

# CPABC Financial Literacy Program

## Registering as a Financial Literacy Volunteer and Navigating the Volunteer Portal

**Fall/Winter 2024**

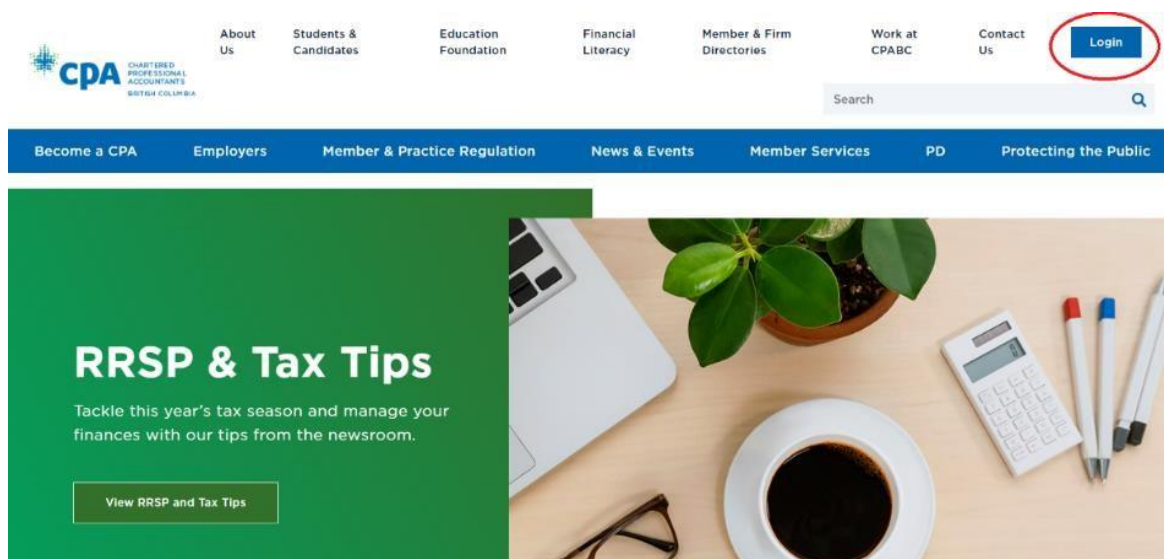
For more information or if you have questions, please  
email [finlit@bccpa.ca](mailto:finlit@bccpa.ca)

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## Registering as a Financial Literacy volunteer with CPABC

1. To register as a Financial Literacy program volunteer with Chartered Professional Accountants British Columbia, first click the “Login” button located at the top right of the CPABC website homepage.



2. On the login page, enter your Username (CPA ID) and password, then click “Sign In”.
3. Click “Financial Literacy”, located on the blue options bar.

[CPABC Home](#) [Contact Us](#) [Directory](#) [Mike Arteaga](#) [Cart](#) [Sign out](#)

[Profile](#) [CPD Reporting](#) [Fees, Receipts & Donation](#) [Professional Development](#) [Public Practice](#) [Other Services](#)

[Financial Literacy](#)

[Home](#) » [Profile](#) On behalf of: [\(select\)](#)

### Profile Information

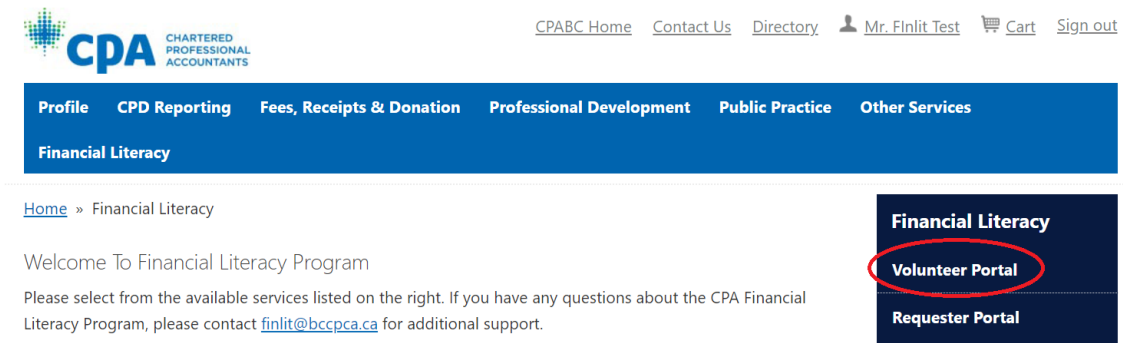
The following information reflects the most current data that CPABC has recorded in our system. If the information is incorrect, you can update it by clicking the 'pencil icon' in the upper right corner of the member details panel. Some fields require the assistance of a CPABC staff member in order to update them. If a field that you are attempting to update is disabled, you will need to contact CPABC for assistance.

CPA Number		Salutation	
Name	Mike Arteaga	Preferred First Name	Mike
Preferred Email	marteaga@bccpa.ca	Alternate Email	
Preferred Mailing Address	Employment Address	Cell Phone Number	

[Profile](#)

- [Profile Information](#)
- [Home Address](#)
- [Employment Information](#)
- [Communication Preferences](#)
- [Chapter Information](#)
- [Member Directory Settings](#)
- [Request Name Change](#)

4. On the right side of your screen, click on the “Volunteer Portal” tab under Financial Literacy.



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Profile CPD Reporting Fees, Receipts & Donation Professional Development Public Practice Other Services

Financial Literacy

Home » Financial Literacy

Welcome To Financial Literacy Program

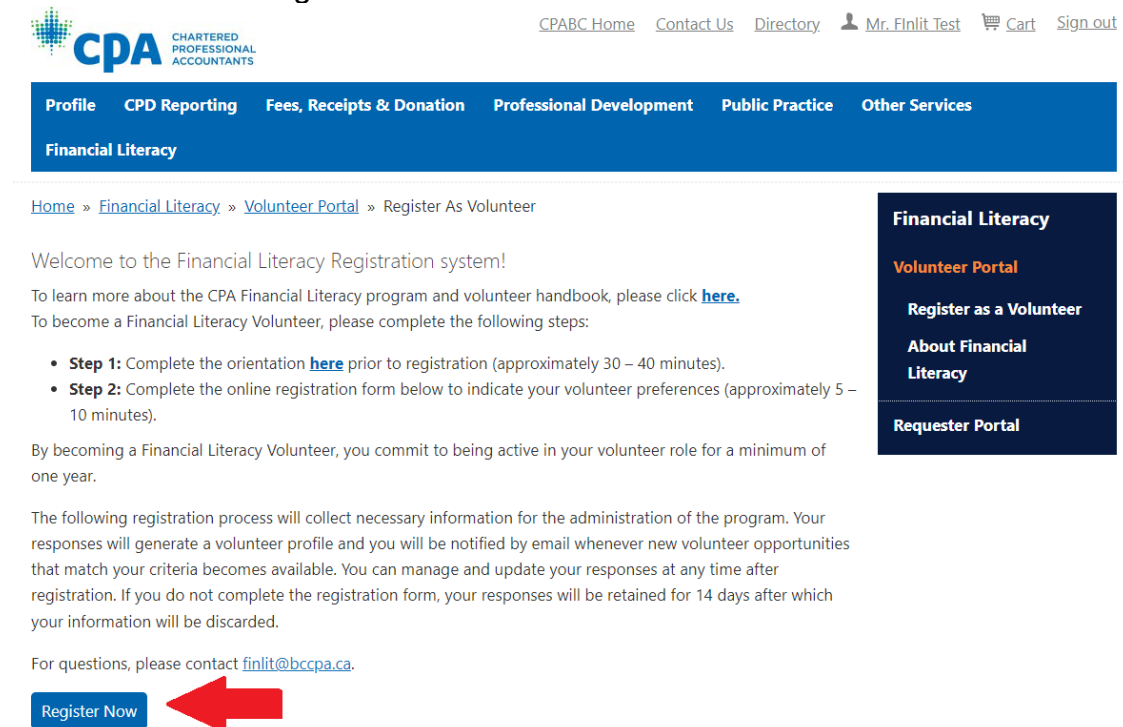
Please select from the available services listed on the right. If you have any questions about the CPA Financial Literacy Program, please contact [finlit@bccpa.ca](mailto:finlit@bccpa.ca) for additional support.

Financial Literacy

**Volunteer Portal**

Requester Portal

5. Click the blue “Register now” button.



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Financial Literacy

Home » Financial Literacy » Volunteer Portal » Register As Volunteer

Welcome to the Financial Literacy Registration system!

To learn more about the CPA Financial Literacy program and volunteer handbook, please click [here](#).

To become a Financial Literacy Volunteer, please complete the following steps:

- **Step 1:** Complete the orientation [here](#) prior to registration (approximately 30 – 40 minutes).
- **Step 2:** Complete the online registration form below to indicate your volunteer preferences (approximately 5 – 10 minutes).

By becoming a Financial Literacy Volunteer, you commit to being active in your volunteer role for a minimum of one year.

The following registration process will collect necessary information for the administration of the program. Your responses will generate a volunteer profile and you will be notified by email whenever new volunteer opportunities that match your criteria becomes available. You can manage and update your responses at any time after registration. If you do not complete the registration form, your responses will be retained for 14 days after which your information will be discarded.

For questions, please contact [finlit@bccpa.ca](mailto:finlit@bccpa.ca).

Register Now

6. Acknowledge that you've watched the orientation video, then enter all required information.
7. Select your volunteer preferences including preferred audience groups, format, locations, and languages. Setting these preferences enables you to be more accurately matched with available volunteer opportunities, and they can be changed at any time.
8. After you have selected your preferences, review your choices and agree to the waiver, then click the green "Finish" button. You will receive a registration confirmation email from CPABC (**note that it will take up to 24 hours for your volunteer registration to be fully processed**).

### Accessing and downloading session material

1. Once registered as a CPABC Financial Literacy volunteer, click on the "Access Session Material" tab on the right. This will take you to the CPABC Financial Literacy main page.



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[Profile](#) [CPD Reporting](#) [Fees, Receipts & Donation](#) [Professional Development](#) [Public Practice](#) [Other Services](#)

**Financial Literacy**

[Home](#) » [Financial Literacy](#) » [Volunteer Portal](#) » Register As Volunteer

On behalf of: (select)

#### Volunteer Preference

Based on the information provided you will be notified by email alerts whenever new volunteer opportunities that match your criteria becomes available. In addition, we might send you other possible opportunities that are similar, but not exact match, to the criteria in your profile. This will allow us to offer you as many potentially suitable volunteer opportunities as possible.

Depending on your selection, your opportunities may be limited. If you are unsure at this time, we recommend broadening your selection criteria by choosing more than one audience group and location. After your registration, you can also login to the Financial Literacy Online Services Portal to view all opportunities available.

#### **You can manage and update your responses at any time after registration.**

The CPABC Financial Literacy team is committed to finding you opportunities and will be actively monitoring your matching preferences.

Our [program catalogue](#) contains outlines and overviews for sessions in each audience group.

Please select your preferred Financial Literacy audience group(s):

#### Financial Literacy

##### Volunteer Portal

[Register as a Volunteer](#)

[Manage Volunteer Profile](#)

[Access Session Material](#)

[Withdraw from Financial Literacy Program](#)

[Volunteer Orientation](#)

[About Financial Literacy](#)

[Self Report a Session](#)

2. Use the search function to find the specific session you'll be presenting. You can filter by audience type and session level, or you can search for a session using keywords.

CPA FINANCIAL LITERACY PROGRAM / FINANCIAL LITERACY SESSIONS

## Financial Literacy Sessions

The CPA Financial Literacy Program delivers free, unbiased and objective financial education to British Columbians and Yukoners of all ages. Explore our 54 free financial literacy sessions and request one or more for your community today!

Questions? For further information, contact our Financial Literacy team at [finlit@bccpa.ca](mailto:finlit@bccpa.ca) | 604-484-7006

Audience ▾

Session Levels ▾


Search for keywords

Search


Clear Search

Sort by: Alpha ▾

**A healthy balance sheet and why it matters**  
Understand the concept of a healthy balance sheet and learn how to create one.  
  
INTERMEDIATE SMALL AND MEDIUM BUSINESSES



**Advanced financial statements**  
Learn about more complex concepts of financial statements such as accrued payables, work in process and non-operating income.  
  
SMALL AND MEDIUM BUSINESSES



3. Find and click on the session you'll be presenting. This will take you to that session's page.
4. On the right side, click the "Download Session Materials (CPAs Only)" button.

- develop effective strategies to minimize the amount of tax paid
- understand basic tax law
- understand the three main categories for tax planning:
  - reducing income subject to tax
  - maximizing deductions
  - using all allowable tax credits
- learn simple tips and tools to save money

### Session Outline

- understand tax laws
- tax planning
- keep detailed records
- how to achieve tax goals
- reduce taxable income
- tax deductions versus tax credits
- increase deductions
- use tax credits
- resources
- Q&A

### Learning Materials

- *Document Organizer Worksheet* — organizer and tracker of all documents needs for taxes
- *Tax Rate tables* — tax rates by province
- *CPA Canada's Personal Tax Planner Guide* — comprehensive resource for tax planning

SESSION LEVEL

Basic

TOPICS COVERED

Tax  
Financial Planning  
Managing Finances  
Personal Finances  
Credit

WHO SHOULD ATTEND

Adults, workplace

REQUEST THIS SESSION

DOWNLOAD SESSION MATERIALS  
(CPAs ONLY)

5. Here you'll see another "Download Session Material" button, click it to download a zip file containing all the materials needed to present the session.

[Home](#) » [Financial Literacy](#)

## Effective tax strategies

**Audience Type:** Adults




[Back to session overview and details](#)

To access the session material (facilitator curriculum) click the button below for the PPT presentation, worksheets and handouts. Not all sessions will have worksheets.



<b>Download Session Material</b> Material Last Updated: Oct 25, 2020	<b>Report Session</b> Already delivered?
-------------------------------------------------------------------------	---------------------------------------------

6. Open the zip file. Here you'll find three folders: Facilitator Materials, Participant Handouts, and Additional Materials.

 1_Facilitator's Materials	File folder
 2_Participant Handouts	File folder
 3_Additional Materials	File folder

7. The Facilitator Materials folder will contain all necessary materials for presenting the session including PowerPoint presentations, lesson plans, event checklist, facilitator's guide, and more.
8. The Participant Handouts folder contains materials for the session that are given out by the host organization. Please review these materials and ensure that the host organization has them.
9. The Additional Materials folder contains extra materials that can be helpful in presenting the session, such as news and media release templates, session flyers and invitations, and more.

10. On the same page where you downloaded the session materials, you'll find a YouTube video (if available) of a typical presentation for your selected session. Watch this to get an idea of how the session is generally presented.



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[Financial Literacy](#)

## A healthy balance sheet and why it matters

On behalf of: [\(select\)](#)

**Audience Type:** Small & Medium Business

[Back to session overview and details](#)

To access the session material (facilitator curriculum) click the button below for the PPT presentation, worksheets and handouts. Not all sessions will have worksheets.

[Download Session Material](#)

[Report Session](#)

Material Last Updated: Jan 5, 2023

Already delivered?

**Additional Session Resources for Facilitators (optional):**



## Self-reporting a session

1. If you organize a financial literacy session on your own outside of the CPABC volunteer portal, please **self-report** that session. By self-reporting, you are informing CPABC Financial Literacy that the session is taking place. Self-reporting is important in CPABC's goal to capture ALL data regarding financial literacy sessions.

Self-reporting is a quick and easy process. **We ask that you self-report each session you've organized on your own individually.**



2. To self-report a session, click the “Self-Report a Session” tab under “Volunteer Portal”.

The screenshot shows the CPA Chartered Professional Accountants website. At the top, there is a navigation bar with links: CPABC Home, Contact Us, Directory, Mike Arteaga, Cart, and Sign out. Below this is a blue header with tabs: Profile, CPD Reporting, Fees, Receipts & Donation, Professional Development, Public Practice, and Other Services. A sub-header for Financial Literacy is also present. The main content area shows the path: Home » Financial Literacy » Volunteer Portal » Register As Volunteer. On the right, there is a sidebar titled "Financial Literacy" with a "Volunteer Portal" section containing links: Register as a Volunteer, Manage Volunteer Profile, Access Session Material, Withdraw from Financial Literacy Program, Volunteer Orientation, About Financial Literacy, Self Report a Session (highlighted with a red circle), Available Volunteer Opportunities, and My Presented Sessions. The main content area is titled "Volunteer Preference" and contains text explaining the registration process, including email alerts and the ability to manage responses. It also includes a section for selecting preferred Financial Literacy audience group(s) with a dropdown menu showing "Audience groups" and options: "Check all", "Adults" (selected), and "Elementary School".

3. Fill in all necessary information and then click the “Submit Request” button at the bottom of the page to finish self-reporting the session.

### **Changing volunteer preferences**

1. When in the Volunteer Portal, you can navigate to the Volunteer Preferences tab by clicking the green “Next” button on the bottom of the page, then select your new choices and click the green “Finish” button at the bottom of the page. This will save your updated volunteer preferences.

## Searching for available volunteer opportunities

1. Under “Volunteer Portal” click the “Available Volunteer Opportunities” tab.

The screenshot shows the CPA BC website's Financial Literacy section. At the top, there's a navigation bar with links like Profile, CPD Reporting, Fees, Receipts & Donation, Professional Development, Public Practice, and Other Services. Below this is a breadcrumb trail: Home » Financial Literacy » Volunteer Portal » Register As Volunteer. The main content area is titled "Volunteer Preference" and contains text explaining that users will receive email alerts for new opportunities. It also mentions that selection criteria can be broadened. A section titled "You can manage and update your responses at any time after registration." states that the CPABC Financial Literacy team is committed to finding opportunities. Below this, a link to the "program catalogue" is provided. The main task is to "Please select your preferred Financial Literacy audience group(s):". A dropdown menu for "Audience groups" is shown with options: Check all, Adults (selected), Elementary School, and Entrepreneurs. On the right side, there's a dark blue sidebar menu for "Financial Literacy" with various options. The "Available Volunteer Opportunities" option is circled in red.

CPA BC CHARTERED PROFESSIONAL ACCOUNTANTS

CPABC Home Contact Us Directory Mike Arteaga Cart Sign out

Profile CPD Reporting Fees, Receipts & Donation Professional Development Public Practice Other Services

Financial Literacy

Home » Financial Literacy » Volunteer Portal » Register As Volunteer

On behalf of: (select)

**Volunteer Preference**

Based on the information provided you will be notified by email alerts whenever new volunteer opportunities that match your criteria becomes available. In addition, we might send you other possible opportunities that are similar, but not exact match, to the criteria in your profile. This will allow us to offer you as many potentially suitable volunteer opportunities as possible.

Depending on your selection, your opportunities may be limited. If you are unsure at this time, we recommend broadening your selection criteria by choosing more than one audience group and location. After your registration, you can also login to the Financial Literacy Online Services Portal to view all opportunities available.

**You can manage and update your responses at any time after registration.**

The CPABC Financial Literacy team is committed to finding you opportunities and will be actively monitoring your matching preferences.

Our [program catalogue](#) contains outlines and overviews for sessions in each audience group.

Please select your preferred Financial Literacy audience group(s):

\*Audience groups

- ☐ Check all
- ☒ Adults
- ☐ Elementary School
- ☐ Entrepreneurs

**Financial Literacy**

- Volunteer Portal**
- Register as a Volunteer
- Manage Volunteer Profile
- Access Session Material
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- Volunteer Orientation
- About Financial Literacy
- Self Report a Session
- Available Volunteer Opportunities**
- My Presented Sessions
- Requester Portal

2. Search for available opportunities by selecting delivery format, city, preferred language, and preferred audience.
3. Click the “Search” button to view any available opportunities that match your search criteria.
4. Note that you will receive two emails per month informing you of upcoming volunteer opportunities that fit your preferences.

## Viewing your presented sessions

1. Under “Volunteer Portal” click the “My Presented Sessions” tab.

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**CPA** CHARTERED PROFESSIONAL ACCOUNTANTS

[CPABC Home](#) [Contact Us](#) [Directory](#) [Mike Arteaga](#) [Cart](#) [Sign out](#)

**Profile** **CPD Reporting** **Fees, Receipts & Donation** **Professional Development** **Public Practice** **Other Services**

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**\*Audience groups**

- ☐ Check all
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- ☐ Elementary School
- ☐ Entrepreneur

**Financial Literacy**

- Volunteer Portal**
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- Self Report a Session**
- Available Volunteer Opportunities**
- My Presented Sessions**
- Requester Portal**

2. Navigate the three tabs to view your upcoming, past, and cancelled Financial Literacy sessions.

**For more information or if you have questions,  
please email [finlit@bccpa.ca](mailto:finlit@bccpa.ca)**