Program and his efforts to enhance its marketing and recruitment strategies. In addition, Matt spearheads LLT’s tax and technology teams and has successfully implemented new systems to improve efficiency and enhance client service.

He also strengthens the profession. As an external advisor to the University of the Fraser Valley’s School of Business, Matt raises awareness of the CPA designation, provides guidance on curriculum development, and gives presentations to business students on the value of a career in accounting.

He has made a significant impact in the community as well, lending his expertise to Ruth and Naomi’s Mission to help strengthen the non-profit’s offerings and ensure its long-term sustainability. During his eight-year tenure as treasurer, the non-profit’s budget increased seven-fold, its staff tripled, and its services expanded to include social housing, addiction recovery, and daycare facilities.



“Matt exemplifies the qualities of an outstanding CPA, consistently helping clients achieve success and make informed financial decisions. Feedback from his clients is uniformly positive, reflecting his dedication and expertise. His outgoing personality fosters strong connections with both clients and staff, and he embodies LLT’s core values in all his interactions.”

— Casey Langbroek, FCPA, FCGA, Partner, LLT

Early Achievement AWARD



Kaleb St. Pierre, CPA, CA

A partner in the real estate and construction practice of MNP's Quesnel office since 2024, Kaleb is recognized as a forward-thinking leader and strategic innovator.

Tasked with starting the Quesnel MNP office in 2021—just four years after earning his CPA designation—Kaleb had to establish new business practices, onboard employees, and build new client relationships. And when the office subsequently merged with a second practice, he led a seamless transition to align systems and reconcile operational workflows, all while continuing to deliver exceptional services to clients.

Kaleb also applies his innovative thinking to his local community. He played a pivotal role in the regional rollout of the Canada Digital Adoption Program grant, which enables businesses to embrace new technologies and contribute to a more dynamic and resilient local economy. In addition, as a board director at Community Futures North Cariboo, a small business centre focused on developing a sustainable and diversified economy in the region, Kaleb served on both the hiring committee for a new executive director and on the executive team during a period of turnover to provide consistency and forward-looking strategic guidance.



"Throughout his career, Kaleb has consistently demonstrated a capacity for transformative leadership. Since joining MNP, he has made a sizable impact, consistently showcasing exceptional dedication, leadership, and mentorship in his role. Kaleb is an invaluable member of the team who truly deserves this recognition."

— Jameel Sayani, CPA, CA, Regional Managing Partner, MNP



Frederick (Fred) Wong, CPA

Fred's specialized expertise in indirect tax has made him a national and international leader at BDO Canada in Vancouver. As a recognized subject matter expert on Canadian ESG tax issues within BDO Global, he works closely with BDO member firms around the world to help their clients do business in Canada.

Fred's interest in tax and policy keeps him at the forefront of research on new tax legislation. Shortly after obtaining his designation in 2019, and while serving as a first-year manager at BDO, he played a lead role in interpreting legislative and policy updates and shared feedback on technical issues with both CPA Canada and the Department of Finance.

Also a skilled people manager, Fred mentors CPA students at BDO and oversees the firm's recruitment and onboarding initiatives. He further contributes to CPA recruitment by volunteering as a CPA Ambassador, working tirelessly to raise awareness of financial literacy and promote the profession to high school students, and by coaching UBC accounting students in the JDC West competition. As a director-at-large with CPABC's Vancouver Chapter, he also organizes marquee social events for hundreds of CPAs.



"It's difficult to think of Fred Wong without also thinking of CPA. He does an exceptional job of representing the CPA designation in the community through his numerous roles and contributions, including organizing marquee chapter social events, presenting at high schools as a CPA Ambassador, volunteering to coach accounting students, and promoting the profession as a campus recruiter."

— Darren Taylor, CPA, CA, Partner, BDO Canada

Distinguished Service AWARD

The CPABC 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.

Amy Bonner, CPA, CA

Amy is a generous mentor and leader who inspires positive change both through her work as the director of finance at Telus in Vancouver and through her service in the profession and the community.

As a member of Telus's Financial Management Development Program Steering Committee, Amy supports the organization's pre-approved program for CPA candidates and advises on initiatives to improve professional models and practices. She is also a highly respected and sought-after coach and mentor of CPA students and early-career CPAs.

After her daughter was diagnosed with a rare genetic condition called Williams syndrome, Amy became involved with the Canadian Association for Williams Syndrome (CAWS) as a board director and treasurer. In addition to using her CPA expertise to revitalize governance practices, secure new funding, and advise on strategic planning, she has organized fundraising campaigns for the non-profit organization and is the author of the children's book *Life with Williams Syndrome*, the proceeds of which have been donated to CAWS.

In 2017, Amy combined her passions for entrepreneurship and philanthropy by launching UNION Swimwear, a socially responsible business that donated profits to an organization funding clean water projects in Cambodia and Ethiopia.



"Amy has a long history of volunteering and leveraging her skills as a CPA to improve communities locally and abroad. For example, as a volunteer with the Canadian Association for Williams Syndrome, Amy mentors families navigating the challenges of our health-care system for those with a Williams syndrome diagnosis by connecting them to vital resources and leveraging her extensive network."

— Gopi Chande, FCPA, FCA, CFO, Telus Digital

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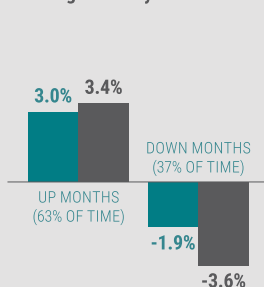
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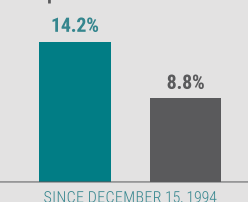
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Ross Turnbull,
CPA, CA, CBV, CFA, ICD.D
Vice President, Director,
Portfolio Manager

CPABC Member Recognition Program

CPABC is proud to recognize its leaders, volunteers, and educators.

DO YOU KNOW AN OUTSTANDING CPA?
Nominate them for a Member Recognition Award.

EACH YEAR, AWARDS ARE GRANTED IN THE FOLLOWING CATEGORIES:

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

Recognizes members who have been actively involved for many years in volunteer activities for their dedication, commitment, and outstanding contributions either to the CPA profession or to one or more not-for-profit or charitable organizations.

EARLY ACHIEVEMENT AWARD

Recognizes 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

4:00 p.m. | Monday, September 15, 2025



Distinguished Service AWARD

Brendan L'Heureux, CPA, CA

Among his achievements as a financial advisor to the Government of Canada, Brendan spearheaded a cross-Canada assurance project on large-scale federal funding and had the distinction of being posted to the Canadian Embassy in Warsaw to support Ukrainian refugees.

Outside of his day job, Brendan is highly respected for his efforts to advance the profession internationally. As a Canadian representative of CMA Sri Lanka, he was instrumental in negotiations between Sri Lanka and CPA Canada to develop a locally produced public sector accounting certification for the Sri Lankan civil service.

Brendan is equally respected for his 12 years of service in support of St. John Ambulance, first in Sri Lanka and then in Canada. As treasurer of the board of directors for the BC and Yukon region, he was instrumental in strengthening the charity's financial accountability and stability, implementing new fiscal governance processes that have helped ensure its continued ability to provide life-saving services. Today, Brendan serves as the BC and Yukon board chair. In recognition of his contributions, he was named an Officer of the Order of St. John in 2024.

In addition, Brendan helps train the leaders of tomorrow through his service as a commissioned officer with the Royal Canadian Army Cadets.



"As a director and chair with St. John Ambulance BC and Yukon, Brendan demonstrates his true passion for giving freely of his time in the interest of supporting lifesaving community service initiatives."

— E. David Hodgins, Board Director & Past Chair, St. John Ambulance BC and Yukon

Joanne YH Liu, CPA, CGA

As the principal of Joanne YH Liu Company Inc., the public accounting and financial planning firm she launched in Richmond in 2015, Joanne is a trusted financial professional for individuals and businesses. She's equally respected for her unwavering commitment to the profession, which includes contributing her leadership to the CPABC Burnaby/New Westminster Chapter. As the chapter's dynamic chair from 2019 to 2024, she organized popular learning and social events (from summer barbecues to Lunar New Year celebrations), launched student events in collaboration with Douglas College, and led fundraising and volunteer initiatives in support of the Greater Vancouver Food Bank.

Also a champion of financial literacy, Joanne has volunteered with CPABC's Financial Literacy Program since 2015 and helped extend the program's reach by delivering its first session in Mandarin in 2021. Since 2013, she has also shared her expertise in money management and financial literacy as a volunteer with S.U.C.C.E.S.S., offering newcomers to Canada accessible seminars on complex topics—from tax and fraud protection to managing finances in retirement.

In addition, Joanne served as vice-chair and director of the Canwest Taiwan Board of Trade, helping to advance the organization's goal of enhancing business relations between Canada and Taiwan.



"Joanne exemplifies a dedication to service, education, and community empowerment. Her contributions have left a profound and lasting impact on both the CPA profession and the community at large."

— Stanley Chang, FCPA, FCGA, Director

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.



Tahir Ayub, FCPA, FCA

Tahir is an accomplished leader with a proven record of inspiring team members, advancing innovative strategies, and delivering value. In 2023, as executive vice-president and CFO of OpenRoad Auto Group, he led the single largest syndicated banking facility of any automotive group in Canada to support OpenRoad's continued growth. He has also been a driving force for a culture of excellence, developing OpenRoad's equity-based compensation plan, establishing an ESG function, and launching the OpenRoad Foundation to support local charities.

Before joining OpenRoad, Tahir held progressively senior roles in a three-decade career at PwC, including his role as national managing partner and a global platforms leader, where he identified the megatrends that would be shaping industries and initiated a global strategy to help clients leverage innovation and embrace change.

Tahir shares his leadership and expertise in service of the broader community as well, volunteering with a variety of non-profit and charitable organizations. He is a past board director with Outward Bound Canada and the Women Presidents Organization and currently serves as a board member and vice-chair of Hope Air, a charity that provides free flights and accommodation to people travelling for medical appointments.



"Through the significant contributions and counsel of Tahir, Hope Air was able to navigate through the pandemic crisis. With Tahir's experience, skill, and guidance, management were able to continue our charitable operations while at the same time ensuring that we maintained a strong financial foundation."

— Mark Rubinstein, CEO, Hope Air



Archie Campbell, FCPA, FCA

Archie is a dedicated and skilled leader who has grown revenues and built high-performing teams at some of BC's most respected businesses. Prior to his current position as CEO of Windsor Plywood, he served as both operational COO and president of Coast Appliances. At Coast Appliances, he led data-focused initiatives to both optimize customer service and capitalize on the boom in product demand, achieving record sales in the process.

Throughout his career, Archie has consistently spearheaded investments in people development. As CFO of Arrow Transportation Systems (2011-2020), for example, he fostered a collaborative team culture to enable rapid growth and diversification. He has also held executive positions at Golden Boy Foods, FPI Fireplace Products International, and Epic Data.

Active in governance as well, Archie has volunteered with CPABC for five years, focusing on professional standards. He is also deeply committed to community service, and his adventurous and generous spirit is exemplified in his multi-year participation in the Easter Seals Drop Zone® fundraising challenge, where he dons a superhero costume and rappels down 20-storey buildings. So far, Archie has personally raised more than \$150,000 for Easter Seals to support programs and services for individuals with disabilities.



"Archie has a very rare set of skills, education, and commitment to his profession. He has great communication skills, is excellent at team building, and has an ongoing commitment to professional education and refinement of his professional qualifications."

— Robert Little, Founder & Past CEO, FPI Fireplace Products International Ltd.

Derek Cockburn, FCPA, FCGA

For more than 30 years, Derek's vast experience in financial management, contract management, procurement, and strategic planning has strengthened the government financial sector. In his current role as director of procurement for the Ministry of Jobs, Economic Development and Innovation, he supports three economic sector ministries and multiple crown corporations, and his guidance on streamlining procurement processes has set a new standard for excellence in public administration.

As a member of the BC Public Service Procurement Council since 2014, Derek promotes a collaborative approach, and his leadership in modernizing the Council has made it a model for other Canadian jurisdictions.

Derek's influence is not just felt in BC. He's also respected nationally for his contributions to the Financial Management Institute of Canada (FMI). As national chair from 2019 to 2023, he restored FMI's financial health and modernized its governance structures. He has also demonstrated his commitment to the public sector financial community by planning and delivering a multi-day professional development course at FMI Victoria's annual learning event.

In addition, Derek is a highly regarded mentor and teacher who has inspired the next generation of accounting professionals for over 30 years as an accounting instructor at Camosun College, the University of Victoria, and Royal Roads University.



"Derek has demonstrated exceptional leadership throughout his career in BC's public service sector. In his current role, his innovative approach and strategic vision have resulted in substantial improvements in procurement efficiency and provincial best practices, benefiting the entire public sector and ultimately the public at large."

— Jon Cruz, CPA, CGA, Senior Director of Finance, Ministry of Tourism, Arts, Culture & Sport

Shelley Gilberg, FCPA, FCMA

Known for her expertise in technology-enabled business transformations, Shelley uses her role as PwC's managed accounts leader to guide organizations in implementing strategic initiatives and addressing sustainability risks.

Her stellar achievements at PwC include growing four platforms that represented 65% of the firm's value to clients while serving as its Canadian platforms leader (2022-2024). And as PwC's ESG markets leader (2021-2024), Shelley developed the market approach and integrated services to expand a small group of talented professionals into a team of 400 that now provides sustainability services to 70% of PwC's top clients—effectively growing the practice tenfold.

Shelley had an equally significant impact at IBM Canada, where, as vice-president of the BC public sector and Canadian and global health-care leader (2008-2018), she led the company's role in introducing the BC Services Card and expanded its public health solution to global clients. Earlier in her career, she developed an international marketing strategy that helped BC achieve \$76 billion in economic growth in priority sectors.

Also a recognized leader in advancing opportunities for women in the tech community, Shelley is a founding member of the Vancouver chapter of Canadian Women in Technology. Additionally, for over 10 years, she has given back by mentoring business students at SFU and UBC.



"Thanks to Shelley's leadership, we have not only attracted top talent in the sustainability field but also increased our sustainability-related services tenfold. Her contributions have been instrumental in positioning PwC Canada as a clear market leader in sustainability."

— Nicolas Marcoux,* CEO, PwC Canada (*Nicolas is an FCPA, FCA, in Quebec)

Fellowship



Shane King, FCPA, FCA

A partner at MNP in Surrey, Shane is a respected leader in his profession and community who is committed to developing the talents of his team while working with clients to implement strategies that significantly improve profitability.

Shane plays a pivotal mentorship role at MNP as a lead facilitator and instructor of the firm's "Becoming a Trusted Advisor" courses, which support CPA staff members in honing their skills and strengthening their client relationships. His myriad contributions to the firm also include serving as national leader of succession services from 2016 to 2024.

Shane extends his expertise beyond the firm as well. A proud alumnus of Kwantlen Polytechnic University, he chaired Kwantlen's board of governors during the institute's transition to a polytechnic university. This meant overseeing the management, administration, and governance of the university's property, finances, operations, and direction.

He also shares his knowledge of business transitions, financial planning, family businesses, and retirement planning through *Business in Vancouver's* Business Excellence Series. Active in the broader community as well, Shane is a board director with the Peace Arch Hospital Foundation, and his contributions have been credited with helping the foundation reach ambitious goals to enhance health-care services in White Rock.



"As a finance committee member, Shane has been influential around major projects that have recently come to completion at the hospital, including the opening of new operating rooms, expansion of acute services, and acquisition of critically needed equipment. His engagement highlights his long-term commitment to improving health-care facilities and community services."

— Stephanie Beck, CEO, Peace Arch Hospital Foundation



Bruce Sprague, FCPA, FCA, CPA (Illinois)

Bruce is a senior partner at BDO Canada and the firm's market leader for Greater Vancouver and Western Canada. In addition to leading the Vancouver tax practice to double-digit growth and expanding the team locally, he continues to help build BDO's profile in the Western Canadian market and add exceptional talent—including through the expansion of the business in Saskatchewan.

His expert guidance has long benefited Canada's mining sector as well. As the national mining industry leader for EY Canada from 2012 to 2017, Bruce advised some of the country's largest mining companies. He also raised the sector's profile as a member of the industry advisory council for UBC's Keevil Institute of Mining and as a board member for the Mining Association of Canada. Today, he continues to support the sector by sharing his insights on a variety of topics, including the power of data analytics and generative AI in mining.

Bruce also provides sound governance to the broader community. His many past contributions include serving as a director of the Greater Vancouver Board of Trade and as a board member for the Coquitlam Adanacs Field Lacrosse Association and the Vancouver Aquarium. Currently, he volunteers as a board and governance committee member for the Kelowna General Hospital.



"Bruce's proactive approach to leadership has fostered a culture of innovation and collaboration, enabling our team to navigate complex challenges and deliver exceptional client service. His contributions extend beyond the firm; he actively provides guidance and support to foster growth and development at various community organizations."

— Rachel Gervais,* Managing Partner, BDO Canada (*Rachel is a CPA, CA, in Ontario)

Mikaela Taylor, FCPA, FCA

Mikaela is a partner at BDO Canada, known for her exceptional technical expertise, meaningful client engagement, and passionate commitment to mentoring the next generation of CPAs. She is highly respected for providing quality oversight on complex engagements and has guided her national team of 700 professionals and partners to achieve growth of 100% over five years. Additionally, as the Canadian member of BDO's global audit steering committee since 2023, she oversees the firm's audit methodology and adoption of new assurance standards.

Mikaela previously worked at KPMG, including as a partner in audit (2012-2015). During her almost 20-year tenure with the firm, she significantly contributed to BC's aerospace and life sciences industries—this included advising ID Biomedical during its sale to GlaxoSmithKline and volunteering as a member and treasurer of the Aerospace Industry Association of BC.

A dedicated volunteer in both the CPA profession and the broader community, Mikaela has served as a member and chair of various CPABC committees and forums since 2017 and has volunteered with Westcoast Family Centres Society for 20 years. As the Society's board treasurer, she provided her financial expertise to guide a nine-year project that developed a community-based hub to co-locate essential programs for families.



"Mikaela is known for her innovative and progressive approach to problem-solving. She has successfully led high-impact and stressful service line initiatives to optimize operations, increase efficiency, and seek progress in our operations."

— Jeanny Gu, CPA, CA, Managing Partner, BDO Canada

Paul Townsend, FCPA, FCA

Paul is a highly regarded advisor in the areas of risk, audit, and compliance who is recognized globally for his forward-thinking approach to internal audit services.

Prior to founding TRA Risk Advisory in 2019, Paul worked for 16 years with Teekay Corporation, where he built best-in-class global enterprise risk management and audit functions. In addition to serving as the chief audit executive, chief risk officer, and chief compliance officer for all four of Teekay's NYSE-listed companies, he led high-profile projects in scenario planning, initiated a risk-rating system for product development and acquisitions, developed a compliance program, and delivered ethics training in 17 countries.

A leading figure in the growth of the Maritime Anti-Corruption Network (MACN), Paul served as vice-chair of MACN's board of governors from 2016 to 2019. During his tenure, membership grew threefold and the UN recognized MACN as a leading change agent for global anti-corruption initiatives. He also shared his in-depth experience in anti-corruption, risk management, compliance programs, and ethical leadership at MACN conferences and other venues.

Equally committed to charitable initiatives, Paul chairs the audit and finance committees for Kurumbuka Leadership Solutions, an organization that empowers educational leaders in Africa, and the TK Foundation, which supports underprivileged youth and maritime causes globally.



"Paul brought countless initiatives to the Maritime Anti-Corruption Network, and we all benefited from his clear, deep experience in matters of audit, compliance, and accountability. He was always personable, industrious, dedicated, and operated with the highest ethical standards."

— John Synnowich, Chief Legal & Sustainability Officer, The CSL Group Inc.

Fellowship



Kay Wong-Alafriz, FCPA, FCA

Kay is a financial expert whose vision and commitment to both business growth and community impact have distinguished her as a leader in finance and strategy.

Since 2017, she has leveraged decades of multi-industry experience to drive organizational success at Kabam, a subsidiary of Netmarble Corp., a global gaming company based in Korea. Under her leadership as CFO, Kabam has grown into a multi-billion-dollar enterprise and expanded to six locations. With her strategic financial management and oversight of data analytics and machine learning, Kay has driven cost efficiencies and helped the company achieve sustained profitability. These achievements garnered her *Business in Vancouver's* BC CFO of the Year Award (small and medium enterprise category) in 2023.

Prior to joining Kabam, Kay held diverse leadership roles across industries. These include serving as an anti-money laundering expert for the RCMP, directing the Airport Improvement Fee program for the Vancouver Airport Authority, and serving as CFO and senior VP of the Grand Ho Tram/Asian Coast Development Ltd., where she led the funding, development, and operation of a \$4.2-billion resort investment in Vietnam.

Beyond her corporate achievements, Kay has been a dedicated board member of the Vancouver Community College Foundation since 2006, providing strategic guidance on fundraising, scholarship distribution, and campus modernization.



"Kay's experience integrating financial expertise with business strategy represents the future of the CPA profession: technically skilled, strategically minded, and committed to developing the next generation of leaders."

— Tina Lai, Chief People Officer, Kabam





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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.

Beverley (Bev) Briscoe, FCPA, FCA

Bev has had an extraordinary career, holding leadership roles in many traditionally male-dominated industries, purchasing her own company in the transportation services industry, and chairing the boards of high-profile organizations. A pioneering and values-oriented leader, she has demonstrated an extraordinary ability to create value, drive innovation, and lead companies through change.

As board director and chair of Ritchie Bros. Auctioneers (2004-2020), she helped guide the company into becoming a global leader in the heavy equipment auctions industry; she also played a central role in acquisitions, a digital expansion, and C-suite transitions. While serving as audit committee chair and lead director of Goldcorp Inc. (2006-2019), she oversaw its significant growth into a world-class gold producer while setting industry-leading standards for corporate social responsibility. She also served as a board director and chair of Kal Tire (2017-2024), the BC Forest Safety Council (2009-2010), and the Industry Training Authority of BC (2003-2007).

Since 2021, Bev has been a corporate director at PwC Canada; as one of the firm's first external directors, she has diversified its governing body and continues to oversee best-in-class governance.

Bev has made equally significant contributions as a volunteer to organizations that support education, women in leadership, and health care. She served on the faculty advisory board for UBC's Sauder School of Business (2007-2016), was a board director for the Forum for Women Entrepreneurs (2003-2010), and served as treasurer of the VGH & UBC Hospital Foundation (2012-2018). Bev also chaired the board of the Boys and Girls Club of Greater Vancouver (1998-2009) and helped secure funding that enabled the club to expand its reach and community impact.

In 2011, Bev was honoured with *Business in Vancouver's* Influential Women in Business Lifetime Achievement Award. The following year, she received the ICD Fellowship Award, the highest distinction for corporate directors in Canada.



"Bev makes sure that she leaves a lasting mark on the organizations she works with; her goal is to create value that leaves them in a much better position than when she first arrived. She also brings out the best in people. She is a leader with heart who gains confidence in doing what is right."

— Christina Anthony, Vice-President, Odium Brown and Founder, The Forum

"Bev's dedication and community service make her a credit to the CPA profession. Throughout her career, she has been a trailblazing, values-driven leader and entrepreneur who has contributed countless volunteer hours and generously donated her time to mentor others in the community."

— Darren Dahl, Dean, UBC Sauder School of Business



Lifetime Achievement AWARD



William (Bill) Davidson, FCPA, FCA

As the founding partner of Davidson & Company, Bill is a highly respected and well-known leader in the business community and the accounting profession. In the decades following his launch of the firm in 1984, Bill strategically built Davidson & Company into a leading independent auditing and full-service business. Under his leadership, the firm has grown from having two partners in 1984 to 23 partners and over 150 staff today. Now the largest auditor of public companies in Western Canada, Davidson & Company has more than 500 reporting issuer audit engagements in both traditional industries like mining and oil and gas, and in emerging sectors, including crypto and cannabis.

A staunch supporter of Nexia International, an international affiliation of accounting firms, Bill helped elevate Nexia's global standing as a top 10 accounting network by expanding its reach, driving growth, and fostering collaboration among CPAs globally. In addition, he served for more than five years as deputy chair of Nexia Canada.

Bill is also a dedicated volunteer within the profession and a respected and influential mentor known for his efforts on behalf of the next generation of accounting leaders. In addition to establishing a scholarship for undergraduate business students at Simon Fraser University who are interested in pursuing the CPA designation, he continues to advocate for accounting students from SFU.

Bill enthusiastically extends his support to non-profit organizations as well, benefiting both individuals and communities. For example, he played a crucial role in the launch of the Bettie Allard YMCA in Coquitlam through his fundraising efforts, which helped the capital campaign committee reach its ambitious goal of \$4 million. In addition, he has been an active member of the Rotary Club of Vancouver since 1993, and his service to Rotary, which includes serving as Club president, has garnered him two Paul Harris Fellowship Awards.



"Bill has been a pillar in the community and accounting world for over 40 years, dedicating his life to advancing in ways that have left an indelible mark. His visionary leadership has not only driven innovation but has also inspired countless others to pursue excellence with the same passion and integrity that Bill exemplifies.

"Bill's dedication to community service, charitable work, and other activities has had a profound impact on the lives of many, embodying the true spirit of service and leadership. His legacy is one of innovation, inspiration, and unwavering commitment to excellence."

— John F. Gale, President (Retired), St. Thomas More Collegiate

"When I joined Davidson & Company LLP, from day one Bill's mentorship and guidance were invaluable. I learned quickly that ambition and hard work were not enough to succeed—strong mentorship, sound judgment, and integrity were the cornerstones Bill lived by and imparted to everyone at the firm."

— Erez Bahar, CPA, CA, CPA (WA), Managing Partner, Davidson & Company



Daneal (Dan) Little, FCPA, FCA

Throughout his career, Dan has exemplified a passion for nurturing talent and promoting and strengthening the accounting profession. Before his retirement in 2022, he was the managing partner of Doane Grant Thornton's Vancouver Island business unit. In addition to supporting a staff of 100, he oversaw three complex mergers and positioned the firm for sustained growth and success. As a member of its national senior leadership team, he also contributed to the firm's strategic development across the country.

From 2005 to 2014, Dan was a board member and chair (2008-2010) of Island Savings Credit Union, playing a key role in guiding the discussions and negotiations that led to the organization's successful 2014 merger with First West Credit Union.

Dan garnered the deep respect of CPAs across BC and Canada for his leadership during the unification of BC's accounting profession and his dedication to ensuring that all actions prioritized the protection of the public interest. As co-chair of CPABC's Transitional Steering Committee in 2015, he played a critical role in bringing together the best practices from the three legacy bodies. He then provided national leadership and helped establish common standards across all provincial partners through his work as the BC & Yukon representative on the CPA Canada Board from 2017 to 2023.

A community volunteer for more than 30 years, Dan is currently a committee member for the Cowichan District Hospital Foundation, which is spearheading a capital campaign to raise \$20 million for critical equipment for a new hospital. He also gives back by participating in an annual charity ice hockey tournament that has raised over \$100,000 for the ALS Society of BC over the past two decades. In recognition of his outstanding service to the profession and his community, Dan received the Queen's Diamond Jubilee Medal in 2014.



"What truly sets Dan apart is his unwavering commitment to developing people. He recognizes that the strength of our profession lies in the growth and development of its members. Dan's focus on empowering individuals has not only enhanced our team but also has a positive ripple effect on the broader community, fostering a culture of excellence and resilience."

— Tara Benham, FCPA, FCA, Partner and National Tax Leader, Tax Services,* Doane Grant Thornton (*a partner through T.L. Benham Ltd.)

"Dan's commitment to the process of unification, ensuring the foundation was established by bringing best practices of the three legacy organizations together, was exceptional. Most work was consensus based; however, there were instances where Dan's leadership and principles helped lead to decisions to better serve the public interest."

— Simon Philp, FCPA, FCMA, Market Vice-President, CIBC



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Moon logo by Robert Mearns, commissioned by CPABC in February 2020.

An Update on CPABC's Indigenous Engagement Strategy

By Lori Mathison, FCPA, FCGA, LLB

CPABC is committed to making the accounting profession more attractive and accessible to Indigenous individuals, and to supporting Indigenous candidates, students, and prospects who enter the profession. To these ends, we continue to work with and seek to understand the needs of our Indigenous members, and we continue to listen to and collaborate with Indigenous partners and organizations.

Here's an overview of some of the key activities and initiatives undertaken since we published our last update in the May/June 2024 issue of *CPABC in Focus*.

Bringing members together

I'm pleased to say that CPABC has more than 280 self-identified Indigenous members. In addition to building a connection with them, one of our goals is to provide opportunities for our Indigenous members to meet and network with each other.

This was the impetus behind the creation of the Indigenous Members Forum in 2023. The forum is a virtual gathering space open to all Indigenous members, with some meetings open to non-Indigenous CPA allies as well. The most recent meeting, held on March 25, 2025, featured a presentation on the Indigenous Learners in Accounting (ILA) initiative. Launched by the Chartered Professional Accountants Western School of Business (CPAWSB), CPA Canada, and the Aboriginal Financial Officers Association of Alberta, the ILA initiative incorporates Indigenous culture, content, and context with the goal of increasing Indigenous representation in accounting.

Presenters Yuen Ip, CPA, CMA, MBA, PMP, ICD.D, the CEO of CPAWSB, and Robert Andrews, DBA, MBA, CAFM (Blood Tribe),* provided an overview of the ILA courses. While these courses are based on the regular CPA certification program and lead to the CFE, they are tailored to address challenges unique to Indigenous learners. A recording of this session is available at bccpa.ca/about-cpabc/cpabc-indigenous-engagement, and you can find more information about the ILA initiative at cpaweb.ca/indigenous-learners-in-accounting.

CPABC also hosts in-person “meet-up” events to foster connection and communication among Indigenous CPAs. Three such events have been held since our last update: the first in Vancouver, the second in Victoria, and the third and most recent in Kamloops. For recaps of these gatherings, visit bccpa.ca/about-cpabc/cpabc-indigenous-engagement.

Engaging Indigenous youth and communities

Over the past year, we travelled across the province to connect with Indigenous communities and share information about careers in accounting and financial literacy resources with Indigenous youth and community members.

This included attending the SFU Student Powwow, the Kamloopa Powwow, the Squamish Nation Youth Powwow, the VYPER Youth Powwow, and the Stalew Powwow. We also participated in the Indigenous Partnerships Success Showcase, the AFOA BC & Bears’ Lair TV Youth Entrepreneur Summit, the Métis Nation of British Columbia Annual General Meeting, Cando Links to Learning, and Indigenous Gathering on Pathways in Business events at UBC and TRU. You can find recaps of many of these events in the News & Events section of the CPABC website at bccpa.ca.

Most recently, we participated in the Gathering Our Voices conference for Indigenous youth. More than 1,000 Indigenous youth from across BC attended the 2025 event, which was held from March 18 to 21 in Kamloops. In addition to engaging with attendees through our exhibitor booth during the conference’s career fair, we once again hosted five financial literacy sessions, including: “Money Basics for Indigenous Teens,” “Navigating Your First Tax Return,” and “Budgeting for Independence.”

*Yuen Ip is also a CPA, CMA, in Alberta. Robert Andrews is an FCPA, FCMA, in Alberta.

Enhancing internal initiatives

Another of our goals is to include Indigenous perspectives in CPABC’s internal programming. With this in mind, I’d like to take this opportunity to introduce you to **Jesse Bruised Head**, or **Sipisskoonakii** (Night Shooter) in the Blackfoot language, who serves as CPABC’s Indigenous engagement program manager. Jesse is a proud member of the Siksikaittsiitapiiksi (Blackfoot People) of Treaty 7 territory. He hails originally from the Blood Tribe of Southern Alberta, one of four nations within the Blackfoot Confederacy, and was raised in his home territory.

Jesse pursued his post-secondary education at the University of Calgary and the University of Lethbridge. Before joining CPABC, he served the Blood Tribe as a youth program co-ordinator and as a small business development officer. Deeply connected to his culture and community, both professionally and personally, Jesse is committed to helping the CPA profession become a trusted partner to the Indigenous community.

Jesse also lends his perspective to educational sessions for CPABC staff, including an annual learning event focused on the National Day for Truth and Reconciliation.



Raising awareness

To bring additional awareness about Indigenous history to our members, we added the online course “4 Seasons of Reconciliation” to CPABC’s Continuing Professional Development Program. Offered in partnership with Red River College Polytechnic in Winnipeg and First Nations University of Canada in Regina, this course is available to CPABC members and members of other interested provincial bodies thanks to an agreement negotiated by CPA Manitoba.

The course is offered at a reduced rate, and participants receive a certificate at completion. You’ll find more information at bccpa.ca/about-cpabc/cpabc-indigenous-engagement—select “Reconciliation Education for Members” from the right-hand navigation menu.

How to get involved

If you’d like to volunteer in support of CPABC’s Indigenous Engagement Strategy, we would be very pleased to hear from you. Please contact indigenous@bccpa.ca for more details. ■

Lori Mathison is the president & CEO of CPABC.

A Decade of Providing Value

CPABC provides members, candidates, students, and the public with a wide range of services and initiatives that focus on protecting the public, regulatory compliance, education and learning, networking, recruitment, and volunteerism.

To understand the positive impact of these services and initiatives over the past decade, here's a quick look at the numbers.

Since 2015:

The number of members has increased by over **10,000**, bringing the total to

40,000+.

The number of licensed practitioners has increased by over **1,400**, bringing the total to

4,700+.

22,000+ member and public inquiries have been handled by CPABC's member advisory services team.

15,000+ attendees have participated in meetings held by CPABC's various member forums.

36,000+ jobs have been posted to CPABC's Careers Site.

The number of registrations for CPABC PD Program courses—over half of which were for free offerings—has surpassed

608,000.

71,000+ attendees have participated in events hosted by CPABC's regional chapters.

209 honourees have been recognized through CPABC's Member Recognition Program.

The number of individuals following CPABC on its various social media platforms has grown to **51,000+**.

~115,000 individuals have attended CPABC's recruitment events.

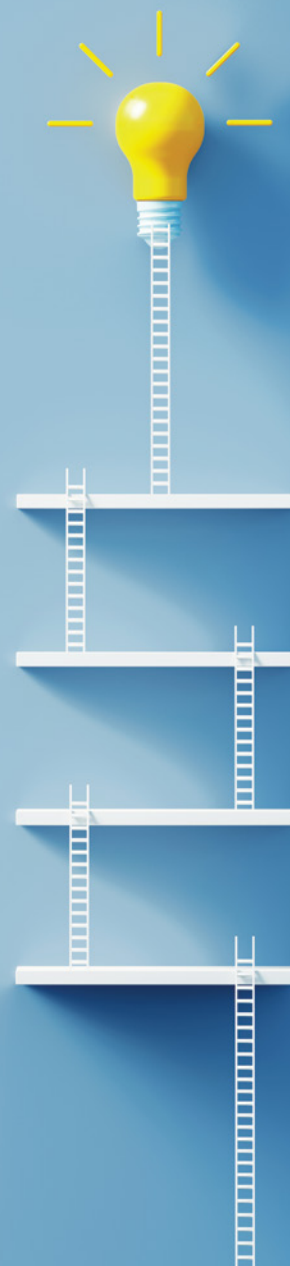
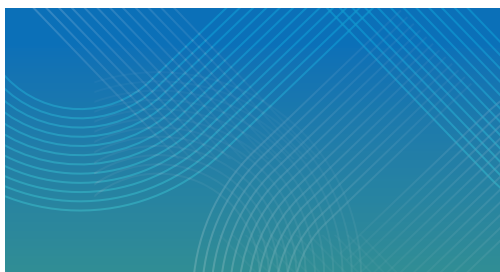
65,000+ British Columbians have attended CPABC's free financial literacy sessions.

\$267,000+ has been provided to CPA members who have applied for short-term financial assistance through CPABC's Benevolent Fund.



282 members have self-declared as Indigenous. Additionally, **70** Indigenous candidates are now enrolled in CPA PEP.

\$1,000,000+ has been provided to students by the CPA Education Foundation of BC (CPAEF) in the form of educational awards, bursaries, and scholarships. The CPAEF has also distributed almost **\$240,000** to accounting educators through PD Passports and **\$220,000** to doctoral candidates and programs.



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Neurodivergence at Work: The Benefits of Being “Different”

By Kerri Brkich



Martha Okot Thomas, CPA, CA, CIA. Photos by Brit Kwasney Photo.

As part of CPABC’s commitment to creating a profession that is diverse, equitable, and inclusive for all, we continually seek to understand and share the diverse stories of our members. This includes members who are neurodivergent.

Generally speaking, being neurodivergent means “having a style of neurocognitive functioning that is significantly different from what is considered ‘typical’ by societal standards.”¹ One of the most commonly diagnosed and recognized forms of neurodivergence is Attention Deficit Hyperactivity Disorder (ADHD), which affects an estimated 1.8 million Canadians—roughly one in every 21 people in the country.²

Among them is CPABC member Martha Okot Thomas, CPA, CA, CIA, an accounting and finance educator and chair of the finance and accounting department in the School of Business at Camosun College. Martha has more than 25 years of experience in the public sector, which includes working in internal audit for the BC Investment Management Corporation and serving as CFO for the BC Ministry of Social Development and Social Innovation and as director of financial planning for the Ministry of Finance. She has taught courses for CPABC’s PD Program, is a past member of the CPABC Board of Directors, and currently chairs the CPA Education Foundation of BC. She’s also the mother of two daughters.

Martha recently sat down with me to talk about the impact of her ADHD diagnosis and how it feels to navigate a predominantly neurotypical professional world.

You were recently diagnosed as neurodivergent. Can you tell us how that came about?

It’s interesting—I’ve always known that there was something different about me. And one night a friend asked if I’d ever looked into the possibility of being neurodivergent. I had never really thought about it before, but as soon as she said it to me, I thought, “This makes so much sense.” So I went and I had a full diagnosis done with a proper psychologist.

What was the actual diagnosis?

100% ADHD. There are two kinds of ADHD: one with a predominance in inattention and one with a predominance in hyperactivity and impulsivity. I had a combined assessment. By that point, I wasn’t surprised—after reading about ADHD, I actually approached *them* and said “There’s no question in my mind that I have this.”

¹ Canadian Centre for Diversity and Inclusion, ccdi.ca.

² Centre for ADHD Awareness, Canada, “About ADHD,” caddac.ca.

“Having a name for what I was experiencing brought me a sense of release and relief. First and foremost, I now know I’m not broken.”

Prior to this diagnosis, did you think certain aspects of ADHD were character flaws?

Yes. I think I always thought I was broken—that something was wrong with me because I always found it challenging to fit in or behave in certain ways. The world is neurotypically centred, and if you stray from that, your behaviour can be judged as inappropriate. So, I spent many years managing all of the emotions that I now understand come along with having ADHD without knowing what caused them. It’s called “masking,” which means containing emotions and altering behaviour to appear acceptable. And honestly, it’s exhausting.

Also, the challenge of being a female when I grew up was that I was just seen as emotional and reactive, which ultimately led to me being diagnosed with anxiety and depression. So when people ask, “How did you not know?” I say it’s because nobody ever looked at me that way. As a result, I had the constant stress of feeling like I needed to behave in a certain way to fit in and to be understood. No wonder I had anxiety and felt depressed!

That’s mental energy that you can’t put into other areas.

Yep. And the biggest challenge was that I’d get a lot of praise for my boundless energy but then get labelled as the “gifted problem child.” People knew I was smart and capable, but they’d end up tiptoeing around me. Things would have been so different, I think, had I understood what was happening, because I wouldn’t have tried to fight it all the time. I would have understood why I was reacting in certain ways and known that I could get through a situation without bursting into tears or behaving in other ways that weren’t effective.

Is that what this diagnosis has done for you?

Yes, it has provided absolute clarity. Having a name for what I was experiencing brought me a sense of release and relief. First and foremost, I now know I’m not broken. My coach said I’m now driving with both hands on the steering wheel, which feels appropriate. I’m no longer fighting to contain my emotions now—I know why I have them and what they mean.



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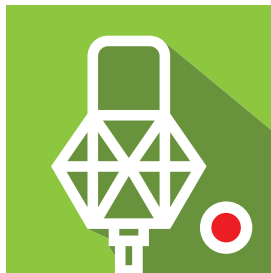
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Listen to the conversation: “Neurodivergence at work”

To access the podcast version of this interview, conducted in February 2025 for the Coffee Chats with CPABC podcast series, visit bccpa.ca/news-events/cpabc-podcast.



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I've also done a lot of counselling and put the work in to understand the ways I used to compensate and mask my emotions to be effective.

Do you think things would've been different if you'd been diagnosed as a child?

I promised myself I wouldn't go down the "what if I'd known" rabbit hole—it's not productive. So I'm in a process right now where I'm kind of reframing my past experience. I'm looking back and realizing just how much work I've done and how much effort it took for me to do what I've been able to do. I've been quite successful in many of my endeavours, and I'm proud of that, especially because I now realize what I was overcoming.

Are there still some challenges? Are there benefits?

The main challenge is that, as I said before, society is neurotypically centred, and if you move away from that centre, it can throw people off. So I think part of the challenge is still being able to be effective and heard—to be accepted or acceptable. Another challenge is that ADHD is considered a disorder, which is kind of a double-edged sword. It needs to be classified as a disorder so people can get the resources they need, but the word "disorder" can be a hard one to see past.

The benefits, though, are that I have an incredible amount of positive energy, some very unique perspectives, and the ability to survive some really difficult situations. I'm not going to say that I haven't hit some low points, but I've managed to be very resilient—not only for myself, but also for my two girls.

What would you most want people to know about neurodivergence?

There's still a misconception that ADHD is only diagnosed for hyperactive little kids, but I think perceptions are changing, particularly as this area of knowledge continues to expand. Still, I wish that people were more open to differences, including in professional environments. There's this idea that we'll be more effective and efficient if we all act the same way.

There's some truth to that, but I think we risk stifling creativity, imagination, and ingenuity when we try to fit everybody into the same box.

Also, it's important to not lump everybody with ADHD into one bucket. We all experience it and manage it differently.

Has being neurodivergent affected your career path?

Definitely, and in a positive way. I'm willing to see things from a different perspective, so I'm willing to approach things differently, and I think that has worked in my favour. But it took a lot of work to get to a place where I could be as effective as I am. And I think part of the reason for my success was not only that I knew how to get the system to work for me, but also that I was able to find people who appreciated who I was and how I presented.

Where I work now, I feel incredibly supported, which is a huge relief.

What can employers and other professionals do to provide the kind of support you've described?

I think it's important to create a culture where people feel safe to express an emotion or difference of opinion without being judged. People in the professional sphere often get stuck in their ways, because everybody's so busy and time-bounded, but embracing diversity means acknowledging that different people bring different strengths to the table.

Creating a supportive culture also makes people more productive. I know I'm incredibly productive when I feel I'm being supported—it sounds simple, but it's true.

Part of the challenge, I think, is that we're all taught that some behaviours are acceptable and some aren't. So, when faced with situations where people are behaving in ways we've always been told were unacceptable, we tend to want to shut them down. If, instead, we could be a little more introspective and ask ourselves if there's value in what the individual is actually saying, we might see that they have something to contribute. Maybe there's a particular point they're trying to make, but they're not articulating it effectively.



If, instead of feeling put off, we could take a step back and create space for them, we might uncover some incredible creativity and some genius ideas.

What would you say to someone who's worried about potentially being neurodivergent?

I'd say that you can still be successful. You can still live your life. You can still do what's important to you and be neurodivergent at the same time. Instead of seeing it as an obstacle, find a way to celebrate it as your superpower!!

Thank you for sharing your story with us, Martha. ■

Kerri Brkich is the vice-president of external affairs and communications at CPABC.

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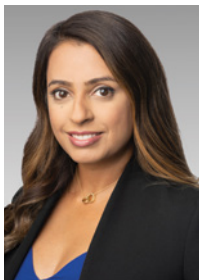
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Aliya Goldan is a partner in tax with Smythe in Vancouver, where she specializes in corporate and personal tax planning, including corporate reorganizations, for privately held businesses. Photo by Kent Kallberg Studios.

Practical Issues with the Residential Property Flipping Rules

By Aliya Goldan, CPA, CA



AndreyPopov/istock/Getty Images

The federal property flipping rules came into effect on January 1, 2023, to address the government's concerns about the rapid escalation of housing prices and speculative real estate activity. These rules were intended to create stability in the housing market and ensure that homes would be used for residential purposes rather than as short-term investments. The province of British Columbia subsequently introduced its own property flipping rules, effective January 1, 2025, to discourage the short-term holding of property for profit.

It's important to note that the taxes imposed under the BC rules are separate and distinct from those under the federal property flipping rules. For taxpayers and professional advisors, this means taking extra care when planning the disposition of property.

Overview of the federal and BC rules

The property flipping rules in Canada's *Income Tax Act* generally deem the gain from the disposition of a flipped property to be inventory and, therefore, tax it as business income rather than a capital gain. These rules apply to a housing unit (or the right to acquire a housing unit—i.e., a presale contract) located in Canada, where the taxpayer owns the property (or the right to acquire the property) for less than 365 consecutive days before its disposition.

There are specific exceptions to the federal rules that provide relief when certain life events occur; however, these exceptions do not apply to various tax planning transactions where a taxpayer owns property for less than the required 365 consecutive days but the disposition falls outside of the activities that were targeted by the government when the rules were introduced.

The rules introduced by the province of British Columbia are separately governed through the *Residential Property (Short-Term Holding) Profit Tax Act*. These rules generally apply a tax where a person (an individual, corporation, partnership, or trust) disposes of property for a profit on or after January 1, 2025, having purchased the property less than 730 days before the sale.

Taxable property for the purpose of the BC rules refers to a beneficial interest or a right to acquire a beneficial interest in residential property. The applicable tax rate is 20% of net taxable income (generally being the proceeds of the property's disposition, reduced by its cost and the cost of improvements) earned from a property sold within 365 days; the tax rate decreases over the next 365 days, with a full phaseout at the end of the 730-day holding period.

Similar to the federal rules, the BC rules provide exceptions for certain life events. Additionally, they provide exceptions for builders, developers, and building or renovation activity, as well as for certain related party transfers that are typical of various tax-planning transactions.

Practical implications

From a tax-planning perspective, real property (including housing units) is often transferred within a related group for reasons other than those targeted by the federal government when it introduced the property flipping rules. However, as the federal rules do not provide relief for related-party transactions and the BC rules only provide exceptions for certain related-party transfers, common tax-planning transactions may now result in certain property being considered “flipped property.”

This can be punitive where the purpose of undertaking the related-party transaction is not a true disposition for the purpose of profit.

Here's a deeper dive into the possible implications:

Amalgamations

Consider a scenario in British Columbia where Corporation A and Corporation B undertake an amalgamation to form a new entity: Corporation C. Before the amalgamation, Corporation A holds a housing unit purchased more than two years earlier. Less than 365 days after the amalgamation, Corporation C disposes of this housing unit.

Generally, for income tax purposes, Corporation C would be deemed to acquire the property of its predecessor corporations at an amount equal to their adjusted cost base immediately before the amalgamation. This means that Corporation C would assume Corporation A's housing unit at a cost equal to its adjusted cost base immediately before the amalgamation.

In BC, if a person acquires a property from a “related person,” the person is deemed to have acquired the property on the same date that the related person acquired the property. Further, where a new corporation is formed as a result of the amalgamation of two or more predecessor corporations, the new corporation is considered to be related to the predecessor corporations. Accordingly, in the aforementioned example, Corporation C would be deemed to have acquired the housing unit at the time it was acquired by Corporation A (i.e., more than two years before its disposition), and the BC property flipping rules should not apply to the sale. *However*, because the same related-party exception does not apply at the federal level, the federal property flipping rules would still need to be considered.



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During the CRA roundtable at the Canadian Tax Foundation's annual conference in 2024, it was noted that for the purpose of the federal property flipping rules, a new corporation is not deemed to be the same entity as, or a continuation of, its predecessor corporations.¹ Therefore, the 365-day clock would restart as a result of the amalgamation.

Using the aforementioned example, this means Corporation C would be deemed to have acquired the housing unit as a result of the amalgamation, and the federal property flipping rules *could* apply to its disposition of the property less than 365 days after that amalgamation. Consequently, any profit could be taxed as business income rather than a capital gain. This result would not be aligned with the intention of the government in implementing the federal property flipping rules and would be punitive to a corporation on the ultimate disposition, even though the property had been held by a predecessor corporation for the required holding period.

Related-party transfers

A similar mismatch between the BC and federal property flipping rules may occur on the transfer of property between related persons. Assume, for example, that:

- Individual A transferred property to Corporation B on a tax-deferred basis in exchange for shares of Corporation B;
- Individual A acquired the property five years prior to the transfer; and
- Corporation B disposes of the property less than 365 days after the transfer.

For the purposes of the BC property flipping rules, Corporation B would be deemed to have acquired the property at the time it was acquired by Individual A, so the ultimate disposition by Corporation B should not be subject to the BC property flipping rules. However, as the federal property flipping rules do not contain a continuity of ownership provision for cases where property is acquired from a related person, the federal property flipping rules *could* apply to Corporation B when it disposes of the property.

Life interest trusts

Now let's consider a very common tax-planning transaction involving a life interest trust. Let's say Individual A, who is over the age of 65, contributes a housing unit to an alter ego trust. Individual A held this property for more than 730 days before the date of contribution to the trust. Individual A is both the trustee of the trust and its sole beneficiary while they are living. The trust sells the housing unit less than 365 days after it acquires the property.

For the purposes of the BC property flipping rules, the legislation does not specify that a trustee of a trust is related to themselves. Accordingly, it is reasonable to assume that Individual A in this scenario, as trustee of the alter ego trust, is not related to themselves as an individual. As a result, the 730-day holding period would likely restart when the property is contributed to the trust, which means the subsequent disposition of the property by the trust could result in the application of the BC property flipping tax.

Similarly, the federal property flipping rules do not contain continuity provisions if a property is transferred by an individual to a life interest trust. Using the above example, the disposition of the housing unit by the trust within 365 days of the contribution date could result in the unit being considered flipped property. And, as an extremely punitive result, if the housing unit was considered a principal residence, the principal residence exemption would not apply, as the property would not be considered capital property of the individual.

Careful consideration needed

As they relate to common tax-planning transactions, the practical implications of the federal and BC property flipping provisions are significant. Taxpayers must give careful consideration to the holding period of properties and the specific circumstances surrounding their disposition when undertaking any tax plan that involves the transfer of or right to acquire a housing unit.

Understanding these rules can help to ensure that both professional advisors and taxpayers make informed decisions related to the holding and disposition of property. ■



AndreyPopov/Stock/Getty Images

¹ 2024-1037751C6: CTF Annual Conference, CRA Roundtable, Q. 12 – Property flipping rules and corporate property transfers, December 3, 2024. (taxinterpretations.com)



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PD EXPERTS

Breaking through Barriers: How to Get “Unstuck”

By Linda Lucas, CPA, CMA, ACC



Linda Lucas is the founding partner at Lead Vantage LLP. With more than 25 years of experience in finance, operations, and strategy, she coaches, mentors, and facilitates programs that empower participants and increase collaboration. For more insights, visit leadvantage.ca, where you'll find free articles on conflict resolution, leadership strategies, and change management. Photo by Michele Mateus Photography.

MORE FROM THE AUTHOR

Linda will be co-leading CPABC's Controller's Management Program in person in Victoria (June 4-7) and virtually (October 16-17). Attend this program to explore the theory, best practices, and tools to further sharpen your leadership and management skills. Visit pd.bccpa.ca for details.

In the dynamic world of business, encountering obstacles is inevitable. Whether you're taking on a new project, facing an organizational change, or tackling a persistent issue, the key to success is how effectively you navigate challenging situations and break through barriers.

One powerful approach is implementing an “unstuck” framework, which consists of three essential steps:

1. Assessing the status;
2. Bringing the right tools; and
3. Setting a relationship focus.

Let's delve deeper into each step and explore how to apply this framework to successfully break through any barriers.

Step 1: Assess the status of your unstuck framework

Identify the objective or outcome you want to achieve

The first step in applying the unstuck framework is defining what success actually means for you and your team. Take the time to ask your team meaningful questions to ensure that you end up addressing the right problem. Don't assume that you alone know the answer; practise active listening and engage in open dialogue to ensure the best results.

Consider who needs to be involved

There's no such thing as “over-communication” here. Identify who needs to be included in discussions, looped into communications, and invited to meetings. And don't just pay attention to early adopters—pay attention to those who are more resistant to change as well. By understanding where each team member stands, you can tailor your approach accordingly.

Embrace conflicts and build relationships

Conflict is natural, but *unresolved* conflicts can impede progress. Take the time to build relationships and understand your team members' various perspectives. Address conflicts openly and encourage dialogue that focuses on understanding rather than laying blame.

Step 2: Bring the right tools

Determine your team's current position

Gather data and conduct debriefs to understand your team's position (both as individuals and collectively) on the issue at hand and gain valuable insights on their concerns and perceptions.

Establish trust and psychological safety

Trust is the foundation of any successful team. Acknowledge past successes, highlight current issues, and emphasize the benefits of proposed solutions. Be empathetic and compassionate, understanding that change can be challenging for many.

The original version of this article was published in the CPABC Newsroom at bccpa.ca/newsroom on March 4, 2025.

Encourage healthy debate

Foster an environment where team members feel comfortable expressing their opinions, even when they run counter to the majority. Encourage reflective and empathetic listening and ask open-ended questions to de-escalate emotions.

Seek win-win solutions

Look for options that benefit everyone involved. Consider any missing pieces and be open to compromise.

Implement best practices

Use proven strategies for managing change, considering the “rider (rational), elephant (emotional), and path (environmental)” framework, described by brothers Chip and Dan Heath in their book *Switch: How to Change Things When Change Is Hard*. Directing the rider involves providing clear direction and goals; motivating the elephant appeals to people’s values, aspirations, and feelings; and shaping the path involves removing obstacles to change.

Commit to decisions

Ensure that decisions are followed and actions and behaviours align with these decisions.

Hold yourself and others accountable

Be willing to have difficult conversations and establish a clear code of conduct that holds everyone accountable. Building a culture of accountability will require leadership at every level—from self-leadership and team leadership to organizational leadership.

Set and measure goals

Define clear goals, break them into manageable steps, and celebrate milestones. Be mindful of your team’s capacity as you work through each phase. It can be helpful to integrate coaching conversations into this process.

**Step 3: Set a relationship focus
Determine your intentions**

Consider how you want your team to feel throughout the process. Adjust your behaviour to foster a positive, empathetic, and sincere atmosphere.

Adapt communication styles

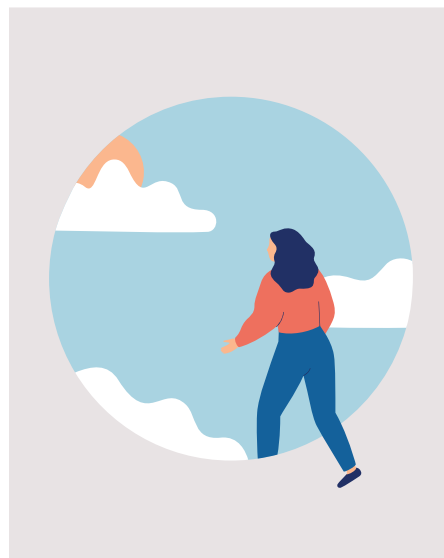
Understand your team’s communication preferences and tailor your approach accordingly. Ask them what they consider important and what they need from you.

Address leadership gaps

Reflect on your leadership style and identify areas for improvement. Pivot your behaviour to strengthen relationships within the team.

Keep your eye on the prize

Following this kind of framework will help you navigate challenges and break through barriers with confidence and with buy-in from your team. Remember, success is not just about reaching the destination but also about the journey and the relationships built along the way. So embrace the process, empower your team, and commit to overcoming obstacles together. ■



The logo for the CPABC Infinite Conference. It features the word "infinite" in a lowercase, sans-serif font. Above the letters "i", "n", and "f" is a circular graphic composed of small dots in blue and green, arranged in a pattern that suggests a continuous loop or infinity.

**CPABC Infinite
Conference**

**Limitless opportunities,
endless growth**

November 27-28, 2025 | Hybrid

Featuring inspiring speakers and sessions, this exciting two-day conference will give you the perfect opportunity to expand both your knowledge and your network. In-person offerings will be held at the Vancouver Convention Centre, and members who aren’t able to attend in person will be able to participate virtually. More conference details, including speakers, sessions, sponsors, and pricing, can be found at pd.bccpa.ca/conferences-series/infinite.

Save on registration!

There are several ways to save on your registration fee:

- Take advantage of early-bird discounts on cash registrations;
- If eligible, access our special discount for CPA candidates and for CPABC members who’ve earned the CPA designation in or after 2020; or
- Register using your PD Passport for individuals and groups from the same organization. See pd.bccpa.ca/pd-passports for more information.

PD PROGRAM HIGHLIGHTS

Live Webinars in Spring and Summer



Leadership in an Increasingly Polarized World | June 20

This course makes a strong case that changing stakeholder expectations, paired with the power of social media and increased societal polarization, have changed the game. Sharing a compelling real-life story from her time as CEO of the online ethical fashion marketing company The Garment Inc., the instructor will invite audiences to consider where “moral polarization” is showing up in their organizations and whether they’re well equipped to navigate it.

Working Better Together – Enhancing Team Collaboration, Connection, and Team Dynamics | July 16

This course will help you understand the importance of good team dynamics and healthy collaboration so you can build trust and create an environment for greater collaboration, connection, and productivity. It starts with seeing the problem clearly, minimizing the behaviours that erode trust and respect, and fostering the behaviours that create powerful teams.

Tools to Navigate and Thrive Through Growth and Change | August 6

This course will equip you with the tools needed to navigate adversity by demonstrating courage, flexibility, and positivity in the face of change. From everyday frustrations to major life events, you will learn how to manage stress and adapt more effectively to ultimately become a “change master” in both your personal and professional life.

Internet Security Tools for Accountants | August 20

With accountants being prime targets for cybercriminals due to their access to sensitive financial data, this course emphasizes practical security measures and tools that protect both firm and client interests. Through hands-on examples and case studies, participants will learn to identify, evaluate, and implement appropriate security solutions for their practice.

Redefining Leadership Certificate Program

This six-course certificate program is designed for middle and senior managers who want to become more perceptive and adaptive leaders in today’s volatile business environment. Each course, presented as a live webinar, aims to prepare participants for executive roles:

- **From Manager to Leader (August 5-7):** This course will examine what it means to be a good leader and what it takes to succeed in today’s increasingly complex, unpredictable, and hyper-competitive business environment.
- **Why Successful Companies Fail: Forewarned Is Forearmed (August 26):** This seminar will show you the warning signs that indicate things are going off track. It will also show you what to do when strategy fails and how to address the inflection points, course correct, and transition to a new operating model.
- **Understanding the Human Condition (October 23):** This seminar will assist you in better understanding the complexities of the human brain and explore how our cognition affects our personal and professional success.
- **Building Innovation Capability (October 28):** This course will show you how to effectively incubate, resource, manage, and sustain innovation.
- **Strategic Foresight, Planning, and Modelling (October 30):** In today’s rapidly changing and uncertain environment, developing strategic foresight is essential. This course will show you how to make confident decisions and seize opportunities when marketplace conditions unexpectedly change.
- **The Science of Fearless Decision-Making (December 16):** This seminar will show you how to make optimal decisions in an era of misinformation and data overload.

Note: To qualify for the certificate, you must register and complete all six required courses within two years of the date of your first enrolled course. You do not have to register for all six courses at the same time.

bgfoto/E+/Getty Images



Discount On-Demand Courses

Enjoy a 10% discount on all on-demand courses when you register this June! Don’t miss out on this limited time offer to enhance your skills and knowledge.



Online virtual offerings in July

Business and Leadership Insights | July 10

Join us for this one-day virtual event designed to help leaders navigate today’s complex world with confidence. Attendees will learn actionable steps and strategies to help them manage teams and lead through challenges. They’ll also explore new ideas with sessions on strategic and operational leadership, project management, physical and mental wellness, and much more.

Information Technology Insights 2025 | July 22-23

This PD Nexus Day is our touchstone conference-style event for those who want to thrive in the competitive business landscape. This year’s event will feature three streams of breakout sessions and four plenary sessions, all packed with valuable insights. As always, attendees will explore practical, actionable, and cutting-edge technology strategies to help them provide their clients with superior services. **Special feature:** You can attend either a single day or both days.



Early-Bird Pricing for PD Passports

Recognizing that CPAs are required to obtain a minimum number of CPD hours each year, CPABC offers a robust PD program of relevant high-quality courses and a PD Passport program to help you maximize your savings. Passport credits can be applied to any combination of two-hour, half-day, or one- or two-day CPABC PD seminars, including PD Nexus Days and this year’s Infinite Conference. PD passports will be available on the first Monday in May.

The 2025-2026 PD passports can be used for course dates between **September 1, 2025**, and **August 31, 2026**. **Note:** Early-bird pricing for 2025-2026 PD passports expires on **September 26, 2025**. Check out our complete loyalty program at pd.bccpa.ca and email us at pdreg@bccpa.ca with any questions.

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Regular price: \$975 + GST	Regular price: \$1,650 + GST	Regular price: \$2,050 + GST

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MEMBERS IN FOCUS

ANNOUNCEMENTS AND ACCOLADES

Kudos!

Avanti CPA in Kamloops (formerly Tenisci Piva) is pleased to announce the promotions of **Isla Adderson, CPA**, and **Amanda R. M. Taylor, CPA, CGA**, effective January 1, 2025. Isla was promoted to the firm's management team, and Amanda was promoted to its partnership.



Isla Adderson



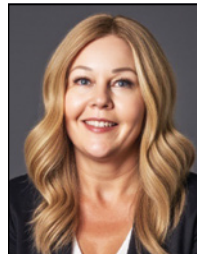
Amanda R. M. Taylor



Ben Campbell, CPA, CA, was recently appointed CEO of Northern Development Initiative Trust (NDIT) in Prince George, following a brief period as interim CEO. In his previous role as CFO, Ben was instrumental in growing NDIT's partner programs and implementing enhanced technology and security systems.



Gopi Chande, FCPA, FCA, has received a PEAK Award from the Association of Women in Finance in the "Excellence in Industry" category. As mentioned in the March/April issue and on page 7 of this issue, she also recently received an Influential Women in Business Award from *BIV*.



Kimberly Corea, CPA, was recently appointed CEO of Ecora Engineering & Environmental, where she also serves as CFO. Kimberly previously held various controllership roles after having worked for many years in public practice.



Erin Elliott, CPA, CA, was recently appointed CFO of Devon Properties, headquartered in Victoria. She previously served as the VP of accounting at Wesgroup Properties.

Two CPABC members awarded Coronation Medal

Neelam Sahota, FCPA, FCGA, ICD.D, the CEO of DIVERSEcity Community Resources Society, and **Kristine Simpson, FCPA, FCA**, a partner in assurance services at BDO Canada, have both been recognized with the King Charles III Coronation Medal in 2025. Launched by the Governor General of Canada, Mary Simon, this honour celebrates individuals who have made significant contributions to Canada. As mentioned in the March/April issue and on page 7 of this issue, Kristine also recently received an Influential Women in Business Award from *BIV*.



Neelam Sahota



Kristine Simpson



Have some news to share?

We'd love to hear from you.

Email us at infocusmag@bccpa.ca.



Strengthening Ties and Honing Skills

Celebrating Lunar New Year in style

In February, three CPABC chapters hosted events to celebrate Lunar New Year:

- The Richmond/South Delta Chapter hosted more than 30 CPAs and their guests on February 8. The event started with a challenging circuit training session that gave attendees the chance to have fun and burn calories before enjoying a dim sum feast at Continental Seafood Restaurant.
- More than 110 CPAs and their guests gathered at Grand Crystal Seafood Restaurant on February 8 for this annual event hosted by the Burnaby/New Westminster Chapter. After being greeted by **Peter Guo, CPA, CA**, CPABC's board chair, attendees enjoyed a 10-course meal and a performance by lion dancers. Also at the event was Maita Santiago, a councillor for the City of Burnaby, who provided a quick regional update from the council.
- On February 20, the Victoria/Southern Vancouver Island Chapter hosted 200 CPAs and their guests at Don Mee Seafood Restaurant to celebrate the Year of the Snake. **Peter Guo, CPA, CA**, CPABC's board chair, was on hand to speak about the importance of community support and initiatives like the Camosun CPA Award in Accounting for fostering the next generation of accounting professionals. Another highlight of the evening was the silent auction, which raised \$2,995 to help future accounting students achieve their educational goals.



Above: CPABC Board Chair Peter Guo, CPA, CA (centre), was joined by CPABC board members Regan McGrath, CPA, CA (front row, centre), Bernard Achampong, CPA, CMA (second row, centre), and Sandy Stedman, FCPA, FCA (front row, second from right), at the Victoria/Southern Vancouver Island Chapter event.



hua wu/Stock/Getty Images

Providing opportunities for learning

CPABC chapter events offer an excellent way to continue to develop professionally. Since the spring of 2024, our chapters have hosted seven educational events—along with many other offerings—two of which took place in February 2025:

- On February 1, the Vancouver Chapter hosted “The Goal Getter’s Game Plan,” led by mortgage broker **Matthew Chan, CPA, CA**, who described how insights from behavioural science can inform goal-setting strategies. Through engaging and interactive discussions, attendees explored powerful techniques to set and achieve both personal and professional goals.
- On February 6, the Victoria/Southern Vancouver Island Chapter hosted its first learning event, entitled “Negotiation in Action: Plan and Win,” led by educator and consultant **Mia Maki, FCPA, FCMA**, leader of the Controller’s Operational Skills Program for CPABC’s PD Program. In addition to gaining strategies to help them negotiate with confidence, attendees had the chance to connect with peers during a networking lunch.



Left: Matthew Chan, CPA, CA, offers Vancouver Chapter members strategies for setting and achieving goals. Below: Mia Maki, FCPA, FCMA, shares tips on negotiating with confidence.



More learning events are in the works. To learn about events in your area, visit bccpa.ca/chapter-events.

MEMBER RECOGNITION

Celebrating Achievement at CPABC's Gala Events



CPABC's 2024 honourees. Standing (l to r): Archie Campbell, FCPA, FCA; Paul Townsend, FCPA, FCA; Mikaela Taylor, FCPA, FCA; Tahir Ayub, FCPA, FCA; Kyla Magee, CPA (Early Achievement Award); Derek Cockburn, FCPA, FCGA; Nelson Soh, CPA, CA (Early Achievement Award); George Jecminek, CPA (Early Achievement Award); Bruce Sprague, FCPA, FCA, CPA (Illinois); Frederick (Fred) Wong, CPA (Early Achievement Award); Shane King, FCPA, FCA; Kay Wong-Alafriz, FCPA, FCA; Brendan L'Heureux, CPA, CA (Distinguished Service Award); Matthew (Matt) Stam, CPA (Early Achievement Award); and Daneal (Dan) Little, FCPA, FCA (Lifetime Achievement Award). Seated (l to r): William (Bill) Davidson, FCPA, FCA (Lifetime Achievement Award); Joanne YH Liu, CPA, CGA (Distinguished Service Award); Beverley (Bev) Briscoe, FCPA, FCA (Lifetime Achievement Award); Amy Bonner, CPA, CA (Distinguished Service Award); Tannie Lam, CPA, CA (Early Achievement Award); and Justin Brogan, CPA (Early Achievement Award). Not in attendance: Kaleb St. Pierre, CPA, CA (Early Achievement Award); and Shelley Gilberg, FCPA, FCMA. Photo by Kent Kallberg Studios.

FCPA Dinner

CPABC held its annual FCPA Dinner at the Vancouver Club on February 25 to honour the nine members who were elected to Fellowship in 2024 and the three outstanding Fellows who received the Lifetime Achievement Award. Approximately 100 people attended the event to help celebrate these remarkable individuals. The engaging evening also gave members of the FCPA community a chance to catch-up with peers and recognize the contributions of all FCPAs to the accounting profession, the business sector, and the broader community.

Member Recognition Dinner

On April 2, a celebratory crowd of approximately 207 gathered at the Fairmont Waterfront Hotel for CPABC's Member Recognition Dinner, where 23 exceptional CPAs were recognized for achievement (see their profiles on pages 16-31). Among the attendees were the honourees' family members, colleagues, and friends, as well as special guests representing CPABC's Board of Directors, Executive Management Committee, and two member recognition committees.

Congratulations to all of the honourees. The profession is very proud to celebrate you!



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1. Early Achievement Award recipient Fred Wong, CPA, with partner Lexia Bao. 2. Distinguished Service Award winner Amy Bonnar, CPA, CA, with parents Tom and Kathy Bonnar. 3. Lifetime Achievement Award winner Bill Davidson, FCPA, FCA, with wife Candice Davidson. 4. Early Achievement Award winner George Jecminek, CPA, with wife Alison Jecminek. 5. Shane King, FCPA, FCA (centre), receives his Fellowship certificate from CPABC President & CEO Lori Mathison, FCPA, FCGA, LLB, and CPABC Board Chair Peter Guo, CPA, CA. 6. Distinguished Service Award winner Joanne YH Liu, CPA, CGA, with Stanley Chang, FCPA, FCGA. 7. Lifetime Achievement Award winner Bev Briscoe, FCPA, FCA, with husband Art Vertlieb. 8. Derek Cockburn, FCPA, FCGA, with wife Rita Lord. 9. Lori Mathison and Peter Guo congratulate Early Achievement Award winner Tannie Lam, CPA, CA (centre). 10. Tahir Ayub, FCPA, FCA, with his family. 11. Lifetime Achievement Award winner Dan Little, FCPA, FCA, with his family. All photos by Kent Kallberg Studios.



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\$465,000 - Hybrid Accounting Firm for Sale in Vernon

Listing ID: BC2031

This hybrid firm provides full-cycle accounting services, including bookkeeping, payroll, corporate year-end preparation, and corporate and personal tax filings. With owner hours at just 1,500 per year, the current owner primarily works remotely. Less than 30% of clients meet in person. The firm has great staff!

Inquire at poegroupadvisors.com/practice/bc2031.

\$550,000 - Hybrid Outsourced Finance Firm for Sale in Vernon

Listing ID: BC2032

This hybrid accounting firm specializes in outsourced finance, bookkeeping, payroll, GST, PST, WorkSafeBC, and accounting compliance for non-profits—all without providing tax services. With a steady client base and reliable income, the firm has achieved consistent 18-20% annual revenue growth. This firm offers a scalable business model with owner hours under 1,600 per year!

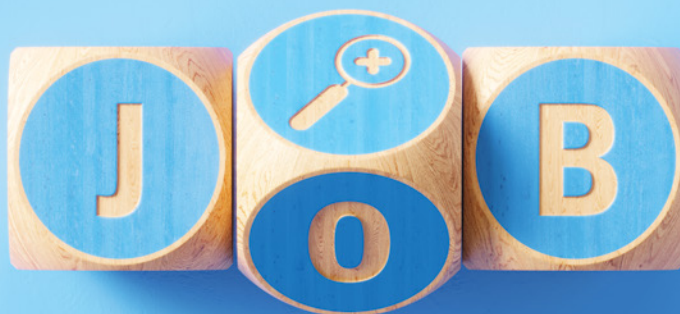
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Partnership Opportunity in North Okanagan

Long-established North Okanagan CPA firm is seeking a manager (or senior accountant with equivalent experience) who is interested in a career in public practice with potential for advancement to partnership within 1-3 years. Salary and benefits commensurate with experience.

Reply in confidence to:

northokcpa@gmail.com.



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.



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SNAPSHOT:

Shamus Molloy, CPA

The job: Manager at MNP in Nanaimo.

What he does: “I split my time between the assurance innovation and methodology teams, with a primary focus on AI tools.”

Why he loves it: “It’s amazing—I don’t think there’s anything I do at work right now that isn’t impactful or exciting.”

Operating system: “I’ve always been someone who likes to challenge the status quo. I like to ask, ‘Can we do it better?’ It means looking at different ways of doing things and seeking other perspectives.”

How his time in the Armed Forces informs his work today: “I’m driven and determined to get the job done, whatever it takes. It carries over into making sure that the team succeeds.”

Off the clock: “I have two little kids, so after work I’m hanging out with them. Other than that, I’m up early every morning to go to the gym. It sets the tone for the day by getting my energy level up.”

Best bit of advice: “Don’t be afraid to take a leap. If there’s a different career path you want to take, go for it. Taking a leap has always led to significant improvements in my life, and the big changes that I’ve feared have often been the most rewarding.”

Learn more about Shamus at bccpa.ca/newsroom.



Bobo Zhao Photography



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