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FALL 2014

capitalize

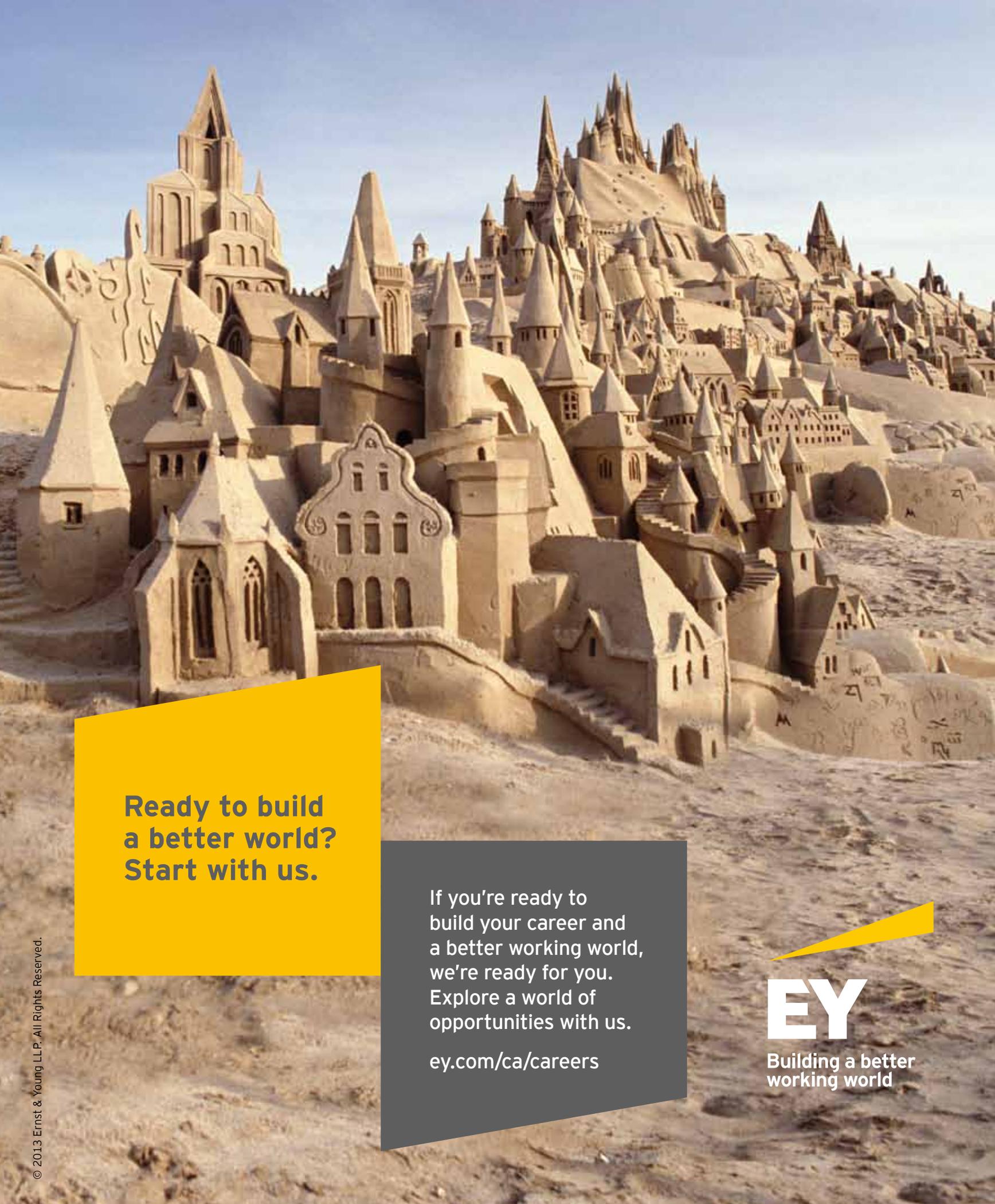
Introducing Alberta Students to the Accounting Profession



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working world**

Editor

Natasha Constantin

Contributors

Shelley Kesselman
Magdalena Matracki
Chris Pilger
Gitte Sorensen

Capitalize is a semi-annual magazine designed to introduce students to the accounting profession in Alberta. Published by the Institute of Chartered Accountants of Alberta, in cooperation with its partners at the Alberta Accountants Unification Agency, the magazine is distributed to more than 4,500 readers including university, college, and high school students, as well as career counsellors and other student-oriented services.

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events CALENDAR

From career fairs to conferences to information and networking sessions, included below is a comprehensive list of the activities you should know about!

September

- 4 Information session: SAIT, Aldred Centre, Room CA415 (11:30 a.m. – 12:30 p.m.)
- 8 Information session: University of Lethbridge (Calgary Campus), Room S6025 (5:00 – 6:00 p.m.)
- 8-12 Haskayne House Orientation: University of Calgary
- 9 Information session: University of Alberta (location: TBD)
- 10 Information session: University of Calgary, Oak Room (12:00 – 1:00 p.m. and 1:00 – 2:00 p.m.)
- 10 Information session: University of Lethbridge, Students Union Ballroom A (3:00 – 4:00 p.m.)
- 12 Meet Your Employer: Edmonton, Westin Downtown (9:00 a.m. – 4:00 p.m.)
- 17 Meet Your Employer: Lethbridge, University of Lethbridge Students' Union Ballroom (3:00 – 7:00 p.m.)
- 19 Meet Your Employer: Calgary, BMO Centre (9:00 a.m. – 4:00 p.m.)
- 21 Golf tournament: University of Alberta, Business Students Association
- 24 Career fair: University of Alberta, Universiade Pavilion
- 25 Information session: Mount Royal University, Room EB 1006 (3:00 – 4:00 p.m.)
- 26 Career fair: University of Lethbridge, 1st Choice Savings Centre for Sport and Wellness

October

- 1 Information session: NAIT Campus, Room T211 (5:30 – 6:30 p.m.)
- 3 Golf tournament: Mount Royal University, Bissett Accounting Students' Society, Elbow Springs Golf Course
- 7 Advantage Dinner: Lethbridge, Galt Museum, 502 1st Street South
- 9 Advantage Dinner: Calgary, Hotel Arts, 119 12th Avenue SW
- 21 Advantage Dinner: Edmonton, Fairmont MacDonald, 10065 100th Street NW
- 24 Dress & Dine for Success: University of Calgary, Commerce Club

November

- 24 Registration deadline: CPA PEP, January 2015 intake of Core Module 1

For more information about these events email: yourpath@albertaaccountants.org.

Message from the Editor

In Dr. Seuss' last book, "Oh, The Places You'll Go!" he shares a story about a boy who sets off into the world to see what life will bring him, encountering all sorts of crazy adventures along the way.

As we put together the 2014 fall issue of *Capitalize* magazine, we considered the adventures many of you—prospective accountants—will have on your journeys with careers as designated accountants. There will be many places you'll go, literally and figuratively.

You'll go into unmarked territory—into a brand new accounting education program.

You'll go to work in public practice, business, industry, government, and maybe even education.

You'll go across the nation, or even across the world.

You'll go right up the corporate ladder as a Partner, CFO or President of a large organization, or right in the trenches, as an entrepreneur running your own business.

The stories in this issue of *Capitalize* profile CAs, CMAs and CGAs and the adventures they've experienced in their livelihoods. This issue will also include other articles related to a career in accounting, including detailed information on the CPA Certification Program and how it works.

Whether you're still considering your options, or you've decided that a career in accounting is the path for you, remember that each experience is a learning opportunity "And YOU are the one who'll decide where to go..."—Dr Seuss, *The Places You'll Go!*



Natasha Constantin
Editor
n.constantin@icaa.ab.ca



A special thanks to Pedro Carriel CMA and Hua Wei Chan (CA student) for their time volunteering as our "cover models."

Thank you to the Edmonton International Airport for accommodating our photo shoot.

Unification Update

Over the coming months the designated accounting profession in Alberta expects to complete the unification of Alberta's CAs, CGAs and CMAs under the Chartered Professional Accountant (CPA) banner. Provincial legislation is required in order to make the unification official, and the Alberta Accountants Unification Agency (AAUA)—representing all three designations—is working closely with the Government of Alberta to have that legislation passed and proclaimed. In the meantime, the CPA Professional Education Program (or CPA PEP) has already been introduced in Alberta and accepted its first candidates in 2013. For students seeking to become designated accountants, CPA PEP is the training program now offered in Alberta. In this issue of *Capitalize*, you can find detailed information about CPA PEP and how it works.

Our profession knows that the process to achieve unification of the profession in Alberta has created some uncertainty for many students planning their careers. We hope that most of that uncertainty is behind us now, and we urge you to contact the friendly people at the AAUA if you have any questions about the impact of unification on your career plans.

If your student group has an event it would like to feature in the next issue of Capitalize, let us know by emailing careerinfo@icaa.ab.ca.

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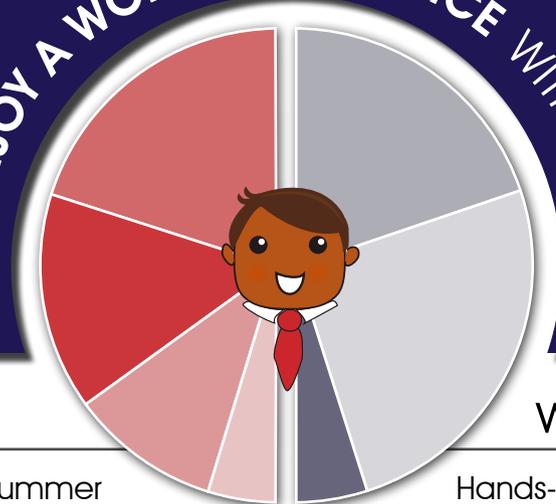
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Learn what it means to be among like-minded professionals who share your

Exploring international waters

By Shelley Kesselman



If you see a solution to a problem, you naturally want to apply it, no matter where in the world it is. “An understanding of accounting, business process and analytics can be applied anywhere,” says **Jeff Brown FCMA**, CEO and President of PL&B Insurance. “The world stage is truly available to anyone interested in solving global issues.”

Jeff graduated with a BBA from the University of New Brunswick. Early on, he realized a professional designation was essential to move up the corporate ladder. Jeff received his CMA designation in 1993 and was named an FCMA in 2013. He took on a variety of roles in the insurance industry and after purchasing shares in Pratt, Lambert and Brown from his parents, became the company’s sole shareholder in 1994.

His father’s advice to ‘look after others and they’ll look after you’ has been a guiding force in Jeff’s career.

“It’s a simple statement, but it sums up what we all know: no one is going to pay you just because you want money. Get a great education, develop a unique vision and plan, work hard and deliver value. Success will follow.”

Along with his executive roles at PL & B, Jeff applies his accounting and finance knowledge around the world.

While on a charity trip to Uganda in eastern Africa, Jeff was introduced to the process of solar water disinfection. “We knew the process had to be revisited, and people needed to be better trained if we were to entrench a permanent change in water disinfection practices,” says Jeff. To do this, Jeff established his own charity in 2005 called Sun Safe Water.

Sun Safe Water has done work in Uganda, Kenya, Indonesia and Brazil, with most work presently done in Cameroon. This relatively simple process to disinfect water uses a clear plastic bottle, sunlight and careful instruction. It is effective, inexpensive, simple and culturally acceptable.

“Archaeologists approximately 30 years ago were wondering why ancient Romans left pans of water in the sun,” says Jeff. “Remarkably, they found the sun’s energy, under the right conditions, was sufficient to destroy most pathogens.”

The process is dependent on a reliable supply of the right kind of plastic bottles, which led Jeff to become involved in managing a water bottling and pharmaceutical production facility in Cameroon.

With Sun Safe Water, 100 per cent of donations are directly spent to benefit the children and families of its target partners. Sun Safe Waters’ simple Vision statement says it all: the world can work

“The world stage is truly available to anyone interested in solving global issues.”

—Jeff Brown FCMA

for everyone. Our part is to focus on practical solutions to the elimination of disease caused by the consumption of contaminated water.

“I’ve never thought of this work as altruistic. There is really a great deal of personal benefit,” says Jeff. “The rewards are new friendships, new understanding of our world, seeing interesting landscapes and faunae, absorbing new cultures and a feeling of being alive. No matter how hard I try to be of benefit to others, it seems I get the most from these ventures.”

Designated for more than 20 years, Jeff says travel and some unusual projects impact how he uses his education and expertise. He is more confident, he says, in applying his skill set in unique situations. “My interests have taken me to some very remote locations around the world, and what they say is true: it really is a jungle out there.”

BECOME A PRO.

If you're considering a career in the world of business or finance, choose the accounting designation that maximizes your opportunities. Develop the business and accounting skills valued globally in every sector of the economy by entering the CPA Professional Education Program.

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Top Tips for Business Travel

By Allison Wallace, Director of Media & Communications for the Flight Centre Travel Group



Business travel can be exciting, not to mention a little daunting, particularly if you're a young professional just starting out. Here are some tips to help you make the most of your upcoming business trip and release your inner road-warrior.

Documents

It may seem like an obvious tip, but first make sure your passport is valid. For many countries your passport must be valid for 6 months AFTER your return home—something often overlooked. Visas are a further travel consideration and are required for many countries that you may not have expected, such as Australia, Brazil and Vietnam. Ensure that you have all of your flight and hotel confirmations and email yourself copies of all of your travel documents as a precaution—should you lose your passport while on the road.

Insurance

Any reputable company provides insurance policies for all employees that travel. Make sure you not only know what you're covered for, but also ensure you have a copy of your insurance policy and the emergency contact number with you while traveling not only abroad but even out of the province. Government health plans don't cover everything and credit cards may provide some coverage, but often have limits on days, amounts and age.

Baggage

Find a suitcase that fits all airline carry-on requirements. Being able to travel with just a carry-on means no waiting at the baggage carousel and can save precious time, particularly on a short business trip. Don't forget that any liquids, gels and aerosols you take in your carry-on luggage must be in containers that hold 100 ml or less, and all of them must fit in one clear plastic re-sealable bag that is no more than 1 litre in capacity.

Currency

Be sure you have a clear understanding of your company policy in terms of meals and expenses. When it comes to carrying currency, credit cards are not only the safest method of payment, they are also the easiest for tracking expenses. Keep a spare credit card separate from your wallet in case of loss or theft and limit the amount of cash you carry. If you need to exchange currency, make sure you do so before you leave the country, as you'll usually get a better rate than if you were to exchange it at an airport or at an overseas currency exchange.

Phone

As a business traveler, you'll more than likely need to keep in touch while on the road. Find out what your company's phone provider offers in terms of overseas rates and check it against your expense policy. Roaming charges can quickly get out of hand without you realizing it, so turn off the roaming access and take advantage instead of Wi-Fi in your hotel. Another option is to get a local SIM card at your destination or to use Skype for free calls if you have access to the internet.

Dress/Etiquette

Even if you don't have meetings immediately after landing at your destination or if you're outside of regular work hours, make sure you dress professionally at all times. You're far more likely to be treated with respect, particularly as a young traveler, if you dress and act the part.

Loyalty Programs

Sign up for loyalty programs, whether it is with airlines, hotels or car rentals. Not only will you see instant value as soon as you sign up via member perks (i.e. free wi-fi, free upgrades, free breakfast), as you accumulate points you'll get rewarded even more for your loyalty with each flight or stay.

Use a Travel Agent

While many people believe they can get better pricing booking directly online, this is in fact rarely the case. A travel agent who has the ability to work with 'creative airfares' (i.e. Open Jaws, using different airlines not in the same alliance, etc.) is in a better position to manage your travel spending, and most importantly, is able to provide on-the-ground assistance any time of the day or night.

Keep these tips in mind when traveling for business and your career will be sure to "take flight." Bon Voyage!

Allison Wallace is the Director of Media & Communications for the Flight Centre Travel Group. Her passion for travel has taken her to more than 65 countries spanning six continents worldwide.

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Edmonton AB T5J 3L8 | Ph: (780) 616 5259 | Fax: (780) 433 9841 | Email: katrina.roldan@corporatetraveller.ca

Come fly with me

By Gitte Sorensen

An accounting designation is your ticket to the world. For these two Alberta accountants, their “ticket” has taken them around the globe, and they’re still far from their final destination.

“Congratulations! Today is your day. You’re off to Great Places! You’re off and away!” ~ Dr. Seuss



Alice Lee CMA, Australia

Travelling the world, finding true love and settling down in Australia sounds like a fairy-tale, but it's a true story for Alice Lee CMA, and it all started with an accounting designation. "When I began taking accounting courses in high school, I never would have imagined myself working for a large construction company in Australia," said Alice.

With a natural gift for numbers and a keen interest in business, Alice went straight into the Business Program at NAIT after finishing high school. Majoring in accounting led Alice down the CMA path, and she hasn't looked back since. What piqued Alice's interest in the CMA program was the management and teamwork aspect combined with learning the "soft skills" essential for today's business world. "With such a highly competitive business world, it is important for a company to find people who can help better and improve the company, not just do the books," said Alice. "I find this to be true not only in Canada, but internationally as well."

Although she didn't realize it at the time, Alice's international career started at age 20 when she accepted an entry-level accounting position with PCL Construction in Edmonton. While at PCL, Alice completed the CMA program and received her designation, which spawned her love of working in industry and at PCL. "I love being part of a project team, working with everyone from engineers, superintendents, quality coordinators, clients and then seeing the end result," says Alice.

During her first 10 years at PCL, Alice gained a wealth of knowledge while working on a variety of projects and sites that took her all over Alberta, Saskatchewan and into California and Arizona. After those 10 years, Alice took a one-year

sabbatical to travel the world—Europe, Asia, New Zealand and Australia. It was during the last leg of her adventure in Australia that she met (and fell in love with) a local Australian man. "I decided to follow my heart to see where it would lead me, and I handed in my resignation to PCL and stayed in Australia," said Alice. The adventure continued, as Alice spent the next few years traveling around Australia and working odd jobs—from a barmaid in a pub to a roustabout in a sheep-shearing shed—along the way. And that local man? Well, he is now her husband.

As fate would have it, out of the blue in January 2012, PCL Australia Operations asked Alice if she was interested in taking a position as an accounting manager for a new project (Victoria Comprehensive Cancer Centre) in Melbourne, as they were looking for someone with previous PCL experience. "My husband and I decided it would be a great opportunity, packed our bags and headed to the east coast," said Alice.

Alice's current role involves much more than just "basic accounting" work. As this is PCL's first project in Australia, Alice liaises with PCL's North American head office in Edmonton regarding human resources, immigration and training. Although the fundamentals are the same in accounting, there are different rules in every country and every day is a learn-

ing experience for Alice. "I try to attend as many courses/sessions that allow me to understand and learn more about the Australian legislation in all aspects, whether it's new immigration policies, international transfer pricing or changes in tax legislation," said Alice.

As for learning to live life down under, Alice has picked up a lot of cultural points from her husband, like learning to talk like a local to loving their local sports, Aussie Rules football and cricket.

A noticeable difference for Alice was the Australians' laid-back culture. "After living and working alongside Aussies, I've learned to relax more, and I'm much happier for learning to do so," said Alice. "Things still get done, but the balance between life and work seems much more reasonable here."

A big perk for Alice is the Australian weather. "Here in Australia we have beaches, sunshine and, at worst, rain in the winter," said Alice. Alice has also taken advantage of her close proximity to Southeast Asia, having explored many different cultures and countries there.

For now, this world traveler's feet are firmly planted in Australia, but who's to say she won't one day return to Canada. "To me, home isn't a physical place; it's wherever I am as long as my husband and son are with me."

Alice Lee CMA





“My knowledge has improved immensely. I never imagined it would be this strong or that I would enjoy accounting so much.”
—John Karvellas CA

John Karvellas CA

John Karvellas CA, Switzerland

John Karvellas' love affair with Europe started during university when he participated in a one-year exchange program at the Vienna University of Economics and Business in Austria. “I fell in love with the German language and living in Europe,” said John. After returning to Canada, John made it his mission to return to Europe after completing his education at the University of Alberta.

When John decided to pursue a Chartered Accountant (CA) designation, it wasn't so much his interest in numbers and business that held the allure, but more so the international appeal and mobility the designation offered. “My mom is a CGA so I was able to see the value of an accounting designation early on, and knew an accounting education would create many opportunities,” said John.

One of those opportunities came before John had even finished articling with Buchanan Barry & Company in Calgary. With his eagerness to find employment in Europe, John started applying for jobs abroad, specifically German-speaking countries, as soon as he passed the Uniform Final Evaluation (UFE). Almost by fluke, John stumbled into financial services and secured an accounting

position with Swiss Reinsurance Company in Zurich, Switzerland.

Starting his career in the financial services sector allowed John to find an area of accounting he was not only passionate about, but one he excelled in as well. For John, that was working on GAAP (Generally Accepted Accounting Principles) and IFRS (International Financial Reporting Standards). “I pursued a specialist path because I really enjoyed understanding actual GAAP and accounting, what the rules mean, and I've become an expert on very complicated transactions,” said John. “My knowledge has improved immensely. I never imagined it would be this strong or that I would enjoy accounting so much,” said John.

With his expertise in financial services and accounting policy, John's current position as Director of the Accounting Policies Group at Credit Suisse in Zurich is a perfect fit, and he recently celebrated his tenth anniversary with the bank. Since John handles complicated transactions and specialized accounting work, he admits he's the “big brain” when it comes to accounting issues.

While John does credit his accounting education and designation for his career success, he acknowledges that it's up to

you to make the most of the tools you are given—and he's certainly done so. “I am proud to be a CA, and I find that the Canadian accountants within my organization make up some of the best accounting staff we have,” said John. “Even in the areas of risk management and other key areas, some of the top senior management have an accounting designation.”

John travels to places like England and India to lecture in internal courses to train staff across his organization. Working for a global company and dealing with international clients and staff leads to a common challenge for John—time zone differences. “I support people in India, Singapore, the USA and the UK, and trying to set up conference calls with all three regions can be difficult,” said John. “You learn to develop a thick skin and prioritize your time accordingly.” As for the Swiss workplace culture, John finds it more formal and bureaucratic than in Canada, but says it's also dependent on the banking environment and personality of his colleagues.

After 14 years of living and working in Switzerland, John is pretty much a “local” and has mastered the German language. John worked hard during his year abroad at university to learn German and has built on that over the years. “I speak High German with a Swiss German accent, and I've worked hard to develop the appropriate German dialects,” said John. He also took it upon himself to learn Greek to connect with his Greek heritage.

Most of all, John enjoys the European lifestyle. “The proximity for traveling and fact that there are so many interesting places to visit is amazing,” said John. “Whether it's shopping in Germany or visiting my relatives in Greece, it's only a short trip away.” With the Alps as his backyard, John takes advantage of all the outdoors has to offer, which includes cycling, golfing and group fitness activities.

Although John is settled in Zurich, he's not closing any doors. “I've learned in life it's good not to have too many long-term plans and just take life day-by-day.”



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From East to West

A man with a beard, wearing a dark suit jacket over a blue checkered shirt, stands in a field of bright yellow flowers. The background is a clear blue sky with light clouds. The overall scene is bright and professional.

By Natasha Constantin

“Working with a very rapid growth entity, working on financing proposals, business plans, analyzing new growth opportunities and advising executive staff was all very exciting to me.”—Steve Latimer CA

Whether he's following his head or his heart, **Steve Latimer CA** knows his accounting designation won't be that far behind him. In fact, it's the very thing that's helped him get to where he needs to be.

Steve was born and raised on the east coast in Sydney, Nova Scotia. Prior to finishing his bachelor of commerce at Cape Breton University, Steve recalls a conversation with a trusted professor that changed his career path.

While discussing plans for post-graduation with his professor, Steve shared his plans of working at an engineering firm. He explained that he'd been spending his summers working as a construction technologist for a national firm and thought it might be a good career for him.

His professor recommended that he still consider a career in accounting—advice Steve seriously contemplated. Steve sent his resume to Grant Thornton, as per his professor's recommendation, and received an offer from Grant Thornton in New Glasgow, Nova Scotia, shortly thereafter.

It is likely that Steve's professor knew he was a suitable candidate for a career in accounting, as working in a public accounting firm proved to be something Steve thrived in. "I was part of a team of highly motivated and hardworking individuals," said Steve. "I had great certainty of my future career growth within the organization, and had tons of access to professional development opportunities."

After four years at Grant Thornton (two years in both New Glasgow and Halifax), Steve's life and career goals changed slightly. He and his wife longed to be closer to family and friends back in Cape Breton. Steve left public practice for a position in industry for Membertou First Nation—one of Canada's quickest developing Aboriginal communities. This role was a great fit for him, and somewhere he could easily use his Aboriginal finance experience, having worked on audits of other Aboriginal communities during his time in public practice.

Steve enjoyed many aspects of working in industry, "Working with a very rapid

growth entity, working on financing proposals, business plans, analyzing new growth opportunities and advising executive staff was all very exciting to me."

In August 2013, Steve and his wife made the decision to move out west to Alberta. His wife, Leah, was looking to find employment in a place where there were more job opportunities for young teachers.

Along with the provincial move, Steve was also considering a move back to public practice. "I wanted the ability to, again, meet and work for different clients and find ways to help them achieve their business goals," said Steve. "I was also looking for more of a 'coaching culture' where I could have a leadership role and get involved helping staff grow their careers."

Having left Grant Thornton on good terms, Steve contacted them to see if there were any job opportunities in Alberta. Steve was put in touch with the recruitment team at Grant Thornton's national office. After being asked if Steve would ever consider working in Wetaskiwin, Steve and his wife were on a plane one week later to meet with partners and staff.

Since the move out west, Steve has been settling into his role at Grant Thornton Wetaskiwin quite well, "I enjoy working at the Wetaskiwin office," said Steve. "It has a small office feel to it, but because Grant Thornton is a national firm, we're part of a larger network. We get to work quite closely with our Camrose and Edmonton offices."

While many aspects of moving from one province to another can be quite the headache, transferring his Nova Scotia CA designation to his Alberta CA designation was a seamless and easy transition. "If I remember correctly, it took about 15 minutes and I was able to do it all online. The Alberta Institute sent me a new certificate within a week," said Steve.

Whether it's the seamless mobility within the profession, from public practice to industry, or mobility within Canada, Steve is grateful for the flexibility his accounting designation has given him to follow any path his head or his heart desires. 

The accounting profession's Campus Ambassador team is here to assist you in becoming informed about the Alberta accounting profession. The following ambassadors will be a primary point of contact for students to get information about the path towards their accounting designation, as well as important events and activities.

The Campus Ambassadors



Madison Banks
Mount Royal University
Ambassador
mbanks@albertaaccountants.org

Why were you interested in becoming a Campus Ambassador?

I was interested in becoming a Campus Ambassador so I could provide interested candidates with valuable information about the designation and ensure the distribution of accurate information.

Why have you chosen to pursue a career in accounting?

The main reason I chose the accounting career path is because I see the rewarding life my mother lives as a Chartered Accountant. Throughout my childhood, I was exposed to seeing how her work challenged her yet provided complete fulfillment—something I look for in everything that I do, so naturally I gravitated to a career in accounting.

If you could visit any place in the world, where would you go and why?

If I could visit any place in the world, it would be Madagascar. I've always had a fascination with the country! It seems to have many hidden treasures such as the wildlife, local culture, and vast geography that I hope to experience firsthand one day.



Lauren Gallimore
University of Lethbridge
Ambassador
lgallimore@albertaaccountants.org

Why have you chosen to pursue a career in accounting?

My dad, Dean Gallimore FCA, was a partner at an accounting firm so I have always been exposed to it. However, it wasn't until I took a few accounting classes myself that I realized it was the right career path for me as well.

If you could visit any place in the world, where would you go and why?

I love to travel. I just booked my dream trip for next summer where I will visit many places on my travel bucket list. This trip includes a safari around Kenya and Tanzania, as well as stops in Dubai, India, Thailand and Singapore.

What is one fun fact about you?

I love the mountains and all outdoor activities associated with them! I spend as much time as possible at my family's cabin where I can ski, hike and kayak.



Maxim Beaulieu
SAIT
Ambassador
mbeaulieu@albertaaccountants.org

Why were you interested in becoming a Campus Ambassador?

I believe an accounting designation offers tremendous value in terms of skills and opportunities for accounting professionals. I wanted to be able to inform students of those benefits. Being an ambassador is a great way to inform and assist students with their future career goals.

If you could visit any place in the world, where would you go and why?

I would like to visit India. The food is just amazing and the culture is so rich and diverse.

What is one fun fact about you?

I have been to every province in Canada at least once (but no territories yet).



Nanci-jean Franks
NAIT
Ambassador
nfranks@albertaaccountants.org

Why have you chosen to pursue a career in accounting?

I chose to pursue a career in accounting because of the number of opportunities the profession has to offer. I love variety and trying different things.

If you could visit any place in the world, where would you go and why?

If I could go anywhere in the world, it would have to be Italy because of the diverse cultures within the country. Not to mention fashion, art, language, and of course the wine!

What is one fun fact about you?

A fun fact about me is that I have a degree in Art and Design from the University of Alberta, as well as a diploma in Hair Design from Marvel College. I can do your taxes and your hair, too!

*Each of the 2014/15 Campus Ambassadors are in
if you see them on campus, don't be afraid to say,*

“HELLO”

ssadors



Rachel Zhang

University of Alberta
Ambassador
yzhang@albertaaccountants.org

Why were you interested in becoming a Campus Ambassador?

I wanted to become more involved in the AAUA events and learn more about how the CPA Professional Education Program is different from the legacy education programs.

Why have you chosen to pursue a career in accounting?

Accounting majors get jobs. I chose accounting because I think it is the foundation of business. If you are good at accounting, you can do many things later on in your career.

What is one fun fact about you?

I dislike carrots!



Tan Giang

University of Lethbridge
(Calgary Campus) Ambassador
tgiang@albertaaccountants.org

Why were you interested in becoming a Campus Ambassador?

I have always been interested in becoming a Campus Ambassador. By taking on this role, I am able to represent the accounting profession on campus at the University of Lethbridge and encourage fellow students to pursue a career in accounting. My goal is to reach out to students to provide them with information about social events, networking opportunities, and the benefits of pursuing an accounting designation.

If you could visit any place in the world, where would you go and why?

There are many beautiful places to travel around the world such as Taipei, Dublin, and Stockholm, but if I could visit any place it would be Area 51 in Nevada. I would be interested to know why the facility is heavily guarded and why the government never discloses any information about it.

What is one fun fact about you?

I am a mentor with the Big Brother Big Sister Foundation and my mentee is a 10-year-old-boy named Elijah. Our common interests are: sports, cars, and travelling.



Abbey Kind

University of Calgary
Ambassador
akind@albertaaccountants.org

Why were you interested in becoming a Campus Ambassador?

I really enjoy mentoring students through my role as an Academic Director in my school's Accounting Students' Association. I was looking for the opportunity to reach out to a greater number of students.

Why have you chosen to pursue a career in accounting?

I chose to pursue an accounting career because I believe it is an interesting and challenging field that offers endless opportunities. Accountants gain the knowledge and experience necessary to pursue a career in any industry they choose and can make a real impact on their clients and their community.

If you could visit any place in the world, where would you go and why?

If I could visit any place in the world, I would travel to Italy. My Grandfather was from a small town in northern Italy and it is a place I have always wanted to visit.



Eric Lajczak

MacEwan University
Ambassador
elajczak@albertaaccounts.org

Why were you interested in becoming a Campus Ambassador?

This is my second year as a Campus Ambassador. It has been a wonderful experience and opened many doors for me. I had the pleasure to become acquainted with some very successful people. This past March, I sat at a table with David Chilton and picked his brain during a dinner the AAUA/ICAA sponsored.

Why have you chosen to pursue a career in accounting?

I really enjoyed the introductory classes and found that I was actually quite good at it. Despite the accounting stereotype that exists, I have noticed there is a lot more to accounting than debits and credits and we do have personalities (I promise). It can actually be quite exciting at times!

If you could visit any place in the world, where would you go and why?

I love to travel and have been to most of Europe; however, I would really like to explore the Middle East. I enjoy the culture and am fascinated by it as well. Many people have spoken of its beauty and wonderful history, and I would love to experience it.

introduced above—

“hi!”



Athabasca University Business Students

Crack the Case

Congratulations to Athabasca University business students, Clayton Reeder, Corrina Green, Bonita Arbeau and Charles Gallucci on their first place finish in the Alberta Accountants Unification Agency Board Governance Case Competition.

Now in its sixth year, this unique competition saw 15 teams from post-secondary institutions across the province take learning to the next level. With only six and a half hours to analyze a governance case and present recommendations to some of Alberta's most prominent business leaders, these business students took an innovative approach that paid off.

This is yet another example of how our business students are making their mark on the world.



BUSINESS.ATHABASCAU.CA

Bringing home a career souvenir

By Chris Pilger



Working internationally brings many benefits to those who experience it, from exposure to new ideas and cultures to making global connections. For **Lisa Costello CA**, it also provided the motivation to become an entrepreneur.

Lisa is the CEO of Neal's Yard Remedies Canada, a company whose products she first discovered while working in London, England. The company is a retailer of organic health and beauty products, and places value on the social and environmental costs of the ingredients—all products are manufactured by hand in England using sustainably sourced, certified organic ingredients. "I was working at Ernst & Young in Calgary, and the opportunity arose to take a position with the firm in London. There was a Neal's Yard store close to my flat. I had started to become more aware of the harmful ingredients that are found in many products, and I was really looking for somewhere to shop that I could be confident in and feel

good about. I fell in love with the Neal's Yard products, ethics, and brand." Upon her return to Calgary in 2012, Lisa found she was unable to find a comparable, one-stop shop for similar products. Seeing a market opportunity, Lisa cold-called the company, and eventually was granted the Canadian market rights.

Becoming an entrepreneur is a risk Lisa may not have taken without both her accounting designation and the experience she received and skills she developed working overseas. "I worked in London for three years, and it was one of the best things I have ever done," Lisa explains. "You learn so much about yourself, about how to problem-solve on your own without your normal support structures, and you are exposed to so many different approaches and perspectives." As a professional accountant, Lisa felt she had the business and financial background to take a calculated risk. "My background has taught me how to run a business. My life is now a case study," Lisa laughs.

She is also thrilled to work with and have the support of her family in this new venture. Ironically, many of those family members are also CAs, including her father, Larry Shelley, who serves as the chair of the company, and her husband James. "My husband is a total sounding board for me—his support and ideas are definitely invaluable." Lisa's mother and sister have also been extremely involved in the venture.

The family's hard work has paid off, with the first Canadian Neal's Yard Remedies store having opened in Calgary. However, according to Lisa, that is only the beginning. "Where would I like to see the company go? I would love to see us have 30 locations across the country, and be the first stop for people looking to pick up products they can trust. I strongly believe we can accomplish that. I never imagined myself running a cosmetics business, but it's certainly been a fun road so far, and I am excited for the next steps!"



“You’ll be on your way up! You’ll be seeing great sights! You’ll join the high fliers who soar to high heights.” ~ Dr. Seuss

Reaching

By Gitte Sorensen



the top

Climbing the corporate ladder is easier said than done. Reaching executive-level positions takes perseverance, dedication and a lot of hard work (an accounting designation doesn't hurt either). While everyone has their own story, it's almost certain that every path to success is paved with challenges, successes and often a few surprises along the way.



Vik Dhalla CMA, Director of Revenue Management, Tervita

A surprise for **Vik Dhalla CMA** came when he realized that his science degree was not getting him exactly where he wanted to be. After considering his options and educating himself on what a career in business would entail, Vik decided to return to the University of Manitoba to complete a Bachelor of Commerce degree. “Accounting didn’t seem exciting to me at the time, so I chose finance as my major,” said Vik.

Vik’s finance career began at the Canadian Tire Corporation in Toronto. Through a conversation with his manager at the time (who happened to be a CMA), Vik started thinking about an accounting designation. “My manager suggested that if I wanted to advance my career, I would need a designation behind my name,” said Vik. “I did some research and found that the CMA designation brought a good blend of accounting, education, group dynamic and strategic leadership, which was a good fit for me.”

While his career began at Canadian Tire, it was his new role at Arrow Electronics, combined with his CMA designation, that molded him into the business professional he wanted to be. During his five years with Arrow Electronics, a US Fortune 150 company providing technology solutions to various markets, Vik moved up the ranks. Vik’s title and responsibilities changed from Finance Manager in the Toronto office to Director of Finance for worldwide financial planning and analysis in Denver, Colorado.

“The bar has been raised in the accounting and business community as a whole...Accounting designations are respected and bring a well-rounded skillset with them, and that’s what employers are looking for.”—Vik Dhalla CMA

Vik knows his accounting designation has opened many doors for him. He firmly believes a designation is needed to enhance a career in today’s business workplace. “The bar has been raised in the accounting and business community as a whole,” said Vik. “Accounting designations are respected and bring a well-rounded skillset with them, and that’s what employers are looking for.”

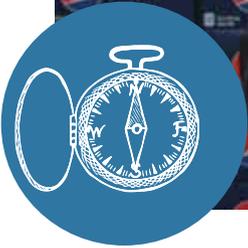
Since February 2013, Vik has been Director of Revenue Management for Tervita, an environmental services company involved in the energy industry headquartered in Calgary. Leaving Arrow Electronics was tough for Vik, “I loved the job. I travelled to cool places around the world—including Wall Street.” But he had to put his family first. “After the shooting incident at the Colorado movie theatre, my wife wanted to move back to Canada. Since I had always imagined a career in oil and gas, off to Calgary we went,” said Vik.

As a director at Tervita, Vik manages the processes and systems across three departments: centralized invoicing, credit and collections, and cash applications. With his IT industry background, Vik is able to blend his knowledge of technol-

ogy with his accounting skills to help Tervita grow. “I have a background in e-commerce and enjoy finding e-commerce solutions to fit my company,” said Vik. “A lot of exciting things are happening in the oil and gas industry, and it’s great to be a part of that.”

Vik credits a number of factors to his career progression. He believes finding good mentors and coaches is equally as important as networking and showcasing your talents to interested companies. “You also learn a lot through professional development,” said Vik. “There are many ways to add value on behalf of your employer. When you do, they appreciate it, and you’ll see the rewards.”

It’s Vik’s love for change and new challenges that’s led to his success. “The business environment is always fluid, and it’s important to be flexible, focused and adaptable, as this will help you navigate through whatever comes your way,” said Vik. A memorable time for Vik was actually during the recession and credit crisis in 2008. Being able to react to the downturn in business is where Vik’s accounting and finance skills really came into play. “I was able to provide coaching



Neil Antymis CGA, Director of Government Affairs, PepsiCo Beverages Canada

Neil Antymis CGA loves his career. An accountant for nearly 30 years, Neil has spent the past 25 years blending his business skills with his passion for environmental sustainability working for PepsiCo Beverages Canada. Even from a young age, Neil had the accounting bug. “I was always good with numbers and accounting was my first career choice,” said Neil. “My brother-in-law is a CA and he had a very positive influence on me growing up.”

Neil’s accounting career began at Red River Community College in Winnipeg, where he completed a business administration diploma. At that time, making the move to Alberta was the best choice for Neil’s career. “I thought the oil patch offered more opportunity than anything else at the time,” said Neil.

His move paid off—big time. Arriving in Calgary in the late stages of an economic boom, Neil quickly found work with Turbo Resources Ltd., a western-based integrated oil and gas company. During his eight years at Turbo, Neil worked in various positions and divisions while

concurrently completing his CGA designation. “Only a few days after I started at Turbo, Calgary was awarded the 1988 Winter Olympics, and it was one of Turbo’s VPs who was instrumental in bring the Olympics to Calgary,” said Neil. “It all seemed to confirm I had made the right decision.”

Since moving to PepsiCo Beverages Canada in 1989, Neil has been moving up the ranks and currently sits as Director of Government Affairs. He deals with regulatory changes affecting the beverage industry and spends a significant portion of his time working with various beverage container recycling programs.

Additionally, Neil serves on the board of the Canadian Beverage Association, as well as several organizations responsible for improving beverage container recycling. “In the early years I worked in more of the traditional accounting and finance roles, and for the last 10 years I’ve worked in a leadership capacity,” said Neil. “I’ve leveraged my designation every step of the way.”

The opportunity to work with and learn from great people throughout his career has been an invaluable experience for Neil. Working on various management teams where it was critical to deliver results has instilled a hard work ethic in Neil. “When it was tough to get results, you worked twice as hard and did whatever you could to support the team,” said Neil. “Learning to manage expectations and delivering on commitments was the key to my success.”

Neil explains that keeping up with the trends, from technology to professional development, is a necessity in advancing your career. “I recently completed the Institute of Corporate Directors certification program, which is very beneficial in my current role,” said Neil. “And I still remember the first time I sat down at a computer with a program called VisiCalc, the first-ever spreadsheet computer program. We’ve come a long way with technology, and it’s vital to keep your skills up-to-date.”

With a solid accounting career under his belt, Neil has some wise words for the up-and-comers in the business and accounting world. “Integrity and trust are everything, and you need to live up to your commitments. When managers know they can count on you consistently, your career will naturally advance.”

Along with learning to communicate effectively, Neil stresses the importance of providing insights and finding ways to add value to your organization. “As an expert in a certain area, you are in the best position to make significant contributions and provide unique insights to your team,” said Neil. “Senior executives need this from you, and they take notice when employees take that initiative.”

Reflecting on his career, Neil has no major regrets. He defines his career success as finding job satisfaction and adding value in everything he does. “Working with the provincial recycling organizations, I feel great about improving recycling programs and recovery rates in Canada for the benefit of the environment,” said Neil.

Although he plans on retiring in a few years, Neil already has ideas on how to keep busy. “I would like to continue leveraging my accounting and director designations to serve on the boards of organizations that will help improve our communities and environment.”

“As an expert in a certain area, you are in the best position to make significant contributions and provide unique insights to your team”—Neil Antymis CGA

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Calgary Advantage Dinner
October 9, 2014
5:30pm-9:00pm
Hotel Arts
119 12th Avenue SW

Edmonton Advantage Dinner
October 21, 2014
5:30pm-9:00pm
Fairmont MacDonald
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albertaaccountants.org/advantagedinners



Landing on new opportunity

By Magdalena Matracki



Benedict Dy **CGA** remembers a cold winter evening when he questioned his move to Canada. Edmonton's winters are a challenge for even the seasoned Canadian, and Benedict just traded in the warm tropics of the Philippines for the hope of a better future in Canada.

Shivering on a bus stop bench in below-zero temperatures, he mused on his predicament. He considered the things he left back home: a promising career at a large multinational company, his Filipino Certified Public Accountant (CPA) designation and his Bachelor of Commerce degree—credentials not fully recognized in Canada. Despite his experience and education, Benedict was struggling to

find an accounting job. "In those first few months, I admit I contemplated whether I had it in me to start my studies and career all over again," said Benedict, who is now the Director of Financial Operations for Innovation and Advanced Education with the Alberta Government.

Things started looking up when Benedict landed a job as a cashier in a computer store. After telling his manager of his accounting background and desire to work in the field, he was given the opportunity to take on an accounting position that opened up a short time after he started. This was a great start, but he knew he had some work to do if he wanted to advance his career.

Benedict's story is reminiscent of many internationally trained professionals who immigrate to Canada.

“Only a small percentage of newcomers are able to recertify and obtain their Canadian professional accounting designation...many are discouraged because recertifying requires significant cost, time and effort. It took me four years of part-time studies while working full-time to obtain my CGA designation.” —Benedict Dy CGA

Like many newcomers, adjusting to the Canadian workplace was challenging for Benedict. Although technical aspects of accounting are similar between Canada and the Philippines, workplace culture and practices are very different. “In the

Philippines, we tend to place a stronger focus on internal controls due to higher risks in our business environment,” said Benedict. “The workplace is more casual and often mixed with personal, social and even religious activities.” While Benedict has spoken English his whole life, it took a few years to grasp Canadian English and slang.

Balancing his studies between family and work obligations, Benedict enrolled in the NAIT Accelerated Accounting Program in conjunction with the CGA program and earned his designation in 1999. “I remember that phone call I got from CGA Alberta congratulating me for passing my last exam. I was so happy,” he said.

A passionate learner, Benedict pursued further studies and received his MBA from Laurentian University as well as management certificates from the University of Alberta.

Studies complete, Benedict decided his experience could help students and

newcomers to Canada. In addition to his job with the Government of Alberta, he teaches accounting at MacEwan University and volunteers at student events where he shares his experience with students and new immigrants. “I advise them to network and seek support from agencies helping new immigrants, professional associations and other professionals who've been there before,” said Benedict. “Don't be afraid to take entry level jobs—gaining related Canadian work experience is invaluable.”

Looking at Benedict's successful career, you wouldn't realize the struggles he faced as a new immigrant. He now enjoys a prosperous career allowing for a great balance of work, family, volunteering and the occasional round of competitive table tennis with his friends. Does he have second thoughts about leaving the Philippines? “It's been 20 years and we are very fortunate and grateful for the good life we have, but I still can't get used to the cold weather.”

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The CPA Certification Program: What Students Need to Know

The CPA Certification Program, which consists of education, practical experience, and final evaluation, is designed to combine the strengths of each of the legacy (CA, CMA, CGA) body's certification practices.

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, required prerequisite courses, as defined by the specific subject area coverage in the CPA Competency Map, must be successfully completed.

Prerequisite listings for each of these post-secondary institutions are available online at www.albertaaccountants.org/Become-a-CPA/Subject-Area-Coverage.

Bridging into the CPA Professional Education Program

Provisions are in place for students who were on track to complete their undergraduate degree prior to the release of the CPA prerequisite requirements. The CPA profession has prepared a transitional bridging program, which will allow these students to complete the necessary course requirements in a streamlined fashion.

Module Zero

Students who had previously considered a career as a CA, CGA or CMA—and, therefore, meet the entry requirements for one of these legacy programs—are able to enroll in Module Zero. Module Zero ensures that students' entry into the accounting profession is not delayed due to the transition to the CPA profession.

As the entry requirements for the CPA Professional Education Program cover additional competencies than those required for the legacy programs, Module Zero has been designed to help program entrants who have met legacy prerequisite course requirements fill knowledge gaps before starting Core Module 1.

In Module Zero, students assess which topics they are required to complete. They have access to all the course materials online and self-evaluate each topic upon its completion. Mod Zero is available for students in the months prior to beginning the first module of CPA Professional Education Program.

CPA Prerequisite Education Program (CPA PREP)

CPA PREP is designed for those who have an undergraduate degree in a discipline other than accounting and are missing some or all of the prerequisite courses required for admission to the CPA Professional Education Program (CPA PEP).

CPA PREP may also be relevant to career changers, and new Canadians wishing to start a career in accounting. CPA PREP is nationally developed and delivered on a part-time basis. To ensure maximum flexibility and accessibility, the program has been developed using a blended learning model combining online learning, self-study, and classroom learning.

CPA Professional Education Program (CPA PEP)

The CPA Professional Education Program (PEP) includes six modules designed to develop six technical competencies and five enabling competencies. While offered on a regional or provincial basis, the program has been developed nationally.

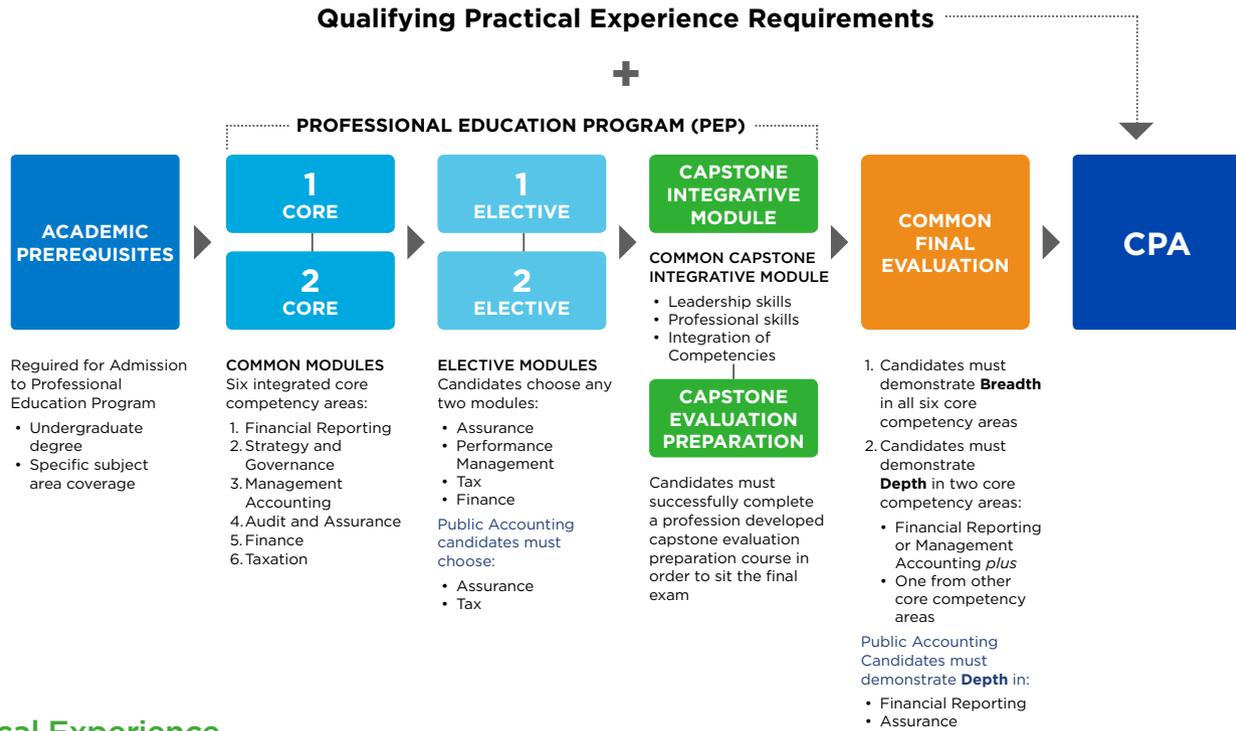
CPA PEP is a graduate-level program which is delivered part-time over two years. CPA candidates will take the program while simultaneously being employed in a relevant position. For candidates, their CPA PEP education coupled with practical experience will complement the development of CPA competencies.

Designed using a blended learning model, CPA PEP will combine online learning, self-study, classroom learning and teamwork to enable CPA candidates to develop the competencies expected of Canada's pre-eminent professional accountants.

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

- **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 will be offered: assurance, performance management, tax and finance. All candidates must choose two, and 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.

CPA PROFESSIONAL EDUCATION PROGRAM OVERVIEW



Practical Experience

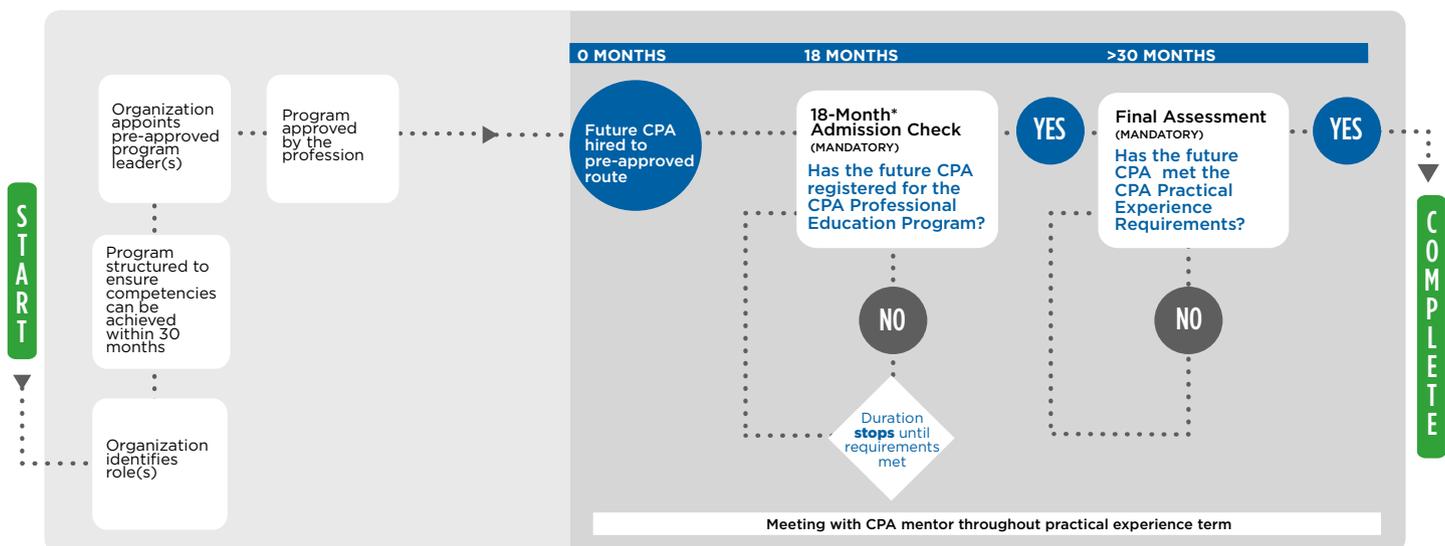
In addition to formal education, candidates are required to complete a term of relevant practical experience. The knowledge and competencies gained through practical experience complement those developed through education.

All students will require a minimum of 30 months of practical experience. Practical Experience will be gained through the pre-approved or experience verification route.

Pre-Approved Route:
Pre-approved programs in which CPAs candidates gain relevant experience in training positions pre-approved by the profession:

- Employers offering these programs have had them approved by the profession in advance. The programs have been designed to provide CPA candidates all the required experience within 30 months.
- Assessment by the profession occurs when you complete the program.

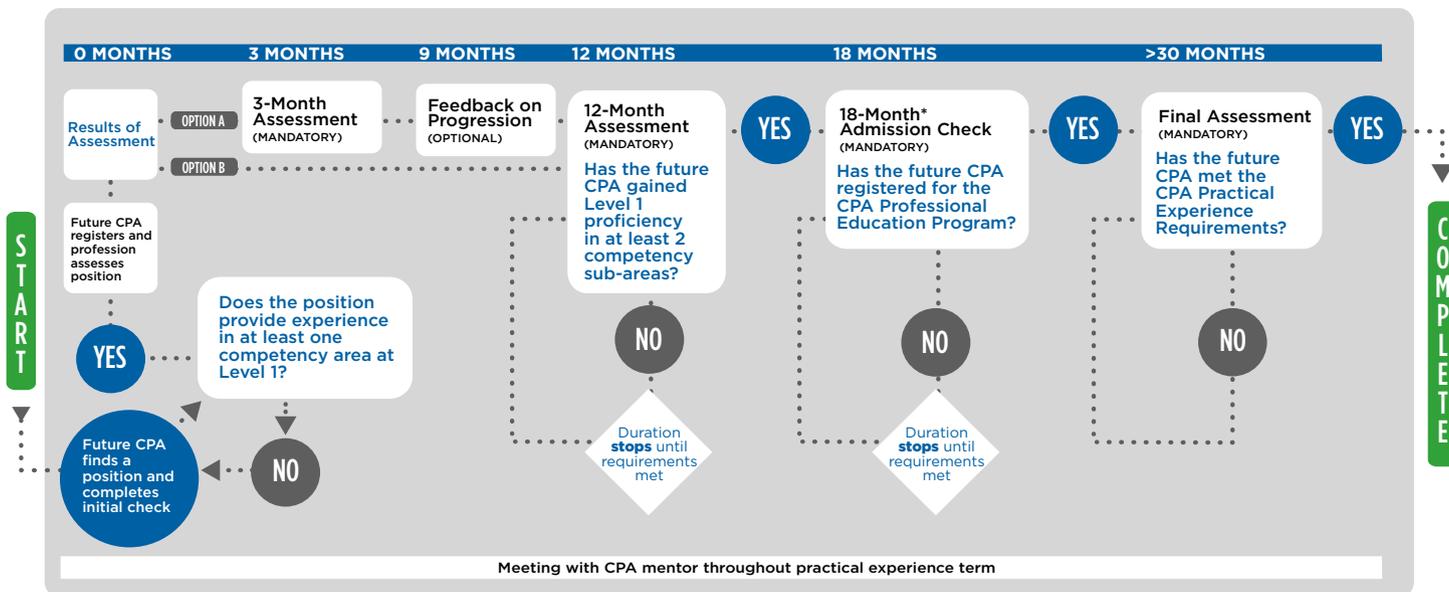
OVERVIEW OF THE PRE-APPROVED ROUTE



*This experience can be any combination of full-time, part-time or co-operation experience but no more than 12 months will be recognized as prior experience. If the future CPA is reporting experience as they gain it, then they require a CPA mentor. If the experience is being reported as prior experience, capped at 12 months, then no mentor is required for the period of prior experience.

Experience Verification Route:
 Experience verification in which CPA candidates demonstrate relevant experience at an employer of choice that has not been pre-approved by the profession.
 This flexible route allows CPA candidates to demonstrate competence and have relevant experience recognized, as it is gained, at the employer of choice.
 CPA candidates complete detailed experience reports that are assessed by the profession at key milestones. Supervisors review and attest to the accuracy of experience reports.

OVERVIEW OF THE EXPERIENCE VERIFICATION ROUTE



*This experience can be any combination of full-time, part-time or co-operation experience but no more than 12 months will be recognized as prior experience. If the future CPA is reporting experience as they gain it, then they require a CPA mentor. If the experience is being reported as prior experience, capped at 12 months, then no mentor is required for the period of prior experience.

*For more information on proficiency levels and competency sub-areas, please refer to the CPA Practical Experience Competency Requirements document at: www.albertaaccountants.org/Become-a-CPA/Practical-Experience/Students-and-Candidates.

*Practical experience requirements for the practice of Public Accounting are recognized separately from practical experience requirements for certification. Experience requirements for public accounting are currently being developed. Additional information is expected by the end of 2014. Legacy public accounting experience requirements remain effective until the new standards come into effect.

CPA Mentorship

Mentorship is a mandatory component of the CPA practical experience requirements. Recognition may be given for a total of up to 12 months of experience earned prior to registering with the profession. After that time, all the qualifying period of practical experience cannot begin until CPA students/candidates have a CPA mentor. CPA candidates who registered and started employment prior to September 1, 2014, may continue to complete legacy experience (only applicable if they have already begun reporting under a legacy reporting system), or may choose to transition to the CPA PER.

CPA candidates who work in a CPA pre-approved program will be matched with a CPA mentor by the organization that offers the program. CPA candidates who choose experience verification are required to seek out their own CPA mentor in order to find a successful fit. Contact your provincial/regional body for information and resources on how to find a mentor.

Common Final Evaluation

All candidates must write the Common Final Examination (CFE) to complete the CPA Professional Education Program. The CFE will challenge candidates to demonstrate their competence by responding to simulations and business scenarios representing the kinds of challenges they have faced during their work experience, or will soon be facing in their professional career. Regardless of their selected elective modules, all candidates will write the same CFE.

For more information on your path towards your accounting designation, visit: www.albertaaccountants.org/become-a-CPA.

Registration into CPA PEP
 Students are encouraged to apply for conditional acceptance into the CPA PEP program prior to the completion of their required courses and degree.

Registration deadlines
 November 24, 2014: January 2015 intake into CPA PEP Core Module 1
 March 3, 2015: May 2015 intake into CPA PEP Core Module 1



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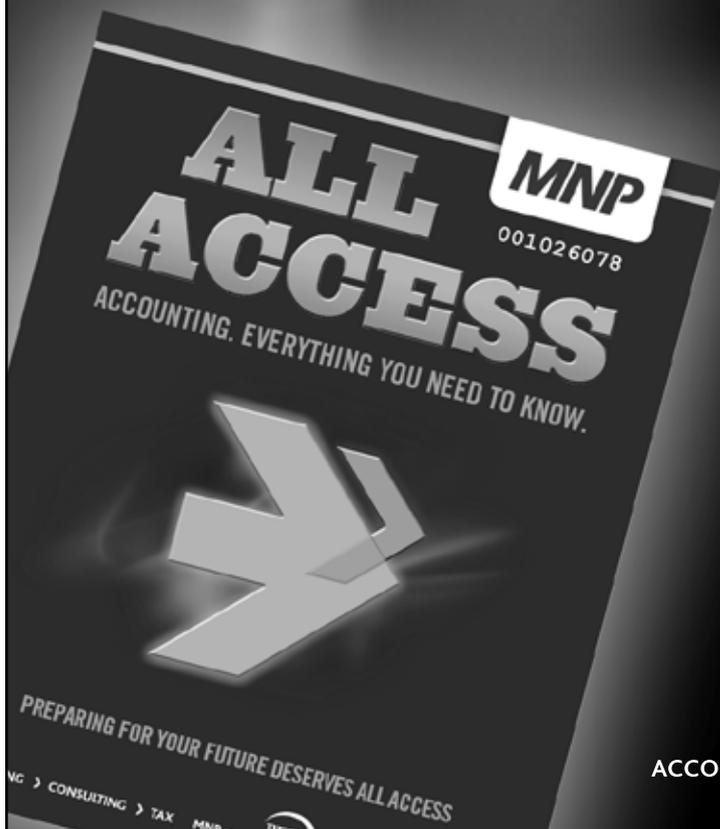
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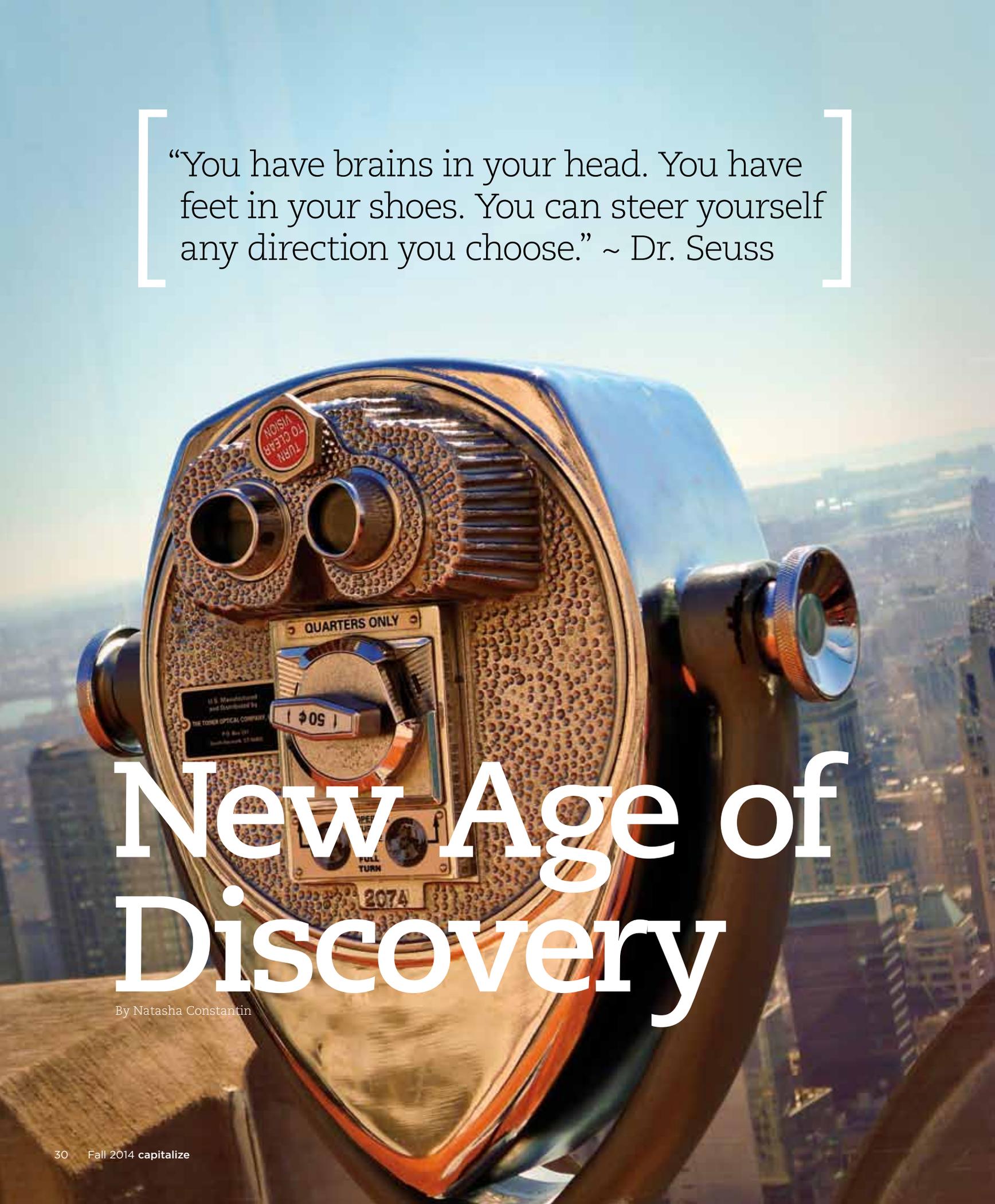


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“You have brains in your head. You have feet in your shoes. You can steer yourself any direction you choose.” ~ Dr. Seuss



New Age of Discovery

By Natasha Constantin

While some may use the term “guinea-pigs” to describe the first group of students going through the brand new CPA Professional Education Program (PEP), we prefer to think of them as “pioneers of a new age.”

Meet the following three individuals, who are all registered in the CPA PEP program, who are all completing their practical experience requirements, and who are all determined to become designated professional accountants in the new unified world.

By hearing from these three candidates, you’ll learn more about how they secured employment for their practical experience requirements, how they decided between the pre-approved route and the experience verification route, and how they balance life between work and the CPA PEP program.

For a little more context on the path towards your accounting designation, please refer to page 26.

At first, **Lucas Hansen** wasn’t entirely sure what he wanted to do with his career. With a knack for working with numbers, and both parents professionally designated accountants, it seemed that accounting might just be the perfect fit. To properly determine whether or not this would be the path he’d pursue, Lucas took on his very first accounting role as a summer student at Kingston Ross Pasnak (KRP), a public accounting firm in Edmonton.

After his summer experience, Lucas would highly recommend a co-op or summer position to students considering their future. “The summer position really benefited me when I went back to school. A lot of what I learned at work directly related back to my accounting courses in university,” said Lucas. “I felt it gave me a bit of an edge and a clearer indication of what I wanted out of my career.”

Lucas finished his commerce degree at MacEwan University with his sights on getting an accounting designation through training in public practice. “I wanted to train in public practice because I enjoyed financial accounting more so than managerial accounting,” said Lucas. “It’s also a great place to learn about various types of industries and businesses. You develop knowledge in many areas that will be helpful further down the road.”

In the fall of 2013, Lucas returned to KRP as a full-time accounting student. “I really enjoy the team-based culture of KRP. There is always help and support with any accounting challenges,” said Lucas. “Whether it is partners, managers or senior-accountants, there is always someone to turn to for help when it’s needed.”

Since KRP is a pre-approved training office under the new CPA practical experience requirements, Lucas felt like he was in good hands completing his training and education with them. “KRP has many years of experience putting students through modular based learning,” said Lucas. “They put students through a rotation that will expose them to many aspects of accounting. All of this experience you get through your practical experience is beneficial as it relates back to what you are learning in your modules.”

Keeping an open mind, Lucas was excited about the unified world of accounting and the new CPA PEP program. “I don’t feel that my training position has been affected at all since unification,” said Lucas. “I’ve spent a lot of time in an office with current CASB students, and everyone feels the new CPA PEP program is quite similar to CASB. You work during the day, then study and work on your assignments at night.”

In order to make the right choice about a potential employer, Lucas suggests you do your homework first. “Make sure you talk with people at each office about the culture, environment and type of work you might get to do. It is a good idea to get some background on these in order to see if that employer is the right fit for you.”



Lucas Hansen

Taking on a new path, leaving Russia and her career in corporate law behind, **Galina Mezibroski** moved to Canada with aspirations of a new career in accounting.

After completing her accounting prerequisite courses through the CA Bridging program at the University of Lethbridge in Calgary, Galina learned she would now be entering the new CPA Professional Education Program (PEP). "I was excited. I knew that CPA PEP would combine the best education practices from the previous accounting designation programs, and give equal recognition to graduates among industries and services."

Considering the various routes she could take towards her accounting career, Galina chose to follow a career path to working in industry. "Working in industry for a particular company is more interesting to me because I can become more personally involved in the business process long-term," said Galina. "I can directly see how my professional skills and expertise help to successfully develop and govern the business."

Galina felt that the experience verification route would be the path best suited to meet her long-term career goals of working in industry. "I think the experience verification route has a little more flexibility with regards to selecting a specific employer and various industries you may want to work in," said Galina. "If someone really wanted to train with a specific employer that is not a pre-approved training office, they still have the opportunity with the experience verification route."

To find her future employer, Galina began her job search on websites like Workopolis, LinkedIn, Indeed, Edmontonjobshop and Kijiji. "I also posted my advertisements on Kijiji and Edmontonjobshop and that's how Great Cookies by George came to find me," said Galina. After going through the interview process, Galina was offered the job at their head office in Edmonton.

Working for Great Cookies by George has proven to be a great fit for Galina. "The people are amazing, the quality of our product and customer service is remark-

able, and it's a company that brings people joy," said Galina.

Galina is adjusting to life as a full-time employee and CPA PEP student. "CPA PEP is quite different from university study patterns because there are no prescribed readings," said Galina. "You rely on your research skills and the knowledge that you acquired prior to entering the program."

Being part of the new education program has been a learning process for everyone, and Galina knows she can trust her CPA PEP facilitators to help her out if she needs it. "Facilitators feedback and revisions on assignments fill any important knowledge gaps and have helped build my skills on writing cases," said Galina. "They are very helpful."

From moving to Canada, continuing her education, finding employment and entering into a brand new education, Galina is not one to shy away from a challenge to accomplish her career goals. "A student should follow his or her future career goals while understanding that a significant amount of effort is required towards their work and studies," said Galina. "Once you realize where you want to see yourself, the path to getting there will appear to you."

After doing his homework, **Nakul Arora** realized that a career in accounting would unlock many doors and endless opportunities for him. Career options in accounting are extremely vast and can range from working in public practice, to pursuing a career in finance or corporate management, working in various industries, or becoming an entrepreneur.

Once Nakul learned about the experience and opportunities that public practice could offer, he made the decision to train there. "I believe that the biggest advantage is the magnitude of clientele that you can work with in public practice," said Nakul.

As many public accounting firms are approved training offices, Nakul went through the traditional recruiting cycle to find employment in that training route. During the months of September and October, the majority of approved training offices hire the bulk of their students a year prior to the start-date of the student's employment. Approved training offices are active in recruiting students



Galina Mezibroski



Nakul Arora

at on-campus events, wine and cheese networking, and career fairs. Students can attend these events and employer information sessions to learn more about the options available to them. “It was definitely a challenge going through the recruitment cycle as a student in my fourth year of university, with midterms going on at the same time,” said Nakul. “But I would highly recommend anyone going through recruitment to learn about the different employers and the potential opportunities by attending as many events as possible.”

When Nakul attended a Deloitte information session, he was highly impressed by the caliber and the welcoming nature of the people at the firm. “I believe it’s the people, reputation in the marketplace and the culture that makes an employer what it is, as well as their portfolio of clients.” Knowing the experience he could gain, Nakul was ecstatic to accept a full-time position as an accounting student at Deloitte in Edmonton.

Taking the plunge from student to professional can be nerve-racking. “I was so intimidated by the fact that I was no longer a student and had to transition into a working professional,” said Nakul, who was up for the challenge. “I worked hard to meet my deadlines and deliverables and took on extra work to showcase my ability to learn and grow.”

Now, finding balance in his life between work, CPA PEP modules, and his family and friends, Nakul recommends developing an organized schedule. “I had to manage my priorities by giving up some of my downtime to devote it to the CPA PEP program,” said Nakul. “With time, my new schedule became the norm. I still meet my responsibilities towards my family and friends. To succeed, it’s extremely crucial to utilize your time effectively.”

Looking back on his year training in public practice, Nakul wouldn’t change a single thing. “I’ve worked for multiple clients in the manufacturing, non-profit, oil and gas, entertainment and many other industries. I’m happy with the path I took to propel my career at Deloitte.”

How do I choose?

Change can bring uncertainty, and the transition to the new unified accounting profession is no different. For those entering the CPA Professional Education Program, it’s natural to have questions about the academic and work experience portions of the program. One question that Career Services advisors hear regularly is, “Should I choose the experience verification route or the pre-approved route for work experience, and how will this affect my job search?”

One appeal of the pre-approved route is that the employer’s work rotation has been assessed and recognized as meeting the competency requirements for the designation, and for many candidates this is an attractive option. That said, CMA and CGA candidates have for years been successful through the experience verification route; they self-assess performance on competency reports with sign-off from supervisors, and work with those same supervisors to ensure that job assignments and projects fulfill competency requirements. Whichever route is taken, CPA PEP candidates can be equally successful.

Choosing between experience verification and pre-approved route first and then basing job search efforts on that choice is a bit like putting the cart before the horse, and may end up limiting your employment options.

With two training paths available through the CPA PEP program, you can focus your efforts on finding out what type of organization you would like to work for first, and then find the experience route attached to your position and employer.

Think about your interests and career goals: which accounting courses have you found most interesting? What jobs and employers will allow you to work in those areas? What context do you want to work in: public, private or government?

Answer these questions, find employment that suits you, and then work within one of the routes. Both experience routes ensure that candidates can complete the professional program in any work situation.

Eric Pye
Career Service Advisor
Alberta Accountants Unification Agency

It's like getting free money... wait, it is free money!

The CA Education Foundation of Alberta (CAEF) wants to help you succeed in reaching your career goals. The following awards are currently available to post-secondary students:



Douglas R. Hagerman FCA Entrance Scholarship

One award granted annually to one (1) student from any Alberta post-secondary institution and entering his or her first year in a business/commerce program approved for entry into the CA School of Business. The award amount is \$2,500 and is payable over three years as follows: \$500 first year, \$750 second year and \$1,250 third year. Renewal for the second and third year is based on satisfactory academic achievement in the prior year with a minimum course load of 24 credits. Successful applicants must provide official academic transcripts to the CAEF each year before funds will be disbursed. Selection is based on involvement in volunteer activities and expressed interest in pursuing a professional accounting designation.

Applicants must:

- submit one application letter on why he/she should be considered for the award and demonstrate expressed interest in pursuing a professional accounting designation;
- provide proof of first-year enrollment at Alberta post-secondary institution in business/commerce program approved for entry into the CA School of Business; and
- submit at least one nomination letter to support that the applicant has demonstrated involvement in volunteer activities.

Application Deadline: November 30, 2014



Kenneth Biggs FCA and Leona Biggs Scholarship

\$2,000 awarded annually to one (1) Alberta post-secondary student who is registered in the final year of a business/commerce degree program with a declared major in accounting. Applicants must have secured a training position with a pre-approved training office offering a career path outside of external audit (formerly known as expanded experience opportunity employer). Selection is based on demonstrated satisfactory academic standing and leadership in the community or on campus.

Applicants must:

- submit one application letter on why he/she should be considered for the award;
- submit at least one nomination letter to support that the applicant has demonstrated leadership in the community or on campus;
- submit most recent transcripts to demonstrate satisfactory academic standing; and
- provide proof of secured training position with a training office offering a career path outside of external audit.

Application Deadline: April 30, 2015



James C. Miller FCA Bursary in Accounting

Two (2) \$1,250 awards awarded annually to two students enrolled in any recognized university or university transfer program intending to enter the CPA Professional Education Program and residency (or former residency) in Medicine Hat preferred. Selection based on academic excellence and community involvement.

Applicants must visit the CAEF website at www.CAEFAlberta.ca to download the application form.

Application Deadline: April 30, 2015



Richard Schulli CA Memorial Scholarship

\$2,500 awarded annually to one (1) student entering his or her third or fourth year of study pursuing an undergraduate business/commerce degree with a declared major in accounting. Selection is based on involvement in volunteer activities (preferably in a mentorship role), satisfactory academic achievement in the prior year of study and an expressed interest in pursuing an accounting designation.

Applicants must:

- submit one application letter on why he/she should be considered for the award;
- submit at least one nomination letter to demonstrate the applicants involvement in volunteer activities;
- submit transcripts to demonstrate satisfactory academic standing; and
- provide proof of registration for upcoming academic year before funds will be disbursed.

Application Deadline: April 30, 2015



Don Wilson CA Memorial Scholarship

Up to \$2,000 awarded annually to a fourth-year university student in Alberta or Saskatchewan who is registered in a CA School of Business accredited degree program. Applicant must have satisfactory academic standing and demonstrated leadership within the community or on campus. Applicant must have secured a training position with a pre-approved training office offering a career path outside of external audit (formerly known as expanded experience opportunity employer).

Applicants must:

- submit one application letter on why he/she should be considered for the award;
- submit at least one nomination letter to support that the applicant has demonstrated leadership in the community or on campus;
- submit most recent transcripts to demonstrate satisfactory academic standing; and
- provide proof of secured training position with a training office offering a career path outside of external audit.

Application Deadline: April 30, 2015

How to Apply

Send all required documents (as noted in each award description) to the CAEF in one of the following ways:

By email: CAEF@icaa.ab.ca

By mail: Chartered Accountants Education Foundation of Alberta (CAEF)
#580, Manulife Place
10180-101 Street
Edmonton, AB T5J 4R2

Award selections made by the Chartered Accountants Education Foundation of Alberta.

www.CAEFAlberta.ca

2014 CAEF Legacy Scholarship Recipients

Thanks to the generous donations from our Alberta CAs, the Foundation was able to award the 30th Anniversary Scholarships once again this year!

The Foundation offered these scholarships in the form of awards called Legacy Scholarships.

Legacy Scholarship Awards:

- Aboriginal Student Business Award
- Academic Excellence Awards
- CA School of Business Student Award
- Generations of Excellence Awards
- Young Emerging Professional Awards
- New Canadian Achievement Awards

Meet two recipients who were awarded the following 2014 scholarships:

Generations of Excellence Award

This award supports family of ICAA members in pursuing a career path in accounting.

"This award has allowed me to more comfortably pursue my professional and personal goals without too much stress surrounding my budgetary concerns. I cannot adequately express the great impact that this has had on my life."—Erin St Pierre

New Canadian Achievement Award

This award was created to support new Canadian or permanent residents who are working towards a commerce degree or an accounting designation.

"I want to thank the CAEF for believing in an education and offering students a reward for their hard work. As a student, there is nothing more rewarding than seeing that others see value in what you do and that in the end, when you work hard, you do get rewarded."—Andra Bob

To learn how you can apply for the 2015 Legacy Scholarships, visit: www.CAEFAlberta.ca



How to prep for an interview...

By Nancy Green

Career Services Advisor, Alberta Accountants Unification Agency

You've just received that call for an interview. Congratulations! Now you want to walk into that interview with confidence to show the potential employer that you are the right person for the position.

How do you prepare yourself to do that?
It's as simple as PPP: Prepare, Practice and Perform!



Prepare

Take a look at the job posting to see what skills and experience the company is looking for. Think of examples of how you have developed those skills—choose examples from school, volunteering, or extra-curricular activities. Research the company. Look up your interviewer on LinkedIn. Craft your elevator speech. Prepare leading questions to ask the interviewer to help you evaluate whether the company or position is a good fit for you.

Practice

Interviewing is a learned skill so the more you practice, the better you will perform. Have a friend or family member ask you typical questions or practice in front of a mirror—it is important to verbalize your answers. The most common type of question asked by a recruiter is the Behavioural Descriptive Interview (BDI) question. These questions touch on how you handled situations in the past, which is a good predictor of how you will handle similar situations in the future.

BDI questions go beyond whether you can do the job. They focus on assessing whether you will do the job well. BDI's commonly start with: Tell me about a time when... Give an example of ... Describe a specific problem when...

The most effective way to answer a BDI question is with the "STAR" method:

- **Situation:** Describe the situation - What was the occasion? Who was involved?
- **Task:** Talk about the task you had to perform. What needed to be fixed or improved? What was the problem or opportunity?
- **Action:** Explain what specific action(s) you took, not what the group or other individuals did. How did you solve the problem? What techniques or skills did you use?
- **Result:** Finish with what the end result was. What affect did your solution have on the situation? How was the organization impacted?

It is important to use specific examples from your past experience, as this will help distinguish you from the other candidates. Remember, usually all applicants have an accounting degree, and most have also worked on group projects with members who didn't pull their weight. Therefore, try to choose examples that are unique to you.

Perform

Once you are prepared and have practiced your answers, now it is time to perform. Dress professionally and arrive for the interview at least 10 minutes early. Smile and be courteous to everyone you meet, as you never know who is part of the final decision-making process of who to hire. At the end of the interview, make sure to thank the interviewers and restate that you are interested in the position, if that is the case. Afterwards, follow up with a thank-you note.

If you are prepared, practiced and stay positive, you will be able to present yourself confidently and professionally in your interview. 📧

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your advice
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A unified accounting profession

