

Winter 2022

capitalize

Introducing Albertans to the CPA Profession

LEVEL UP WITH THE CPA DESIGNATION

ROLE
CHARTERED PROFESSIONAL
ACCOUNTANT



SKILLS

ADAPTABILITY



CREATIVITY



DRIVE



PROFESSIONALISM



STRATEGIC THINKING



START >

Hayat Kirameddine CPA, CA





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- Becoming grandparents

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*Danielle Wong CPA, CA
helps bust common
auditing myths*

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Visit capitalize.cpaalberta.ca for even more *Capitalize*!

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Message from Rachel Miller, CEO, CPA Alberta



Dear Alberta students:

Welcome back to campus for the winter 2022 semester! You're in the last half of the school year, and I wish you all the best for a productive and successful semester.

The cover story for this issue of *Capitalize*, titled "Levelling up with the CPA designation," features Alberta Chartered Professional Accountants (CPAs) sharing how the CPA designation levelled up their careers to new heights and areas.

As it turns out, getting your CPA designation is not unlike playing a video game. In video games, you slowly gain experience points (XP) in order to get stronger, you accumulate skills and tools that help you take on progressively harder battles, and the game culminates in the final boss that you have to overcome in order to succeed. In the CPA Certification Program, the XP is the practical experience component, which enables you to gain the breadth and depth of competencies expected of a CPA; the tools you gain include skills such as leadership, collaboration, and business acumen; and the "final big boss" is the Common Final Examination (CFE) that tests whether you have the comprehensive knowledge and educational competencies.

I know from experience that passing the CFE "final boss" is immensely satisfying and makes you feel like every minute and hour spent gaining that experience was well worth it. The difference is that when you get your CPA designation, the "game" doesn't end. In fact, the real game only truly begins at that point, and armed with the designation and the valuable skills gained during your CPA education and training, you're now perfectly equipped to take on any quest or new adventure you want to go on.

For the more than 30,000 CPAs in Alberta, their quest has taken them to numerous industries and organizations around the province and the world. They've used their skills to make meaningful change in their communities and to the causes that are important to them. From non-profits to industry, public practice to government, Alberta CPAs never stop levelling up their careers to be some of the most successful and influential people in businesses everywhere.

But don't take my word for it: keep reading to get to know some amazing Alberta CPAs and see how they've used their designation to keep reaching for new opportunities and challenges.

I hope the remainder of the 2021/2022 school year is a great one and that you and your loved ones continue to stay healthy and safe.

Rachel Miller FCPA, FCA
CEO, CPA Alberta

LAND ACKNOWLEDGMENT

CPA Alberta and *Capitalize* acknowledge the land we call Alberta is the traditional and ancestral territory of many Indigenous peoples. We are grateful for their stewardship of this land, and their histories and culture influence our community to this day.

Spanning generations, acknowledgment of the land is a traditional custom of Indigenous peoples. In the spirit of reconciliation and building respectful relationships, we recognize our offices are situated on the following traditional territories:

Amiskwaciwâskahikan, or Edmonton, is situated on Indigenous land in Treaty 6 territory. We acknowledge the language, culture, and heritage of the Nêhiyawak (Cree), Anishinaabe (Saulteaux), Niitsitapi (Blackfoot), Métis, Dene, and Nakota Sioux people.

Moh'kins'tis, or Calgary, is situated on Indigenous land in Treaty 7 territory. We acknowledge the language, culture, and heritage of the Blackfoot Confederacy (Siksika, Kainai, and Piikani First Nations), the Stoney Nakoda First Nations (Chiniki, Bearspaw, and Wesley First Nations), Tsuut'ina, Îyâxe Nakoda Nations, and the Métis Nation Region 3.

We make this acknowledgment as an act of reconciliation and gratitude to those whose territory we reside on. CPA Alberta is committed to building a profession where Indigenous peoples and their voices and experiences are heard, valued, respected, and celebrated.



CPA EVENTS

events CALENDAR*

CPA Alberta Events

CPA Education Foundation Business Challenge Case Competition

March 2-4

The CPA Education Foundation Business Challenge is an intense case competition between students from post-secondary institutions across Alberta. It provides an opportunity for students to experience what it's like to be a professional solving real-world business problems.



Future Professionals Conference

POSTPONED to fall 2022

Join us for the second annual CPA Education Foundation Future Professionals Conference and get great returns on investing in YOU! This conference, designed for future business leaders, will give you the skills and mindset necessary for success in the future workforce. You will hear from and meet CPAs working in many different roles and sectors, be inspired by engaging speakers, and have a chance to network with fellow students.

Dynamic and passionate students like you will drive the accounting profession, the business community, and our society into the future. Take the first steps to becoming the professional you want to be.

This event will take place in fall 2022, with a date to be determined. Stay tuned for more details!

CAREER FAIRS AND OPEN HOUSES

CPA SPONSORSHIP

From career fairs to sponsorships to information and networking sessions, below is a comprehensive list of upcoming events you should know about!

CPA Alberta Sponsored Events

CPA Alberta partners with post-secondary institutions across Alberta to sponsor events throughout the year. Find an event on your campus to network with fellow students, CPAs, and CPA Alberta staff.

February

Feb 4: Case Workshop

Bissett Accounting Students Society,
Mount Royal University

Feb 18: Gala

Women in Business, University of Alberta

Feb 21-25: Rocky Mountain Business Seminar

University of Alberta

Case Competition**

Business Technology Management Club,
University of Alberta

Speed Networking**

Women in Business, University of Calgary

High School Case Competition**

NXT-GEN, University of Alberta

March

Mar 1: Women in Finance Panel

Women in Business, University of Calgary

Mar 25: Year-End Gala

Women in Business, University of Calgary

CPA Networking Dinner**

Bissett Accounting Students Society,
Mount Royal University

CPA Round Tables**

Accounting Students' Association,
University of Calgary

Global Industry Night**

International Business Students' Association,
University of Calgary

Volunteer Tax Clinics**

Accounting Club, University of Lethbridge;
MacEwan University Accounting Club; and
University of Alberta Accounting Club

Week of Giving**

Commerce Undergraduate Society,
University of Calgary

Wellness Colouring Night**

Haskayne Students' Association, University of Calgary

April

Year-End Gala**

Dhillon Business Students' Association,
University of Lethbridge

TBD

Industry Meet and Mingle**

Dhillon School of Business Calgary Students' Association,
University of Lethbridge



These are just a few of the events coming up, so be sure to check capitalize.cpaalberta.ca regularly for updates!

*Events and their format are subject to change based on current public health guidelines at that time.

**Event date(s) TBD.



ACCOUNTING IN THE CLOUD

By Kate Austin | Photography by HarderLee Photography

Joel Leclerc shares what it means to run a cloud-based accounting firm

AS MORE AND MORE of what we do becomes cloud-based, it should come as no surprise that the accounting profession is following suit. Although cloud-based accounting is still in its infancy, people like **Joel Leclerc CPA, CGA**, founder of Accounting for Humans, are paving a path for it to take off.

Joel's practice wasn't always cloud-based, however. He only made the transition in early 2020. "I think I've been trying to get there for a long time but never really saw a clear path into it," he says. "I wanted to be sure I could make it work before diving in."

After chatting with someone who already had an established cloud-based practice and bouncing ideas around with them, Joel decided to take the plunge himself. Moving to cloud accounting has opened the door for Joel to work with small businesses and young entrepreneurs who prefer a more modern and tech-forward approach, which are the kinds of clients he always wanted to work with.

"I think cloud accounting really empowers us to become small business specialists," says Joel. "It can have the

greatest impact for small businesses and can augment their finance capabilities in a budget-friendly way."

Cloud accounting has made it easier for Joel to serve his clients, since current software and technology have automated many of the mechanical and time-consuming tasks associated with traditional accounting. "I have more time to focus on how I'm supporting the business journey of my clients," he says.

And, of course, Joel's clients benefit, too. Instead of worrying about getting everything to their CPA at the end of each month, quarter, or year, cloud-based accounting makes it easy for clients to submit their documents as they have them. It can be as simple as forwarding emailed invoices and bills or capturing receipts with a dedicated phone app.

"What I'm hoping is that the client doesn't have to spend as much time chasing paperwork," says Joel. "I think you can reduce the mental tax many business owners experience by introducing the right technology. You collaborate with them to create a system that works with their schedule."



For anyone looking to get into cloud accounting, Joel has some advice: “Find someone who’s already doing it. There are a lot of technology choices to make, and it helps to tap into the knowledge of someone a little further down the path.”

In the future, Joel hopes to be that “someone who’s already doing it” for others, and he’d like to take it a step further.

“I would like to create a resource hub for upcoming cloud-based accountants. I think that’s the thing that stands out in the programming world. There’s a lot of open source and open sharing,” says Joel. “There are a lot of people that want to contribute to that. I think more than anything, it’s just that there isn’t a place for it.” 



What I’m hoping is that the client doesn’t have to spend as much time chasing paperwork. I think you can reduce the mental tax many business owners experience by introducing the right technology.

Joel Leclerc CPA, CGA



HEART-DRIVEN WORK

By Sharon Ruyter
Photography by HarderLee Photography and KTB Photography

**The value of being a CPA
in the non-profit sector**



Once I started working in non-profits, I realized there was more room to grow and an opportunity to implement new systems and improve things.

Biraj Patel CPA, CMA



THERE ARE CERTAIN SECTORS that make all the headlines for being future-focused, innovative, and cutting edge. But those headlines often unfairly leave out one sector from the conversation: non-profits, which have shifted, evolved, and continued to respond to community needs in all environments.

When **Biraj Patel CPA, CMA** first immigrated to Canada from India by way of the UK, he stuck to industries he was familiar with—manufacturing and oil and gas. An unexpected job change over to an organization that supports people with disabilities opened his eyes to the benefits of working in the non-profit sector. “Once I started working in non-profits, I realized there was more room to grow and an opportunity to implement new systems and improve things,” he says.

Did you know the non-profit sector contributes *\$5.5 billion in GDP* to the Alberta economy?

Similarly, **Brian Alguire CPA, CMA**, worked his entire career in various industries—from forestry and manufacturing to running the largest pawnshop company in Canada.

It wasn't until he was close to retirement and got a call to lead the \$70-million expansion at the Winspear Centre that he entered the world of non-profits. Although he already had a breadth of experience, his current role as the Vice-President of Finance and Building Operations at the Edmonton Symphony Orchestra and Winspear Centre gives him the opportunity to dive into things he has never done before. “I'm not only working on the financial side, but the operational side as well. The job is beyond finance, and I get to be involved in building, security, or maintenance for example,” says Brian.

Biraj echoes the joy that comes from being in a role where you're called to go beyond finances. As the Finance Manager at the Calgary Immigrant Women's Association (CIWA), he's become accustomed to



Where I am now, because of my role and the organization, I feel like I'm part of the team, and people draw me into things going on beyond my role.

Brian Alguire CPA, CMA



Did you know there are more than 26,000 non-profit organizations and charities in Alberta?

responding to competing demands in a fast-paced environment. “Working in the non-profit sector is actually more challenging. It’s dynamic, [and it] keeps changing every few months,” he says. “When I compare five years back, I’m so much more confident in my work. I don’t see anything where I think ‘we can’t do that’; we always find a way.”

CIWA’s mission is to engage and integrate immigrant women and their families in the Calgary community. To achieve that mission, Biraj has to be agile and innovative, ensuring the organization stays accountable to funders while serving the needs of the community. “I work on at least 30 to 35 program budgets a year as well as the entire organizational budget,” he says.

The spark to start working in the non-profit sector is different for everyone. For Brian, it was a phone call; for Biraj, it was the opportunity to try out a different industry. For **Desiree Bedard CPA, CGA**, it was a volunteer

opportunity that led to her job as the Director of Finance for Ronald McDonald House Charities Alberta.

Desiree had spent 15 years working in the private sector, and when she was preparing to go on maternity leave, she knew she would never go back. She had her first lightbulb moment when she took part in CPA Alberta’s volunteer days at Ronald McDonald House.

“When I volunteered there, the house felt like a home, and the mission of the organization was at the heart of everything. I met the then-Director of Finance, and I was like, ‘That’s a job that speaks to me on many levels,’” she remembers.

As her maternity leave was ending, Desiree saw the job posting for the Director of Finance position and has never looked back. “Every single day working at Ronald McDonald House, I feel like I’m giving back,” she says. “It’s my job, but it doesn’t feel like work. I love it every day.”

Did you know an estimated 1.9 million Albertans are active community volunteers?

Did you know approximately **150 CPA Alberta volunteers** prepared more than **1,800 2019 tax returns** for low-income Albertans?

Brian knows all about how passion-driven work often doesn't feel like work at all. Pre-COVID, you could often find him having lunch in the theatre, listening to the Edmonton Symphony Orchestra practice, or getting a glimpse at the latest musician preparing to perform at the venue. It's a work environment that was foreign to him before he started working there.

"A lot of times doing financial, in my experience, I was isolated from what was going on. Where I am now, because of my role and the organization, I feel like I'm part of the team, and people draw me into things going on beyond my role," he says.

Working for a non-profit organization enables CPAs to be part of not only an organization, but also the very fabric of the community around them. Biraj encourages

Did you know Alberta CPA volunteers delivered **79 financial literacy sessions** in 2020/21 to a total of **2,262 Albertans**?

students to consider the sector for this very reason. "If you want to feel connected to your community, [this] sector is for you," he says. "You're able to use your skills to support an organization but also feel proud that you're helping the community."

Desiree's connection to community through her role at Ronald McDonald House fuels her in a way that she never experienced in past jobs. Ronald McDonald House supports families seeking life-saving medical treatment for their seriously ill or injured children. "I have two young daughters, and they know about the organization. They see the commercials and say, 'That's where mama works,'" she says. "I'm helping drive the mission, making a difference to families, and I'm also passing it on to my children. That feels good."

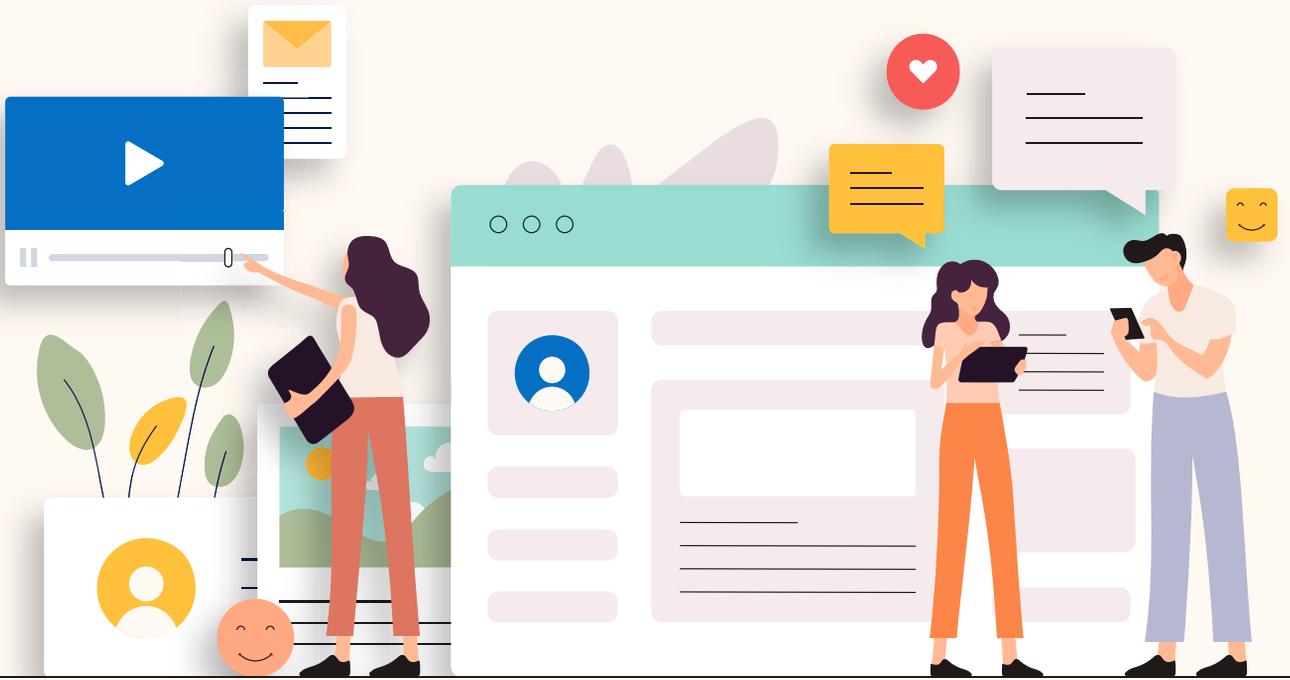
Pride, feel-good moments, personal satisfaction—those are just some of the phrases Biraj, Brian, and Desiree use to describe what they love about working in the non-profit sector. Working in the sector is the ultimate package deal: CPAs get to use their skills and grow in considerable ways while supporting the community and those in need. 



I'm helping drive the mission, making a difference to families, and I'm also passing it on to my children. That feels good.

Desiree Bedard CPA, CGA





PROFESSIONAL SOCIAL MEDIA ETIQUETTE

By Jess Schultz

The **dos** and **don'ts** of social media
for modern day professionals

There's no escaping it: a social media presence is all but essential for professionals in 2022. It never hurts to start your social media networking now as a student and future professional! But this requires a bit of professional social media etiquette, no matter which platform you are engaging on. Here are a few tips as you start creating your own professional presence online.

DO

- Check your spelling and grammar! First impressions matter, and a spelling mistake or a misused their/they're/there could result in a negative one.
- Be a generous giver and share interesting posts and articles from your industry that will benefit your followers.
- Support, and when appropriate, promote businesses and organizations that matter to you.
- Infuse some of your personality into your account. Although it's important to maintain a professional tone on your social media accounts, it's also important that they reflect who you are as a person. Sharing a bit about yourself and your background can be great ways to develop your personal and professional brand.

DON'T

- However tempting it may be, don't argue with negative commenters. While replying to feedback and reviews (both positive and negative) is encouraged, it is not a good idea to enter into an argument in the comments section of any social media platform. Instead, thank the commenter for their feedback and invite them to contact you privately to continue the discussion.
- Never forget to give credit where credit is due. Sharing interesting articles and posts from others in your industry is wonderful! However, be sure that they are receiving credit for their work. When in doubt, send a quick message to ask for permission prior to sharing.
- Avoid posting negative reviews about other individuals or businesses. If you have had a negative experience with a business or individual, it is best to contact them directly and privately.
- Steer clear of posting and ghosting. Social media is intended to be just that—social. Instead of hitting post and logging off, take the time to interact with those who comment on your posts and genuinely try to build connections and network with others. This positively impacts how frequently your posts are shown inside the platform as well. It's a win-win situation!

While it can be tempting to interact with both your personal and professional social media pages using the same approaches, observing this “etiquette” on your professional pages will help you use social media to its full advantage in your career. 

Jess Schultz is a virtual assistant and the owner and operator of Sweet Simple Collabs. She specializes in working with online entrepreneurs and small, local businesses. Jess spends her days helping business owners optimize their systems, free up their time, and maximize their online impact! You can find her on social media @sweetsimplecollabs.



The CPA Certification Program: what students need to know

The CPA Certification Program—which consists of education, practical experience, and a final examination—is designed to provide future Chartered Professional Accountants (CPAs) with the knowledge and skills to succeed in business.

Degree and prerequisites

An undergraduate degree (in any discipline) from a recognized post-secondary institution is required for admission to the CPA Professional Education Program (CPA PEP). In addition to an undergraduate degree, prerequisite courses must be successfully completed.

A transfer credit guide for Alberta post-secondary institutions is available online at www.cpaalberta.ca/Become-a-CPA/Transfer-Credit-Guide.

CPA Professional Education Program

The CPA Professional Education Program (CPA PEP) is a graduate-level program delivered part-time over two years. The program includes six modules designed to develop six technical competencies and five enabling competencies. In Alberta, the national CPA PEP is delivered by the CPA Western School of Business (CPAWSB). CPAWSB delivers CPA PEP to all candidates in British Columbia, Alberta, Saskatchewan, Manitoba, Northwest Territories, Yukon, and Nunavut who are pursuing their CPA.

Candidates will take CPA PEP while working in a relevant position. For candidates, their CPA PEP education, coupled with practical experience, will complement the development of CPA competencies.

CPA PEP uses a variety of learning methods to help students develop their skills. The program combines online learning, self-study, classroom learning, and teamwork to help CPA candidates develop the competencies expected of Canada's pre-eminent professional accountants.



Jeff Herzog CPA

CPA Alberta's new video series

No two (or three or four) CPAs are alike! In fact, CPA Alberta discovered over a friendly game of Never Have I Ever that every CPA has their unique experience and some pretty cool stories. Check out the video series at cpaalberta.ca/neverhaveiever to hear a few of them!

Modules

Six modules comprise CPA PEP. The program begins with two core modules that are common to all CPA candidates, followed by two elective modules (of which there are four options). Upon completion of these four modules, all candidates are required to complete the two "capstone" modules.

The modules are:

- Two common core modules, which all CPA candidates must take, focusing on the development of competencies in management and financial accounting, and the integration of the six core technical competency areas.
- Two elective modules, which allow CPA candidates to develop deeper skills in their areas of career interest. Four electives are offered: assurance, performance management, tax, and finance. All candidates must choose two of the electives; candidates pursuing careers in public accounting must choose assurance and tax.
- A capstone integrative module that focuses on the development of the enabling competencies, such as leadership and professional skills, and the integration of core competencies.
- A capstone examination preparation module, which prepares CPA candidates for the Common Final Examination (CFE).

Registration into the CPA Professional Education Program

Students are encouraged to apply for conditional acceptance into the CPA Professional Education Program (CPA PEP) prior to the completion of their required courses and degree. Registration as a CPA candidate is required prior to registering for specific modules; however, candidates are encouraged to register for modules once they've submitted their application.

Once a student has applied for CPA PEP, there is a registration validation period in which transcript assessment, verification of degree, and verification of prerequisites will occur. After verification, the student may then participate in Core One.

Module registration deadlines are typically six to eight weeks in advance of the module start date. Please refer to the CPA Western School of Business (CPAWSB) website for key module registration deadlines: www.cpawsb.ca/current-learners/cpa-pep/schedules.

For more information about becoming a CPA, please visit www.cpaalberta.ca; call CPA Alberta at 1-844-454-1245 (toll-free); or email gettingstarted@cpaalberta.ca.

To inquire about your eligibility for CPA PEP and admission support, please visit www.cpawsb.ca; call CPAWSB at 1-855-306-9390 (toll-free); or email cpaapplication@cpawsb.ca.

Entrance requirements for the CPA Professional Education Program

Bridging into the CPA Professional Education Program

For students who have completed their degrees but have not obtained the necessary prerequisite courses for the CPA Professional Education Program (CPA PEP), or for students who do not have a degree,* there are two options:

1. CPA preparatory courses

CPA preparatory courses are a suite of 14 courses that provide all knowledge requirements for admission to CPA PEP. These courses are available in an accelerated format and are delivered part-time, with options for self-study, online, and classroom learning. Students complete only the courses they require.

Students are eligible for enrolment if they have successfully completed one year (30 credit hours) of post-secondary studies or three years of relevant work experience.

**Students are still required to complete a degree before admission to CPA PEP.*

Please contact CPA Alberta at 1.844.454.1245 or email gettingstarted@cpaalberta.ca to learn more about preparatory courses.

2. Prerequisites through a post-secondary institution

Students can register for the business and accounting courses they are missing through a post-secondary institution approved by the CPA Western School of Business (CPAWSB). A transfer credit guide is available online at www.cpaalberta.ca/Become-a-CPA/Transfer-Credit-Guide. Students will only take the courses they need for entrance into CPA PEP.

Practical experience

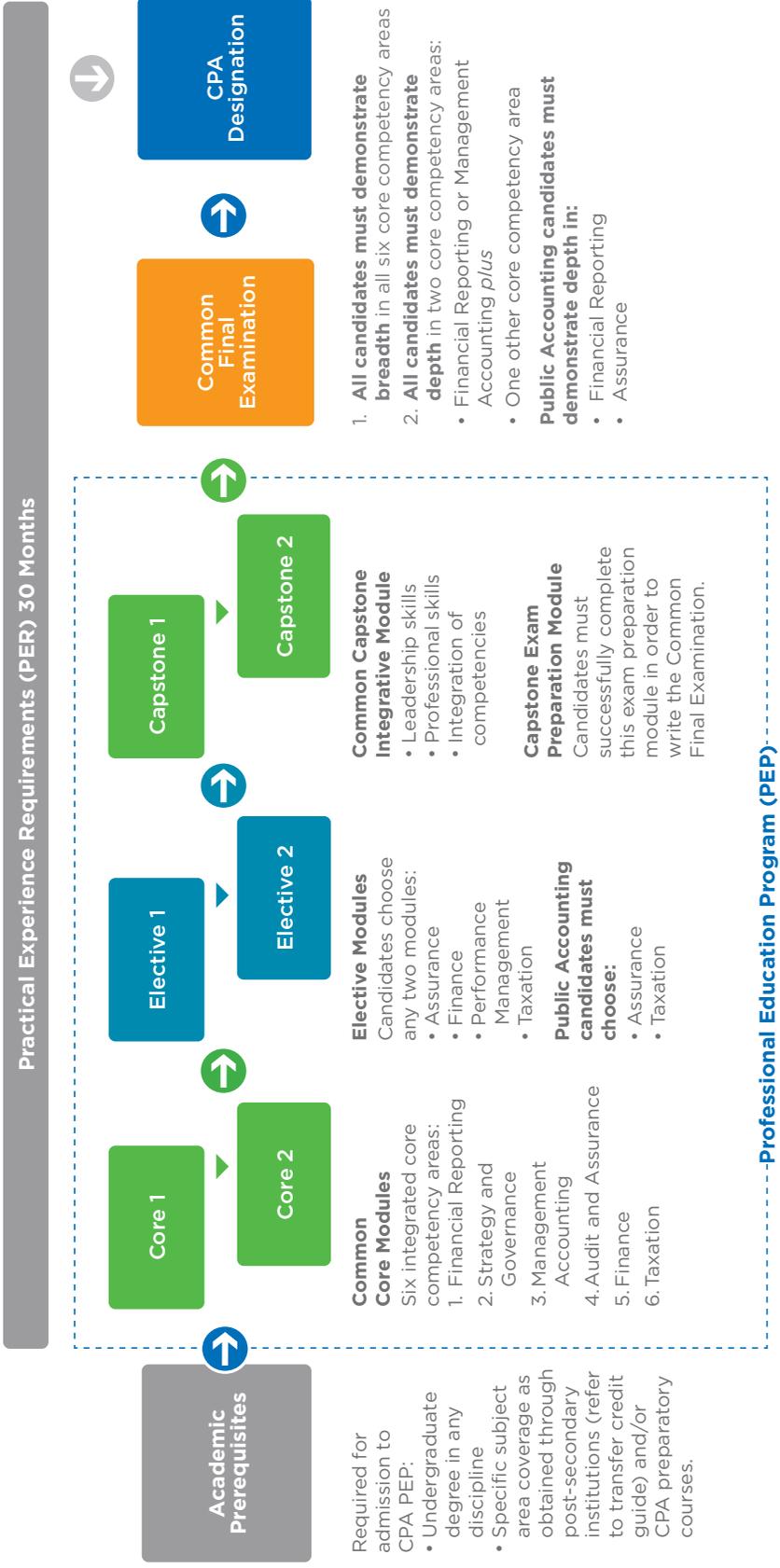
In addition to formal education, candidates are required to complete a term of relevant practical experience. The knowledge and competencies gained through practical experience complement those developed through CPA PEP. To develop as a professional accountant, CPA candidates must gain relevant, paid employment that is progressively challenging. For the period of practical experience to begin, individuals need to be registered with the CPA Western School of Business (CPAWSB) as a CPA candidate, be employed in a qualifying position, and have a mentor.

There are two routes to obtain practical experience requirements:

- **The Pre-approved Program Route (PPR)** in which future CPAs gain relevant experience by choosing a position from a wide range of employers pre-approved by the profession.
- **The Experience Verification Route (EVR)** in which future CPAs demonstrate competence and gain relevant experience at a chosen employer.

Future CPAs can gain experience through either route or a combination of both. The profession may accept up to one year of experience earned prior to registering with the profession. The minimum practical experience requirement for both routes is 30 months; this includes an allowance of up to 20 weeks of time away from work (including vacation time).

CPA Professional Education Program Overview



LEVELLING UP WITH THE CPA DESIGNATION

By Sarah Maludzinski

Photography by HarderLee Photography and Laughing Dog Photography

Three past CPA Alberta Achievement Award recipients share how their CPA designation helped them reach the next level

Choose your player! Will it be the tax expert with a passion for volunteering? The post-secondary instructor who realized her love of being on campus? Or the CEO with extensive international experience?

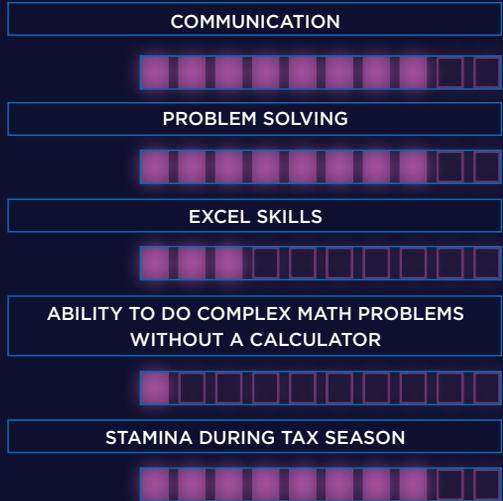
Alberta CPAs take many different career paths after gaining those three letters after their name, but most can agree on one thing: opportunities to level up your career are made all the more possible with the designation.

START >





SKILLS



THE TAX EXPERT

“You don’t think about it very much afterward—you just know you are a CPA—but my designation is pretty integral to the foundation of my career,” says **Hayat Kirameddine CPA, CA**. “I don’t think I would be where I am without receiving the designation.”

Currently a Senior Manager in the tax group at EY, Hayat says her job wouldn’t even be possible if she wasn’t a CPA. “I spend all day every day advising clients,” she says. “My clients wouldn’t take my advice near as seriously without my designation.”

Since earning her designation in 2012, Hayat has also been able to use her financial know-how to “scoot in” (her words!) on some unexpected opportunities, such as teaching at the university level, teaching through CPA Canada, and volunteering with various organizations, such as the Winnifred Stewart Association and Latitude 53. And in 2016, she was named a CPA Alberta Early Achievement Award recipient for those endeavours.

She’s only continued to grow since then. “I think the more experience you have in the field, the more you’re able to own your own career and push it a bit further,” says Hayat. “I’m more independent; I’m able to provide advice and work with clients more independently.”

As for the future? Hayat loves doing consultant-based work in her current role, so she doesn’t see herself moving from there anytime soon. She would, however, like to add in more volunteering and teaching, two passions she took a step back from when she had a child.

Hayat’s two big pieces of advice for future CPAs are to remember that it’s hard work and not to get too tunnel-visioned along the way. “If you would have asked me 15 years ago if I’d be a nerdy tax consultant, I would have told you vehemently no,” Hayat says with a laugh. “Just let yourself see the things you’re good at and get excited about along the way. That will help guide where you might end up.”

PLAYER SELECT



SKILLS

ABILITY TO DO COMPLEX MATH PROBLEMS WITHOUT A CALCULATOR



ABILITY TO JUGGLE WORK AND LIFE



COMFORT WITH TEACHING VIRTUALLY



INNOVATIVE THINKING



PASSION FOR ACCOUNTING



Kiersten Walker CPA, CA



Having to pivot all classes to online and teaching online, I definitely think I've had to change as a professional. Part of what's helped has been the skills of resiliency and adapting to change that I have as a result of my designation.

Kiersten Walker CPA, CA



THE INSTRUCTOR

"I never really considered becoming an accountant without getting [my designation]," says **Kiersten Walker CPA, CA**. "And I certainly never went to get my accounting designation thinking I'd end up in education."

Kiersten's path as an accounting instructor at NAIT began as just one night of teaching a week while still working in public practice. "Being on campus in university was my absolute favourite experience," she says. "So to get back in the classroom, be back on a campus, I was like, 'Oh, that would be really fun and a good challenge.' But one night a week turned into...doing some contract work for a while and working my way in."

Now a full-time instructor, Kiersten says a lot has changed since she was named a CPA Alberta Early Achievement Award recipient in 2019. Most of that change, however, came from something we're all familiar with: the COVID-19 pandemic.

"Having to pivot all classes to online and teaching online, I definitely think I've had to change as a professional," says Kiersten. "Part of what's helped has been the skills of resiliency and adapting to change that I have as a result of my designation."

But change isn't always a bad thing! Kiersten is passionate about teaching future CPAs at NAIT, and she says the changing landscape of accounting ensures it's never boring. "In a way, my future plans are status quo, but there is all that other constant change, so it definitely feels challenging," she says.

At the end of the day, Kiersten believes the CPA designation creates an almost-instant network of CPAs, "who are so willing to help each other out," and she says it opens up unlimited paths for success.

"What I always encourage students to remember is that where you are right now is not necessarily where you're going to end up," she says. "You might not love every class. You might not love every audit. You might not love every moment you spend receiving your designation, but none of that is an indicator of how bright your future will be."



We're not just looking at an ordinary comfortable job; if you have your CPA designation, the odds are highly in your favour to succeed in a senior leadership role.

Shahid Qureshi CPA, CGA



THE CEO

Shahid Qureshi CPA, CGA says if he were not a CPA, he might have struggled to reach where he is today as the CEO of an international consulting business. “A CPA designation gives you an instant recognition around your knowledge base and access to support from highly skilled experts,” he says.

In addition to his work as a CEO, Shahid is the Chair of the Calgary Parking Authority, sits on multiple international corporate boards, and has senior governance roles with the federal government. So he knows what he’s talking about when he says the CPA designation has recognition across the globe, and he considers it to be one of the best accounting designations available.

Though he has many areas of expertise—and, in turn, several qualifications and designations—Shahid says his CPA designation is foundational. “If I took my CPA designation out of my portfolio of qualifications, my portfolio would become less valuable,” he says. “Most of my professional education pivots around my finance qualification. A finance qualification gives you a holistic view of the business strategies that no other qualification is able to provide.”

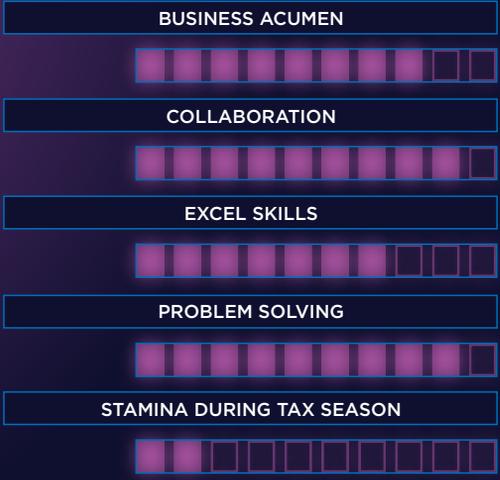
Receiving the CPA Alberta Distinguished Service Award in 2018 only helped raise his profile: his social media post on the award netted him more than 100,000 views, and he’s still receiving congratulations for it years later.

It may already be apparent, but Shahid is a big believer in lifelong learning, and his plans for the future focus on doing just that. “I have been upgrading my professional skills since I graduated,” he says. “The benefits of lifelong learning go beyond career advancement.”

He recommends everyone strongly consider getting their CPA designation if they’re serious about finance or business. “The CPA designation gives you a very high probability of being reasonably successful at the top of the pyramid,” he says. “We’re not just looking at an ordinary comfortable job; if you have your CPA designation, the odds are highly in your favour to succeed in a senior leadership role—as long as you also work hard and have a little bit of luck on your side.”



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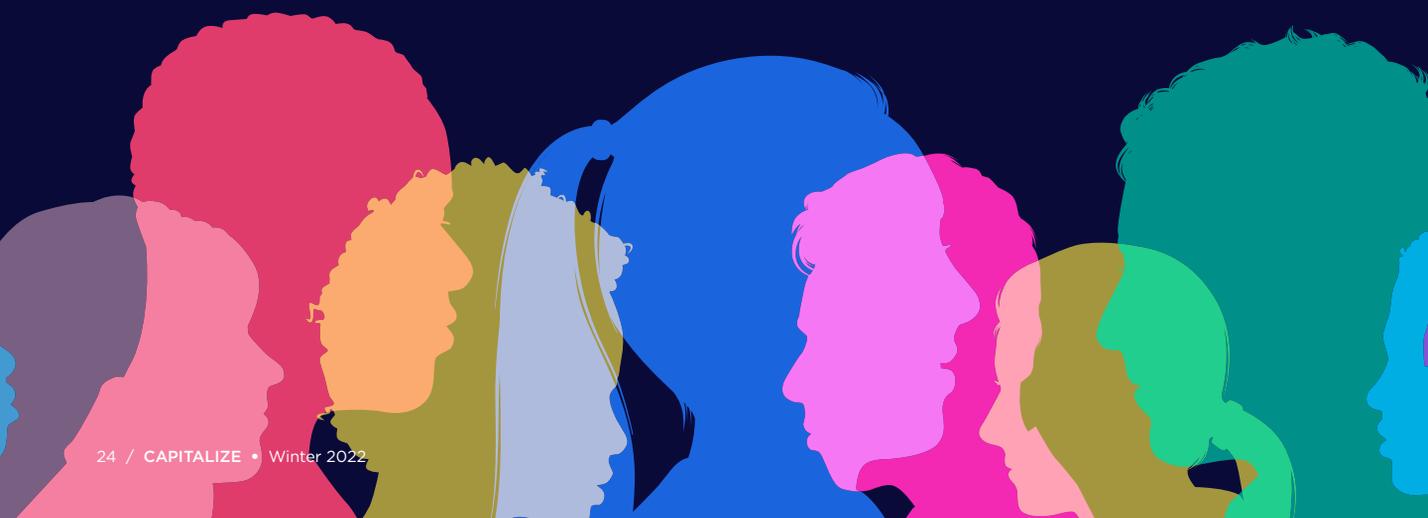


Shahid Qureshi CPA, CGA

RECOGNIZING AND ADDRESSING MICROAGGRESSIONS AT WORK: A GUIDE FOR STUDENTS

By Pauline Greenidge CPHR, SHRM-SCP

Microaggressions are, by definition, subtle, but they can have a huge impact. How can you handle them?





PICTURE THIS: It's your second week in your co-op term at an amazing firm. It's a great opportunity with lots of training, hands-on work, and a chance to engage with interesting and diverse clientele. You've spent the last couple weeks onboarding with the firm and getting to know your colleagues. Your supervisor, Sally, has been great.

Sally invites you to an online working session where you meet some of the firm's most senior team members and help out on financial reporting and strategy for a client. You are assigned to a breakout room to work on some key deliverables, and you're excited.

In your breakout room, everyone introduces themselves, and the team welcomes you. After you introduce yourself, one of the team members asks, **"Where are you from?"**

"I grew up in south Edmonton," you say.
"Sure, but where are you actually from?"

"Where are you actually from?" is just one of many common microaggressions that happen in the workplace, and while it may seem like an innocent question, it has a huge impact in making colleagues feel othered and unwelcome in professional settings.

What are microaggressions?

Microaggressions are subtle and can be unintentional, but their impact is significant. They include insults, dismissals, or invalidations based on, but not limited to, race, gender, ability, age, identity orientation, or religion. They can sound like:

- **Microinsult:** "It's great to see someone from your community with such great skills, so welcome to the firm." This assumes skill is novel or unusual due to ethnicity, race, or cultural heritage, not individual ability.
- **Microinvalidation:** "Sure, but where are you actually from?" This assumes the person is from elsewhere based on race or cultural heritage, which invalidates a person's actual experience.
- **Microassault:** Telling a racist joke and then saying, "I was just kidding." This is intentionally participating in a discriminatory activity but not wanting to appear as offensive.

What should I do if I experience a microaggression at work?

It can help to decide in advance what your strategy will be if you experience or witness a microaggression at work. Here are some helpful tips:

- Take a deep breath and stay calm. What you heard or saw is real.
- Decide if, how, and when you want to respond. Will you use humour, create a conversation with the person about it, or ignore it completely?
 - If you decide not to respond, tell a trusted colleague or supervisor to get perspective.
 - If you respond, share with the person how what happened made you feel. This can help create more understanding about your experience.
- Contact HR to get advice, especially if the person you are responding to is more senior than you.

No one should have to experience microaggressions. As a young professional, knowing what they are, creating a strategy for yourself, and being an ally for others will help you and your organization move forward positively. 🗣️

Pauline Greenidge CPHR, SHRM-SCP is the founder and principal of Upward HR. She is passionate about the improvement of people's capabilities and their engagement at all levels of organizations. In addition to working with corporate clients and individuals, she is an Instructor in Continuing Education at the University of Calgary. She is also on the Government of Alberta's Anti-Racism Advisory Council.





MONEY AS A TOOL FOR EMPOWERMENT

By Caitlin Crawshaw | Photography by KTB Photography



Selina Gray helps clients approach financial management holistically

ON A HIGH SCHOOL TRIP TO PARIS, Selina Gray CPA, CA looked up at the Eiffel Tower and had an epiphany. “I knew I wanted to continue to travel and would need a career that would make it possible,” she says.

Selina had long been interested in money: earning it by doing odd jobs in her small town and managing it as the bookkeeper for her father’s small construction business. She set her sights on accounting, earning a Bachelor of Commerce at the University of Saskatchewan.

Excited to launch her career, Selina moved to Calgary. She worked as a senior associate before taking on controller roles, and before she knew it, she was travelling to far-flung places like Dubai, Tunisia, Ethiopia, and the UK, living the cosmopolitan life she’d dreamed of. Selina was on track to become a CFO by her 30th birthday.

But it came at a cost. “I was working between 100 and 120 hours a week. I was always working,” says Selina. “My arms and legs started going numb and my stomach was always upset.”

She began a food regimen, but it didn’t help. Other symptoms appeared, like rashes, heart palpitations, and swollen ankles, which required her to swap out her heels for flip-flops in the office. Selina’s joints hurt so much she could barely get out of bed.

One day, she passed out in her office in Tunisia. Too sick to work, she flew back to Calgary for medical care. After three weeks recuperating in the hospital, Selina was finally diagnosed with Crohn’s disease, an autoimmune disorder.

“The illness was a curve ball,” she says. “I remember being in the hospital and really wanting to get back to work.”

However, the treatment plan she needed wasn’t available overseas, so Selina couldn’t go back to her old life. She knew she wanted to be an entrepreneur—one of the many goals she’d had since she was young—and decided to use the skills gained by her designation to help her do so.

Selina moved to Edmonton for a fresh start, and she worked a desk job for a year, while starting to build her own business, before giving birth to her first child. During her maternity leave, Selina focused on growing her business. Moneyboss Ltd. launched full time at the end of 2015.

Now, Selina helps clients, mainly women in leadership roles, develop healthy relationships with money, build more earnings, and optimize cash flow in their businesses. In her role as a “financial empowerment coach,” she’s equal parts financial coach and business mentor, helping people align their values and goals with their financial choices. The concept at the heart of it is an idea called conscious wealth.

“It’s starting to learn about the emotional impact of how we see our money and our lives, and those decisions we make about earning, spending, and saving,” she says. Selina wants clients to consider money as a tool—not an end goal.

“It’s learning to live a life that feels wealthy, so starting to ask, ‘What do I actually want? What brings me joy?’ In my life, I was striving to achieve only financial wealth, and it almost cost me my life,” says Selina. “Now I live a life and ask, ‘How can I embody more richness today?’” 

HOW TO BE A GOOD COLLABORATOR

By Ginny Ao

Photography by Laughing Dog Photography



Discover the traits that make a good collaborator and strategies to overcome competing with others



That's what is great about being part of a team that has the mentality of collaboration. Someone's opinion can add to an idea, and that can develop into a larger project.

Michelle Werkman CPA, CMA



REGARDLESS OF WHETHER you're an experienced executive or a new professional, the importance of collaboration cannot be underestimated. The ability to work well with others is an attribute that can make a big difference in your work. But what makes a good collaborator? How can someone ensure they are a good collaborator even in the face of competition?

A couple of seasoned CPA collaborators share their insights on these topics.

Collaboration in action

Whether it's through structured brainstorming or casual chats, collaboration can be the magic ingredient that evolves a simple idea into a strong concept.

"Collaboration allows a group to enhance individual ideas. We are constantly bouncing ideas off of each other [where I work]," says **Michelle Werkman CPA, CMA**, Operations Manager, Client Services, at Video Tax News. "That's what is great about being part of a team that has the mentality of collaboration. Someone's opinion can add to an idea, and that can develop into a larger project."

This is one example of collaboration in action. Collaboration is a normal part of many CPAs' day-to-day work life and is needed to ensure projects are completed.

This is especially true for **Ademola Ajidagba CPA, CMA**, Manager, Internal Audit, at Alberta Health Services. At any moment, Ademola could be working with his immediate team or with others across the organization to gather data from various departments—and collaboration is key.

"Whether you're performing a risk assessment to determine the audit focus or conducting a project, you have to work with others," says Ademola. "It's crucial that I collaborate with my audit team, but for certain projects, I could be collaborating with other stakeholders, like participants at the entity being audited and their leadership or management."

In cases like these, collaboration isn't about just brainstorming, but rather working with others to achieve a goal; Ademola believes this is essential to a project's success.

"What's important is that there is cooperation among all parties involved," says Ademola.



Good collaborators are self-aware. You need to know your own talents, values, and beliefs. You also need to be curious—seek to understand others, different views and perspectives, and be curious about the subject you are collaborating on.

Ademola Ajidagba CPA, CMA



What makes a good collaborator?

So how can you make sure you are a good collaborator? According to Ademola, good collaborators have three distinct qualities.

“Good collaborators are self-aware. You need to know your own talents, values, and beliefs. You also need to be curious—seek to understand others, different views and perspectives, and be curious about the subject you are collaborating on,” explains Ademola. “Finally, good collaborators need to be respectful. You need to be tolerant and appreciative of other people’s views.”

A good collaborator should be “open-minded and have a willingness to learn,” agrees Michelle. “Collaborating with open minds creates a safe environment to share and a pathway to build on ideas.”

These qualities allow you to put your best foot forward when collaborating, and they are also handy when you encounter challenging situations with group members.

What is collaboration over competition?

From colleagues vying for a promotion to working with a tough team member, it is natural to come across some form of competition when you’re working with others, and Ademola and Michelle have practical advice.

If you find yourself in a “difficult situation that isn’t going anywhere, everyone should pause and jointly revisit the goal or objective of the project,” suggests Ademola. “If you have a common understanding of what you are trying to achieve and what success looks or should look like, any disagreements can be overcome.”

“It’s important to remember patience and empathy and [use your] emotional intelligence,” says Michelle. “Try and approach these situations from the other person’s point of view.”

As Ademola and Michelle explain, a good collaborator is respectful and open to different views and perspectives. So putting those traits into action will help you manage challenging situations and provide you with the ability to push past obstacles and achieve your goals. 📌



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Frederick Enorme, recipient of the David Bentley FCPA, FCA and Janet Bentley Post-Secondary Excellence Award

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CPA Education Foundation student awards

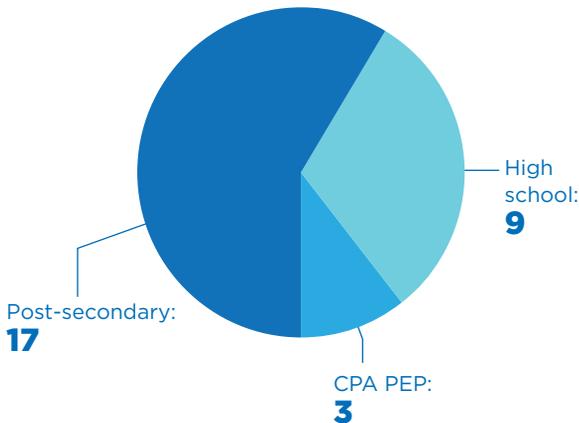
The CPA Education Foundation is passionate about helping students reach their CPA designation goals and recognizes that education is a significant financial investment. That's why the Foundation offers a variety of awards to help ease the financial barriers of higher education for students at all stages of their educational careers, from high school to post-secondary and through to the CPA Professional Education Program (CPA PEP).

Post-secondary and CPA PEP awards deadline: January 31 each year
High school awards deadline: May 1, 2022

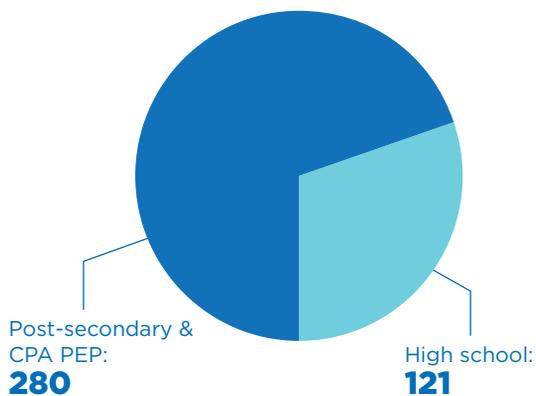
For more information on any of the CPA Education Foundation scholarships, please visit cpaalberta.ca/scholarships.

Did you know the CPA Education Foundation provided more than \$145,000 in funding for student awards, scholarships, and bursaries in the 2020/21 year?

Number of awards available in 2022



Applications received in 2021



Have questions?

Connect with us at cpaef@cpaalberta.ca

Recipient profiles

The CPA Education Foundation's awards are for every kind of student. Whether you're a community-builder, philanthropist, academic, or future entrepreneur, we'd love to hear your story! Here are some of the 2021 recipients.



"It's scary to take risks, but risks and hard work need to be taken in order to achieve success. Receiving this award is confirmation that hard work and determination pay off. Through the various obstacles I've had to overcome, I've learned that perseverance and diligence lead to opportunity and success."

—Christopher Stevens, recipient of the LGBTQ2S+ Success Award



"My goal is to become a Chartered Professional Accountant and to open my own accounting firm. The small town I grew up in has impacted me greatly, and I plan to invest what I have learnt at university directly into helping the community around me. I hope that, one day, all the knowledge I acquire in my education will help me change people's lives."

—Melanie Jubinville, recipient of the Stepping Up in the Community Award



"As a caregiver for my grandmother, I was unable to work in order to safeguard her health during the pandemic. I am grateful for this award as it eases the financial burden and allows me to focus on my education and efforts to better myself."

—Bianca Bhattacharjee, recipient of the Alex Tutschek FCPA, FCA Award for Indigenous Student Post-Secondary Achievement

SUCCESS THAT MATTERS

How the CPA profession is supporting the next generation of CPAs

By Kevin Spila | Photography supplied

In September 2020, the Foundation launched six new scholarships to support Alberta high school students in their pursuit of post-secondary education; those scholarships include awards for students in rural communities, LGBTQ2S+ students, and students who are Black, Indigenous, or People of Colour. The Foundation's goal is to attract and support future CPAs with diverse backgrounds and experiences. Bisola Anifowose was one of the first recipients of the 2021 Black, Indigenous, and People of Colour (BIPOC) Success Award.

When her family moved to Canada in 2014 from Port Harcourt, Nigeria, Bisola set her sights on becoming a CPA. During her three years attending high school in Calgary, she consistently achieved some of the highest marks among her peers in all of her courses—including her favourite subject, mathematics—and maintained honour-roll standing through every grade level.

Once she graduates from the University of Calgary in a few years, Bisola plans to pursue her CPA designation. "I want to be part of a career where your opinions will matter," she says. "As an opinionated individual who has a point of view on various aspects of our society, I want to be able to influence business decisions that impact society."

Bisola also has plans to give back to others with the same generosity as the donors who support the scholarships offered by the Foundation.

"If I could personally thank the many donors and CPAs for their donations, I would start by being appreciative of the kindness of their heart," she says. "Thanks to them, individuals like me can be supported financially and can spend more time focusing on my studies." Eventually, Bisola hopes to volunteer with international organizations that support children who have had limited opportunities.

To learn more about the CPA Education Foundation scholarships available, please visit cpaalberta.ca/Scholarships.

Bisola Anifowose, recipient of a Black, Indigenous, and People of Colour (BIPOC) Success Award



WHAT'S NEW AT THE HESJE CPA KNOWLEDGE CENTRE

The Hesje Centre increases its support for rural high schools

By Kevin Spila | Photography supplied

Hailing from a small town himself, **Brian Hesje** FCPA, FCA was passionate about connecting with and providing opportunities for high school students, particularly in rural areas. Sadly, Brian passed away in 2021, but, through the CPA Hesje Knowledge Centre, his legacy of supporting and fostering rural youth in becoming future business leaders continues to this day.

One of the exciting initiatives the Centre has been working on is the Trailblazer youth program in partnership with 4-H Alberta. After a successful pilot this past spring, the Trailblazer program officially launched in October 2021 and is now available province-wide. In this program, 4-H members discover their inner entrepreneur and learn the basics of building their own business. Throughout the program, they'll have the opportunity to learn from Alberta CPAs and will pitch their business ideas to a panel of CPA mentors—also known as the “CPA Den.”

If you're involved in 4-H and are keen to hone your business skills, we encourage you to learn more about the program by visiting the 4-H Alberta website at 4hab.com.



The Trailblazer program showed me what it truly means to be an entrepreneur. It covered the basics like financial literacy and marketing strategies, as well as how to create a business plan and the value of making connections with those around us. All of these business skills will be very beneficial for me as I build my career.

Kieran Jones, Trailblazer participant and recipient of the CPA Education Foundation's Stepping Up Entrepreneurial Spirit Award



The CPA Education Foundation's Hesje CPA Knowledge Centre was established thanks to a generous gift from Brian Hesje FCPA, FCA, an accomplished Alberta business leader and community builder. The Centre, which was established in March 2019, is a virtual hub of resources and materials featuring Alberta CPAs sharing their unique perspectives and vast expertise on a wide range of topics and issues. If you're interested in learning more about the Knowledge Centre, please visit cpaalberta.ca/Foundation/Hesje-CPA-Knowledge-Centre.



Podcast Season 3 is on the air!

If you haven't tuned in to the Centre's *Straight From the CPA's Mouth* podcast yet, you really should. It has great insights into the topics you'd expect—and maybe not expect—from Alberta CPAs, from financial literacy and tax tips to building resilience and breaking barriers in the CPA profession and beyond.

To learn more about the podcast and the Hesje CPA Knowledge Centre, please visit cpaalberta.ca/Foundation/Hesje-CPA-Knowledge-Centre.





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SQUASHING STEREOTYPES

Photography by Laughing Dog Photography and Ramsey Kunkel Photography
By Sharon Ruyter

Three CPAs bust common myths about auditing

Matt Kuny CPA, a Corporate Accountant at ATCO, found the perfect job for his personality type. As an introvert, Matt believed auditing was the best way to use his designation because he thought it would provide him with a role where he could work mostly alone to achieve his professional goals and those of his organization; he thought this was an ideal way to stay comfortable as an introvert in a professional setting. Little did he know that he would end up loving auditing because of its collaborative nature and opportunities to work with people.

In contrast, **Danielle Wong** CPA, CA, Partner, Audit at KPMG Canada, never thought she would end up in audit. In fact, she never even thought she would become a CPA—never mind an auditor!—when she started university. “I had a stereotypical view of what accountants were like, so I did not originally pick it as my major,” she says.

Danielle wanted a role that allowed her to work in a social setting, where she could work collaboratively with others in a high-performing, fast-paced team environment, and mistakenly thought auditing wasn’t for her.

Fast forward to the present, and both have found auditing has a lot more to offer than they originally thought. Matt excitedly describes the highlight of his job as the opportunity to work with others—a surprising admission from someone who wanted less interaction in his job. “The chance to work collaboratively with clients and other team members is what excites me about being an auditor. I love working with others on complex issues and also passing on knowledge. Auditing gives great opportunities for both of these,” he says.



Matt Kuny CPA

In addition to the myth that auditors work alone, there are a number of misconceptions and myths about auditors and auditing out there. The following are a few of the most common ones, and as you’ll discover over the next few pages, there’s a lot more to auditing than you might have thought!



Danielle Wong CPA, CA

MYTH: Auditing is boring

Danielle has seen firsthand how auditing is anything but boring. “My days often look very different from what I had planned out in the morning. I am constantly pivoting to solve problems and overcome challenges, which motivates me in my line of work,” she says.

For her, a typical day includes working on complex, large integrated audits, helping clients through technical accounting issues, and coaching her team as they work to gain deep knowledge of a client’s business and apply that within the audit. In fact, the role is exactly what she wanted when she was looking everywhere but accounting for a career choice. It is full of collaboration, teamwork, continuous learning, and opportunities to grow alongside a supportive and nurturing team.

MYTH: Auditors work alone

When you boil it down, auditing is really all about relationships. “Relationships first” is Matt’s professional mantra. “So much of being a good auditor is building a relationship with your client,” he explains. “Having a strong relationship makes them open up more to provide you with the information you need to better understand their business.”

This is especially important during the tough audit times. “Audits are sometimes the most stressful and busiest time of the year for clients. When they are able to go through this with someone they can relate with, it makes a better overall experience for both them and us,” he says.

MYTH: Auditors are only focused on finding mistakes

The client-auditor relationship is one of the most important aspects of an auditor’s role, and often the most misunderstood. That’s because some auditors are mischaracterized as being hard-nosed investigators out to find every mistake in the financial books of businesses. Some auditors do consider themselves detectives of the accounting field, but as Danielle explains, it’s much more than that.

“More broadly, we’re in a position where we have a lot of expertise that allows us to help clients work through business issues,” she says. “One thing that excites me about my job is knowing that my clients see me as a trusted advisor. They know they can reach out to me with any questions they have and that I can work through it with them.”

Auditing and advising go hand-in-hand for **Josephine Naicker CPA**, Senior Manager, Technology Audit at ATCO, and she applies this to internal clients within her organization. “It’s our duty to share what we learn,” she says. “My team and I advise management on governance, risks, and compliance...to proactively walk the path with management on new IT implementations, thereby contributing to the success of the project rather than coming in at the end of the project.”



The forces of innovation and technological advancement continue to accelerate the changes in auditing. It's exciting to be at the centre of a fast-changing landscape. It keeps me on my toes.

Josephine Naicker CPA



MYTH: Auditing is nothing but office work

A fun perk of being an auditor is all the cool places it can take you. Josephine recalls the time her previous audit role required her to sleep in a treehouse for multiple nights. "I had to do an inventory count for the Zulu Kingdom royal household in South Africa. When they asked me to choose between a five star hotel or a tree house for my accommodation, I chose a tree house," she recalls. (Unfortunately, her tree house stay was short-lived when a snake decided to pay her a visit in her aerial accommodations!)

Similarly, Danielle will never forget auditing at a high-end jewelry store. Early in her career, she got the opportunity to perform the audit of a lifetime when she had to do an inventory count of diamond rings and necklaces. On the flip side, she also fondly looks back on her work trip to North Carolina, where she completed a less-glamorous inventory count of fertilizer!

MYTH: Auditing is static

No two or three auditors' experiences are the same, but there is a common thread to what keeps Matt, Danielle, and Josephine in the auditing world: change. "The forces of innovation and technological advancement continue to accelerate the changes in auditing," Josephine says. "It's exciting to be at the centre of a fast-changing landscape. It keeps me on my toes."

Auditing is a great path for anyone looking to be part of a progressive field filled with excitement and development. "The world keeps changing, and I'm excited that I can be a part of this change, where I can develop our leaders of tomorrow, embrace innovation in everything, and embed an equitable and inclusive culture," says Danielle. "As a third-generation Chinese Canadian, a working mother, and a young female audit partner, I look forward to bringing new perspectives to our profession and helping shape the future of the designation." 

Josephine Naicker CPA



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