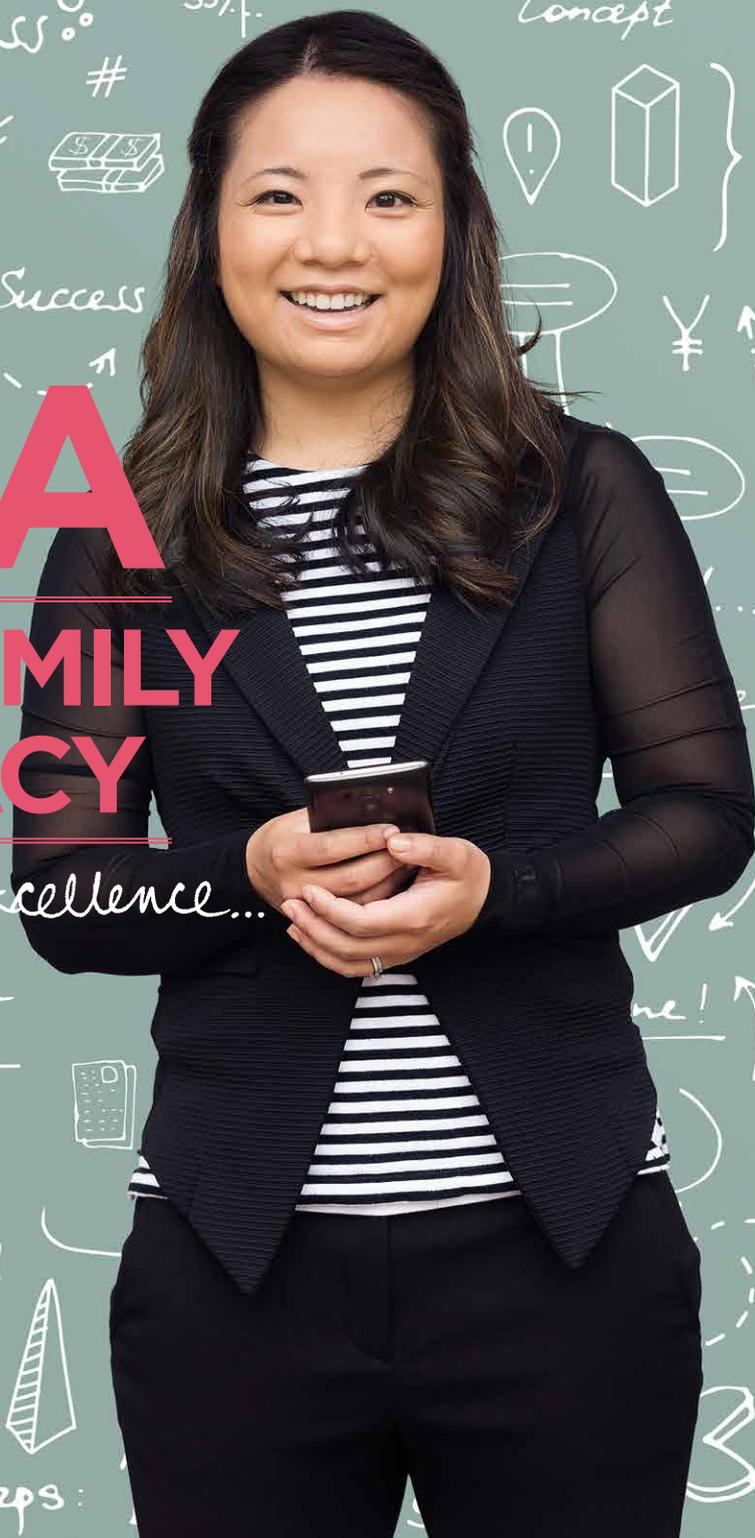
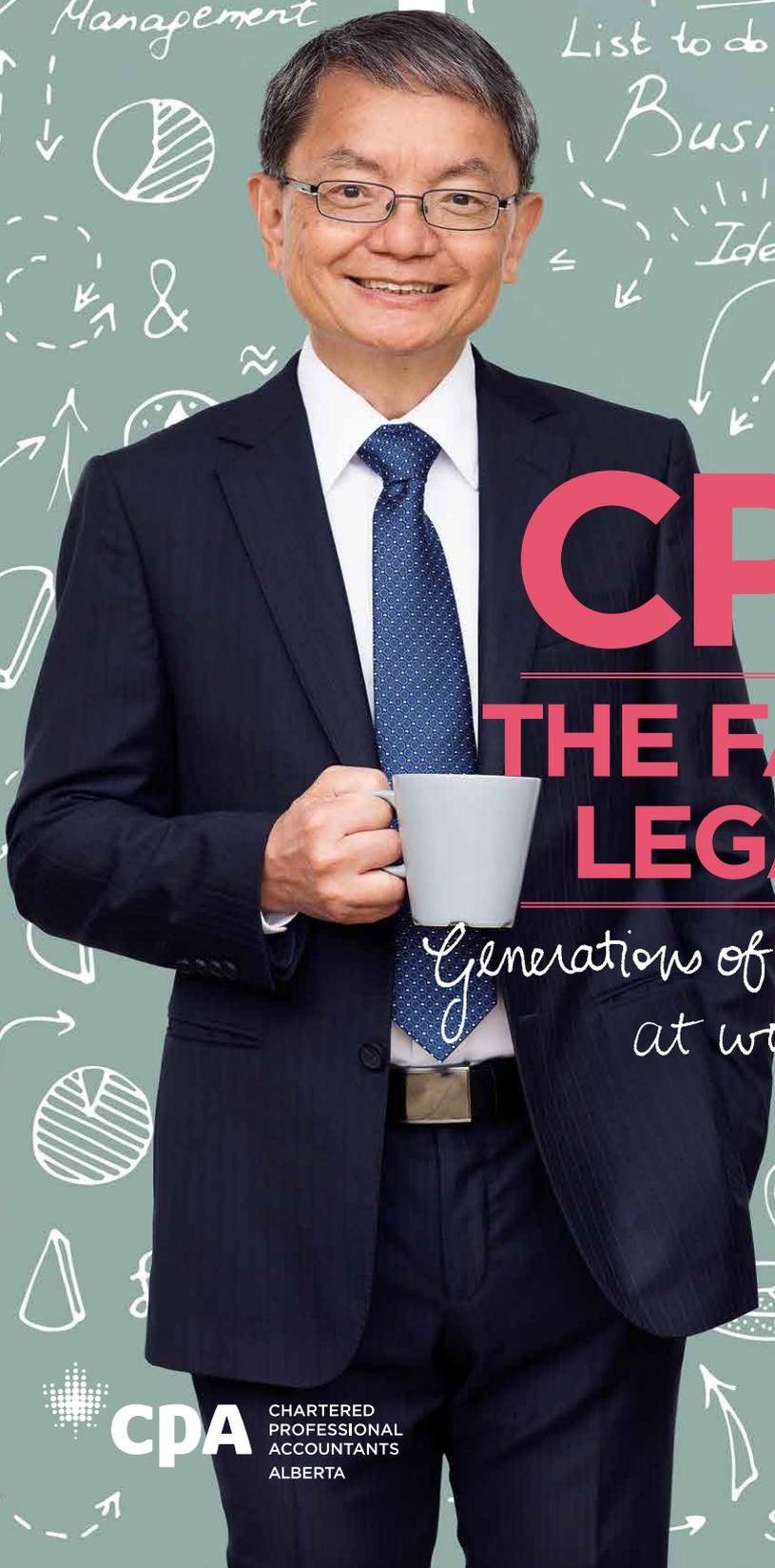


FALL 2016

# capitalize

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## Message from the CEO of CPA Alberta



Rachel Miller FCPA, FCA  
Chief Executive Officer,  
CPA Alberta

I love the start of a new school year and the countless possibilities it brings. A new school year is a fresh start for new successes and challenges—as well as unexpected opportunities to learn and develop—and it is the perfect time to start thinking about your future and what it holds for you.

Getting started early is a great way to build a challenging and fulfilling future career. And for those who are even *more* forward-looking, who want a career that will also have an impact on the future itself, a career in accounting and a CPA designation could be just the ticket.

In this issue of *Capitalize*, we feature the stories of professional accountants who discovered that the skills and knowledge that come with a career in accounting were instrumental to not only shaping their own futures, but the futures of people around the world. Every day, these CPAs contribute to innovative industries that develop revolutionary products and technologies that change the way things are done everywhere; they have unique and rewarding careers that they are very proud of.

So—as you'll read in this issue—whether you get your career start by following in the professional footsteps of a family member or discovering your passion for an industry through volunteering, a CPA designation can jumpstart you towards a truly remarkable future.

On page 7, you'll find a helpful start-to-finish guide on how to prepare for CPA recruitment. The guide has tips for students at any stage of their education and can be a great resource to ensure that you make the most of your post-secondary experiences.

I hope you'll take advantage of the opportunities this upcoming school year has to offer. It's never too early to start thinking about your part in changing the future—both yours and that of the world we live in.

I wish you all the best for a productive and successful school year.

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*Capitalize* is a semi-annual magazine that introduces students to the accounting profession in Alberta. Published by CPA Alberta, 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 service providers.

### To learn more about becoming a CPA:

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### Our Calgary offices are moving!

Beginning October 17, CPA Alberta's two Calgary offices will be merged into one new location. As of October 17, you can find us in Calgary at:

Suite 800, 444 - 7 Avenue SW  
Calgary, AB T2P 0X8

Please check our website for more information on how to contact us at the new location after October 17.

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# CALENDAR

events

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

## September

- 9 **Meet Your Employer**  
Shaw Conference Centre, Edmonton
- 13 **Accounting and Finance Career Fair**  
Mount Royal University, Calgary
- 14 **Meet Your Employer**  
Students' Union Ballroom, Lethbridge
- 15 **University of Calgary Career Fair**
- 16 **Meet Your Employer**  
Telus Convention Centre, Calgary
- 21 **University of Lethbridge Career Fair**
- 21 **University of Alberta Accounting Club Dinner**
- 22 **CPA Recruitment Info Session: How to Get a Job with an EVR or PPR Employer**  
Online
- 28 **University of Alberta Careers Day 2016**
- 30 **Mount Royal University BASS Golf Tournament**  
River Spirit Golf Club, Calgary

## October

- 8-9 **AIESEC - Western Regional Conference**  
Radisson Hotel and Conference Center, Calgary Airport
- 11 **CPA General Info Session**  
University of Lethbridge, Andy's Place (AH100)  
4:30 - 6:00 pm
- 12 **CPA General Info Session**  
University of Alberta, Business Building, Room 5-40  
5:00 - 7:00 pm
- 12 **CPA General Info Session**  
MacEwan University, Room 7-277  
4:00 - 5:00 pm
- 13 **CPA General Info Session: "Back to Briefcases" event**  
Red Deer College, Donald School of Business, Room DSB 310  
1:15 - 2:15 pm
- 14-15 **NAIT Career Fair**
- 17 **CPA General Info Session**  
University of Calgary, SH 310 Royal Bank room  
11:00 am - 12:30 pm
- 18 **CPA General Info Session**  
SAIT, Orpheus Theatre  
2:00 - 3:00 pm
- 18 **CPA General Info Session**  
Mount Royal University, Bissett Boardroom (EB2061)  
3:30 - 4:30 pm

## November

- 5 **MacEwan University Career Fair**
- 8 **NAIT Career Fair**
- 17 **Bow Valley College Career Fair**
- 19 **Diving into Business** (hosted by the CPA Education Foundation)  
Telus Convention Centre, Calgary
- 22 **CPA General Info Session**  
NAIT, HP Building, WA112  
11:15 am - 1:15 pm

## December

- 2 **Dress and Dine for Success**  
University of Calgary

For more information about these events, please email [gettingstarted@cpaalberta.ca](mailto:gettingstarted@cpaalberta.ca) or check us out on social media:

# Meet your CPA Campus Ambassadors

CPA Alberta's Campus Ambassador team is here to assist you on the path towards your Chartered Professional Accountant (CPA) designation. The following ambassadors will be a primary point of contact for you to get information about the CPA Professional Education Program, as well as important events and activities.



## Zirgham Abeer

University of Lethbridge  
(Calgary Campus)  
[zabeer@cpaalberta.ca](mailto:zabeer@cpaalberta.ca)

### Why were you interested in becoming a Campus Ambassador?

I was interested in becoming a Campus Ambassador as it will provide me with the opportunity to network with students and inform them about the possibilities the CPA designation can give them. Showing students how essential the CPA designation is for accounting professionals in Canada and the wealth of opportunities that will be available to them as a result of having this designation will get them excited about their future.

### If you could time travel into the future, what do you imagine it will be like?

Frequent and accessible flights into space, along with a wide range of electric, self-driving cars.



## Mark Basi

MacEwan University  
[mbasi@cpaalberta.ca](mailto:mbasi@cpaalberta.ca)

### Why have you chosen to pursue a career in accounting?

Following my BSc, accounting seemed like the right choice for me. This career has many networking opportunities, provides stability, allows me to advise people on important decisions, and takes place in an environment where I feel I would thrive. An accounting designation opens up many career opportunities.

### If you could time travel into the future, what do you imagine it will be like?

I imagine the future to be a more evolved and integrated society that is increasingly dependent on technology. However, I hope to see less dependence on fossil fuels and more support for solar and wind energy. A more balanced society in every sense would be ideal.



## Kelsey Bell

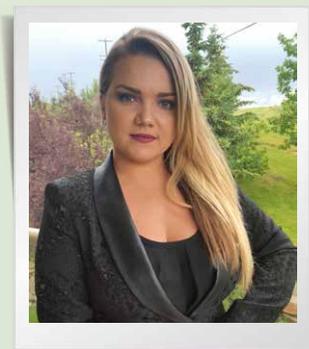
Concordia University  
[kbell@cpaalberta.ca](mailto:kbell@cpaalberta.ca)

### Why have you chosen to pursue a career in accounting?

I was always interested in business as my father is a Chartered Professional Accountant, and I heard about all the interesting things he has experienced during his career. Building a career on a CPA designation opens many doors that will lead me down a similar path where I can continue his legacy as an accountant.

### What is something about you that people might be surprised to know?

I have been a competitive Irish dancer for 15 years and in July 2016, I competed at the North American Irish Dancing Championships in Orlando, Florida.



## Yekaterina Giyasova

SAIT  
[ygiyasova@cpaalberta.ca](mailto:ygiyasova@cpaalberta.ca)

### Why were you interested in becoming a Campus Ambassador?

I wanted to know as much as possible about the CPA program. I will be pursuing my designation as soon as I graduate so I wanted to be prepared and know everything about the modules.

### What is something about you that people might be surprised to know?

I was born in Uzbekistan, and when I was six years old, I moved to Thailand, where I lived until I was 21. My first language is Russian, second is Thai, and the third is English.

# HELLO I AM...

MEET YOUR CPA CAMPUS AMBASSADORS / FALL 2016 • CAPITALIZE / 5

## SOMEONE WHO CAN HELP!



### Alex Glydon

University of Lethbridge  
[aglydon@cpaalberta.ca](mailto:aglydon@cpaalberta.ca)

#### Why have you chosen to pursue a career in accounting?

I have chosen to pursue a career as an accountant because of the complexity of the job and the many potential career paths that becoming an accountant will offer me.

#### What is something about you that people might be surprised to know?

I enjoy golf and, despite my very average game, I have won a prize in every tournament I have been in so far.



### Taylor Lafave

Mount Royal University  
[tlafave@cpaalberta.ca](mailto:tlafave@cpaalberta.ca)

#### Why were you interested in becoming a Campus Ambassador?

I was interested in becoming a Campus Ambassador because I wanted to be involved with the Bissett Accounting Student Society (BASS) at Mount Royal University and communicate my passion for pursuing the CPA designation.

#### Where do you aspire to be in 10 years with your career? What would your dream job be?

I aspire to be a successful CPA graduate. I want to have a job that challenges me, but also keeps me engaged and makes me excited to come to work every day. I could see myself being a partner at one of the Big Four firms, or an executive at another company.



### Molly Moore

University of Alberta  
[mmoore@cpaalberta.ca](mailto:mmoore@cpaalberta.ca)

#### Why have you chosen to pursue a career in accounting?

Accounting seemed like the perfect option that combines my interest in mathematics with my passion for teamwork. I like to decipher puzzles and solve problems.

#### Where do you aspire to be in 10 years with your career? What would your dream job be?

My dream job is to combine leadership with accounting and to be a controller with a company. I would love to work in tourism because I believe it is a growing sector and it creates positive experiences for others.



### Harley Russell

NAIT  
[hrussell@cpaalberta.ca](mailto:hrussell@cpaalberta.ca)

#### Why were you interested in becoming a Campus Ambassador?

The opportunity to get more involved with my school and to gain more knowledge of the accounting industry appealed to me. I am excited about participating in events and networking with influential CPAs and Campus Ambassadors across the province.

#### What is something about you that people might be surprised to know?

I have dislocated both shoulders over 18 times and have had surgery on each shoulder. It took years of recuperation, physio sessions, and slings in between surgeries to recover. My scars are my motivation—a reminder that I can overcome anything!



### Haida Syed

University of Calgary  
[hsyed@cpaalberta.ca](mailto:hsyed@cpaalberta.ca)

#### Why have you chosen to pursue a career in accounting?

I was attracted to accounting because I find it intellectually and analytically stimulating. Also, accounting provides many opportunities and unlimited potential both locally and internationally, as the skills and business acumen offered by an accountant are valuable everywhere.

#### If you could time travel into the future, what do you imagine it will be like?

I foresee an exciting future where we will be using more cloud-based databases and forming virtual companies that will offer accounting services globally. By leveraging technology we will be able to free up more time from mechanical tasks to provide more timely and personalized services to clients.

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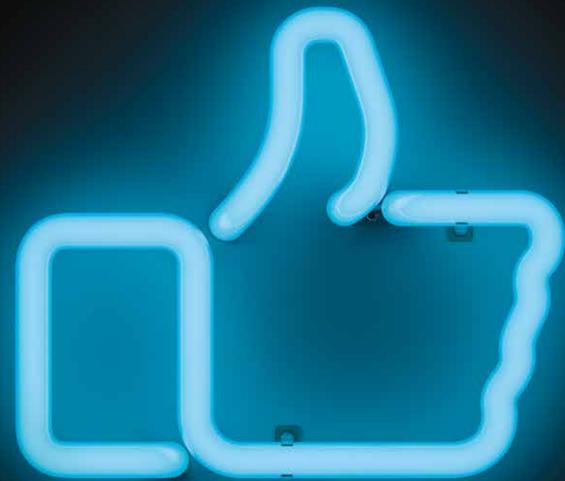


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# One, two, three, four: how to prepare for CPA recruitment

So you've decided to become a Chartered Professional Accountant (CPA). Now what? You have to study hard and graduate, and then, like every other grad, you need to find a job!

**WHILE THE BULK** of your search for employment in accounting typically starts in the fourth year of your post-secondary studies, there are plenty of things you can do to prepare yourself prior to your fourth year. Rather than waiting, taking a proactive approach to recruitment throughout your post-secondary education will bring you more success with securing employment.

**Here's what you can do at each step of your student career to get ready for employment as a CPA candidate:**

## Year 1: Gather information

Research, network, repeat. This is the perfect time to find out exactly what the designation has to offer, and where you think you'll find your fit: read about the profession; look at the differences between the Experience Verification Route (EVR) and Pre-Approved Program Route (PPR) training paths; and talk to other CPAs.

Also attend as many networking events as you can. For example: Meet Your Employer, Diving into Business, Bowl-A-Rama, and Get Connected. These events provide great ways to learn more about the profession, and also provide networking opportunities with different members and employers from various backgrounds.

## Year 2: Network

It's never too early to get out there and meet with people in the CPA profession. This not only might help you secure a job down the road, it can also help you feel confident that you are making the right decision for your future. Make sure to check out the events held by student clubs on your campus, as well as CPA Alberta events.

## Year 3: Build your resume

Keep in mind what potential employers look for in a candidate. Volunteer, find part-time employment, or join a sports team to gain extra skills and experience. Employers look for well-rounded candidates whose skills go beyond the classroom, and who demonstrate that they will be able to handle the pressures of balancing employment and the CPA Professional Education Program (CPA PEP).

The majority of employers who offer the PPR will do most of their hiring for upcoming summer positions in the fall (although they hire all year round). If you are planning to train with an employer who can offer the EVR, you can search for employment all year round. You are encouraged to attend the Meet Your Employer events in the fall to discuss your options and meet with both PPR and EVR employers.

If you are simply looking for a co-op or summer position, you should start searching for opportunities in September.

The time to network is never over! Make sure to check out the events held by student clubs on your campus, as well as CPA Alberta events. Take advantage of the opportunities with the student clubs to improve your personal brand and interpersonal skills.

## Year 4: Start your job search now!

Get your resume reviewed by a friend, a mentor, or the career services department on your campus (who may offer mock interviews as well).

September and October are important months when it comes to securing employment with an employer under the PPR. You should attend the Meet Your Employer events in September to network with different organizations looking for students like you.

All employers can recruit students throughout the year, whether they are an employer under the PPR or EVR training paths. Keep your eyes peeled for job postings with various organizations across all industries that are willing to invest their time in training CPA candidates. 

# CONNECTING ACCOUNTING TO YOUR PASSIONS

By Sanita Dhillon Photo by Laughing Dog Photography

By following the Experience Verification Route for her practical experience, future CPA Faith Bacolod has been able to choose an employer that allows her to connect her career path to her passions

## CHILDHOOD PASSIONS

Future CPA **Faith Bacolod** was born and raised in Manila, Philippines, and moved to Edmonton with her family when she was 14. After completing high school, Faith pursued her passion for caring for other people by getting a summer job at Hope Mission, a not-for-profit Christian social care agency that supports impoverished and homeless people in Alberta.

While working as a “big sister” for youth and helping prepare meals at Hope Mission, Faith decided that she should have a solid career plan that would allow her to pursue all of her passions later on in life. “I was told that as a CPA, the opportunities are endless,” she says. Taking that advice to heart, Faith enrolled in the University of Alberta Bachelor of Commerce program to major in Accounting. “I never thought those opportunities would appear so early in my career.”

During her final year of university, a position in the finance department at Hope Mission came up and Faith jumped on the opportunity. Upon her graduation in 2013, she was offered a full-time position and now continues to work at Hope Mission to help care for those in need.

Faith Bacolod outside of Hope Mission in Edmonton.



# HOPE MISSION

“I take great satisfaction in knowing my accounting knowledge and critical thinking skills are being used in programs that make a difference in people’s lives.”

## ALL IN A DAY’S WORK

Faith is now an Assistant Controller at Hope Mission. With a key focus on revenue and grants, her job requires her to regularly report program performance and compare it with the contracted budget. “It is my role to identify variances within these reports and compare them with historical performance,” she explains. “I then identify reasons for change and help pinpoint strategies that are presented to management.”

Although Faith does not work directly with the clients, she loves working for an organization that cares for those in need while allowing her to pursue her chosen career path. “I take great satisfaction in knowing my accounting knowledge and critical thinking skills are being used in programs that make a difference in people’s lives.”

While at Hope Mission, Faith also works toward earning her CPA designation, completing the practical experience requirement of the CPA Professional Education Program (CPA PEP) using the Experience Verification Route (EVR). “I am thankful that the Experience Verification Route exists,” says Faith.

## WHAT IS THE EXPERIENCE VERIFICATION ROUTE (EVR)?

CPA candidates in CPA PEP can choose between the Pre-Approved Program Route (PPR) or the Experience Verification Route (EVR) to complete their Practical Experience Requirements (PER). The PPR is offered by employers who have had their accounting positions approved by CPA Alberta in advance; this route requires less documentation from candidates to prove they are developing the competencies for the designation. The EVR

requires more documentation, but “allows you to work in an accounting role with an employer not previously approved by CPA Alberta,” says Faith. “It’s a great way to connect accounting with your passions and help you access mentors with similar interests.”

“The process for documentation is very direct and easy,” she explains. Faith records details of her day-to-day responsibilities using the Practical Experience Reporting Tool (PERT) and submits reports for approval by her supervisor, followed by CPA Alberta, at key milestones. This process helps ensure she is challenged with responsibilities that allow her to fulfill CPA requirements and meet what is expected of a new CPA.

## WORDS OF WISDOM FOR FUTURE CPAS

Faith advises future CPAs who are embarking on their practical experience to learn as much as they can about their future role: “Talk to potential employers and express your interest in completing the CPA program; ask them whether the role will provide the appropriate experience to obtain the CPA designation.”

Faith also highly recommends taking advantage of mentorship opportunities. “I am so grateful that I am surrounded by supportive people who want to see me succeed, including Myrna Cuevas CPA, CGA, Gregory Bounds CPA, CMA, and Bruce Reith, Hope Mission’s Executive Director.”

In the future, Faith sees herself in a more senior role within the not-for-profit sector.

“I am truly doing what I love. I know that having a CPA designation will only propel me forward and allow more opportunities to help communities.” 

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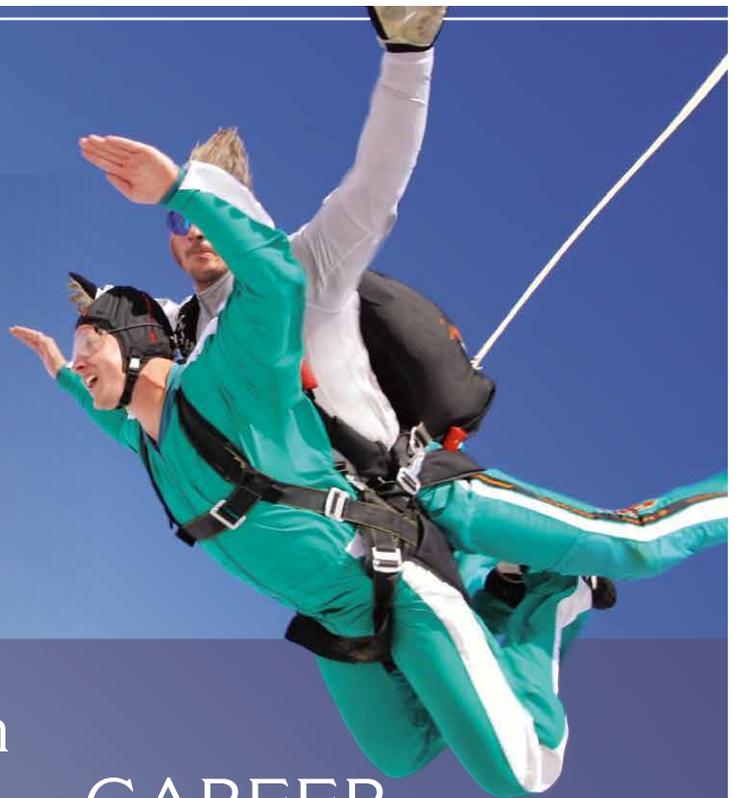
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# Should you stay or should you go?

Travel writer Debra Smith outlines the professional and personal benefits of travelling, and provides tips for students on how to get the most out of their passports

By Debra Smith

ONE MISTY AUGUST MORNING, I hoisted my backpack off the driveway and headed for the airport on my first trip to Europe. I had a guidebook and I knew I was landing in London, but there was no internet or cell phones and I had no plan. Luckily for me, and the thousands of other students who hit the road that year, things worked out just fine. More importantly, that trip to England and around the Mediterranean ended up shaping the course of my working life. Travel became my passion and eventually I became a full-time travel writer.

If you're considering—or have already decided on—a career as a CPA, you might be wondering if taking time off to travel is a wise decision. Do you have an itch to see South America over the winter break, visit Paris in the spring, or be in New York on the Fourth of July? Maybe you'd like to learn another language or volunteer to build a school. The good news is that all of these travel options will benefit you and your future employers, clients, and colleagues.

As a CPA, you will be called upon to perform essential services in a world that is increasingly interconnected through business and economics. Travel will give you a distinct advantage on the new, global playing field. Finding your way through the hustle and bustle of international cities like Tokyo, Singapore, and Rome will increase your

self-confidence. You will discover that there are many ways to communicate, and that you can buy a beer in multiple currencies, deal with missed trains and lost luggage, and still end up smiling.

In addition, you will learn new customs, broaden your perspectives, and make new friends. You'll learn how to reserve judgement and become observant—a skill that will be invaluable in future negotiations. You will learn how to be calm under pressure and secure in your abilities—in short, exactly the kind of mature, well-rounded person that employers are looking for. And you'll have lots of great stories to share with your friends back home.

For student travelers, G Adventures is a well-established tour organizer who specializes in small group travel to destinations all over the world. If you're travelling solo, websites like TripAdvisor.com and Lonely Planet's Thorn Tree forum are full of information on every destination under the sun. For low-cost accommodations and a chance to interact with locals, try Couchsurfing.com. Take advantage of your student status and apply for the International Student Identity Card (ISIC), which students up to 31 years of age are eligible for.

Just watch out for the travel bug. Once you've been bitten, you might never stop. 



# BUSINESS WITHOUT BORDERS

Priya D'Souza's CPA designation has taken her all over the world, and now she translates her experiences into helping others

By Labonneau Dey Photo by Trudie Lee Photography



**WHEN** Priya D'Souza CPA, CA tells students and professionals that "the CPA designation provides significant opportunities to explore many promising career paths," she knows what she's talking about.

With the skills, credibility, and versatility attached to this lucrative designation, Priya, a Regulatory Analyst with the Alberta Securities Commission (ASC), began her career in public practice in India and worked in Qatar before immigrating to Canada. Although her CPA training provided her with a strong foundation, transition to a new country always requires some adjustment: "In the past few years, I have focused on embracing Canada as my new home. I have invested effort to obtain the Canadian designation and to educate myself on Canadian culture," she admits.

While culture shock and homesickness can overwhelm the best of us, Priya chooses to channel her experiences into productive and positive endeavours. Previously a Board Director for two years, Priya is a strategic committee member for the Calgary Immigrant Women's Association (CIWA), a non-profit settlement agency that addresses the unique concerns and needs of immigrant refugee women, girls, and their families.

Since its inception in 1982, the CIWA has helped more than 80,000 immigrant women transition into Canada more comfortably and successfully—a mission that personally

resonates with Priya. "I felt I could impart the education I received from my personal experiences to give back to the community," she says.

Indeed, as a member of CPA Alberta who has worked on various international platforms with individuals of diverse cultural backgrounds and skill sets, Priya's global experiences have shaped her career and provided her with multiple outlets for pursuing her passion for helping others. Priya has also volunteered with CPA Alberta's Foreign-Trained Professional Mentorship Program and the CPA Alberta Early Career Working Group. "I am doing my small part towards supporting the development of the community," she claims modestly.

With CPA designations in both India and Canada currently under her belt, Priya adds, "as a professional, I have learned that seeking and providing mentorship and career guidance is imperative for continuous career growth. So, I am invested in fostering the growth of young professionals and transitioning new immigrants and foreign-trained accountants into Canadian society."

For students itching to travel the world and access the international market, Priya speaks from firsthand experience when she suggests that the CPA designation can be a ticket for aspiring jet setters. "In our global era, accounting designations around the world support international careers. The CPA designation may be new, but it's a huge step

"CPAs are 'business partners' who provide a financial perspective on innovation, and who see beyond the numbers to increase efficiencies, identify opportunities to add value, and participate in evaluating strategies."





towards providing maximum global mobility and providing long-term value to professional accountants.

“The role of a professional accountant has grown bigger over the past few decades; CPAs are ‘business partners’ who provide a financial perspective on innovation, and who see beyond the numbers to increase efficiencies, identify opportunities to add value, and participate in evaluating strategies,” adds Priya. “To continue competing on a global stage, international experience helps with the continued pursuit of academic studies and the personal connections one makes on a global scale.”

Successful business leaders, like Priya, approach the CPA career path with a desire to continue learning and growing both personally and professionally; this desire is especially true for individuals working on an international platform. “Similar to other countries,” she reports, “Canada has its own culture, business etiquette, and business laws. Learning these elements has contributed towards professional

maturity and confidence, which has helped me develop skills essential to career growth.”

Mastering these customs, in addition to playing an active role in community building, has buoyed her career by providing her with opportunities to enhance leadership skills in areas such as strategy and governance. Her hard work recently earned her a 2016 Early Achievement Award from CPA Alberta.

“It is my honour to be able to give back to the community that I live in and draw from. I was humbled to receive the award. The award is an encouragement to CPAs in the earlier years of their career as they explore career paths and give back to the community. I look forward to the milestones that lie ahead in my career,” Priya reflects.

With her experience as a CPA—coupled with her dedication to continue growing as a business professional while giving back to her community—it’s only a matter of time before those milestones are realized. 



# CPAs shaping the future

Every single day, Alberta CPAs contribute to companies that develop groundbreaking processes and products that change the way things are done in industries all over the world

By Laura Ly **Photography by** Trudie Lee Photography



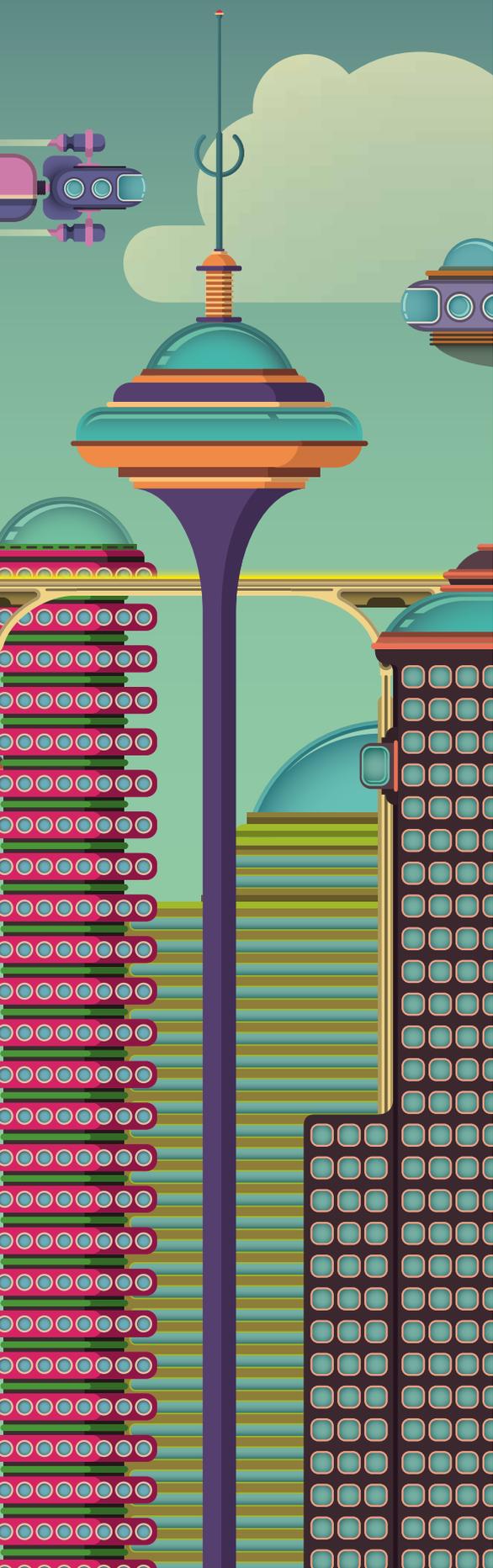
**1950s-era** science fiction imagined the 21st century with flying cars, faster-than-light space travel, robots, and other similar innovative technology. While the actual 21st century hasn't resulted in colonies in space or commuting to work via vehicles in the air, innovators have nevertheless developed amazing technology that has changed the way we live. This includes sustainable energy development, innovative ways of driving corporate social responsibility, beneficial technology that has revolutionized the aerospace industry, and so much more than the science fiction writers of the 1950s could have ever imagined.

And the common thread that runs through all these technologies and companies? CPAs.

In Alberta, CPAs play a key role in companies that change the future by making industries more efficient, sustainable, and safer in our province, country, and around the world. For FLYHT Aerospace Solutions Ltd. (FLYHT), that means making things safer for passengers as they literally go around the world.

"The aerospace industry is using black box technology that was designed in the 1960s," explains **Nola Heale** CPA, CA, VP Finance and Chief Financial Officer at FLYHT. The "black box" is a data recorder that keeps track of information during a flight, and in tragic circumstances such as plane crashes, finding the black box may be the only way to identify what went wrong.

However, the outdated technology means most of the data can only be collected after the flight, and when planes fly over the ocean or into Arctic regions (where there are no land-based transmission towers installed), there is no way for aircraft to communicate information to the ground. In a world that is dominated by the transmission of real-time information 24/7, it seems counterintuitive that airplanes wouldn't possess the same technology.



Nola Heale CPA, CA

Until now, that is. For the first time in history, FLYHT's revolutionary Automated Flight Information Reporting System (AFIRS) acts as a "virtual black box" that enables flight data to be streamed from an aircraft in real-time. During regular operations, the data is used to alert maintenance and operations of any issues, and pilots can speak to the airline operations team by telephone and text message. In the event of an emergency situation, information such as a plane's location, altitude, airspeed, and pitch are transmitted to the ground within 15 seconds of the event.

"FLYHT's technology makes the industry a lot safer because you're keeping the aircraft in communication with the operations team, the ground, or emergency services at all times," says Nola, who oversees full financial oversight for FLYHT, including treasury and reporting. "Even though the airline industry is one of the safest industries in the world, it's still unacceptable that we ever lose an aircraft and the people onboard.

"FLYHT is unquestionably changing the aerospace industry," she adds.

Nola admits that while the aerospace industry is challenging, it is ideal for professional accountants like her who want to get "outside the numbers": "The depth of the CPA training gives accountants the ability to put diligence into their work—pull information together efficiently and accurately, but at the same time, to question those numbers at all

times. The training of accountants is sufficiently broad to be able to assist in a variety of areas in the business."

Nola also has a designation from her native country of South Africa. She doesn't downplay the impact her professional accounting designations have had on her career and in developing her skills. "By gathering training in the realm of business, I could make a contribution to the efficiency and growth of a company. I basically wanted to be the best I could be, in the contribution I could make, to whomever I assisted in my career," she notes.

**Sheri Wise CPA, CMA** agrees that the rewards of a CPA designation last a lifetime: "It gives you the flexibility to work in any industry. It really means you can follow your interests and find meaningful work anywhere."

In Sheri's case, following her interests brought her to BluEarth Renewables, an independent power producer that develops and operates wind, hydroelectric, and solar power projects—often working closely or in full partnership with Indigenous groups—in areas all over Canada and in parts of the United States. Sheri has been with BluEarth since it started in 2010, and is now VP, Controller. As part of the executive leadership team, Sheri manages the corporate services departments, including accounting, insurance, and payroll.

"Electricity markets are really evolving," explains Sheri. "The Alberta market has certainly presented more challenges in building

renewable energy projects in recent years, while some other markets have really encouraged renewables.

“BluEarth has proven that renewables can be cost competitive with conventional technologies, regardless of market structures,” she adds.

With 28 projects in operation or in various stages of development, BluEarth has established itself as a leader in renewable power with a long-term vision: “We build each one of our projects to generate cash flows for 20 years or more,” says Sheri.

In addition, BluEarth prides itself on ensuring that each project is as mutually beneficial as possible for everyone involved. “We operate all of our facilities with our own people. That’s not typical,” says Sheri. “It’s something we’re really proud of. Once a facility is operational, it’s our team on site; our team living in and being active members of those communities.”

In less than six years, BluEarth has grown to become a billion dollar company. Sheri admits that the fast growth of the company can be a challenge, but it’s one that her education and training have enabled her to meet head-on. “Our business does not always follow a cookie-cutter approach,” says Sheri.

“I’m always drawing on my experience and skills to figure out new accounting treatments and process improvements. It’s important to be creative in finding solutions.

“CPAs are really leaders in the business world. They hold up high standards for business practice and ethics, and that is key for any company to succeed,” she adds.

Sheri, a regular bike commuter, says that one of the most meaningful experiences of her career is being part of an organization that makes a tangible difference to the planet and whose values align with her own. “It’s been such an honour to be part of this team, and to help this organization succeed,” she says.

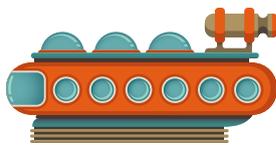
Equally important to technology in its capacity for shaping our future is the impact of giving back and making a difference in the community. Thanks to the work of **Melanie Laidlaw CPA, CGA** and Calgary-based Benevity, more than two million people working in companies around the world are able to contribute to more than 100,000 global charities annually—and those numbers grow each year.

Founded in 2007, Benevity has grown to become a global leader in workplace giving, volunteering, and grants management, and

counts big corporate names like Nike and Google among its client base. Clients use Benevity’s technology to power their goodness programs, which can include volunteering, matching employees’ individual charitable contributions, or developing corporate grants. The company’s Spark technology operates in 15 different languages and enables users to donate in almost any currency.

Melanie is a Product Manager with Benevity, and she is responsible for leading the creation of an automation strategy for the company’s back office processes. “We’re leveraging technology to make all of our financial processes more efficient. The finance group was doing a lot of things manually, and it was time to bring technology into it,” says Melanie, who acts as a liaison between the finance and software development teams.

The advantage of Benevity—for both its clients and the charities it works with—is the large number of donations that are processed through the software. “We basically aggregate donations from two million users around the world, 75% of which are disbursed electronically,” explains Melanie. Rather than process hundreds of individual donations, charities receive one lump-sum payment



“CPAs are really leaders in the business world. They hold up high standards for business practice and ethics, and that is key for any company to succeed.”

Sheri Wise CPA, CMA

Sheri Wise CPA, CMA



from Benevity each month. This frees charities from high administrative costs and the need for direct marketing for donations, which allows them to focus on their social missions. At the same time, companies are able to engage their employees around causes that matter to them, and make an impact both socially and in business.

“Companies have access to financial and human resources, and our tool really helps them get those resources to the places that matter,” adds Melanie.

A recently-launched project from Benevity is Benevity Labs, the company’s social incubator initiative. In partnership with other agencies, Benevity is looking at factors that influence social behavior. The aim is to test strategies to see if people can be convinced to give more, give in certain ways, and give on a reoccurring basis. The information would be provided to change leaders around the world to benefit the goodness sector.

“Companies have a responsibility to give

back,” suggests Melanie. “The value of that can’t be understated. And no matter where a student ends up in their career, it should always be something they have in their mind: ‘While I’m doing good for my company, how can I be doing good for the rest of the world as well?’”

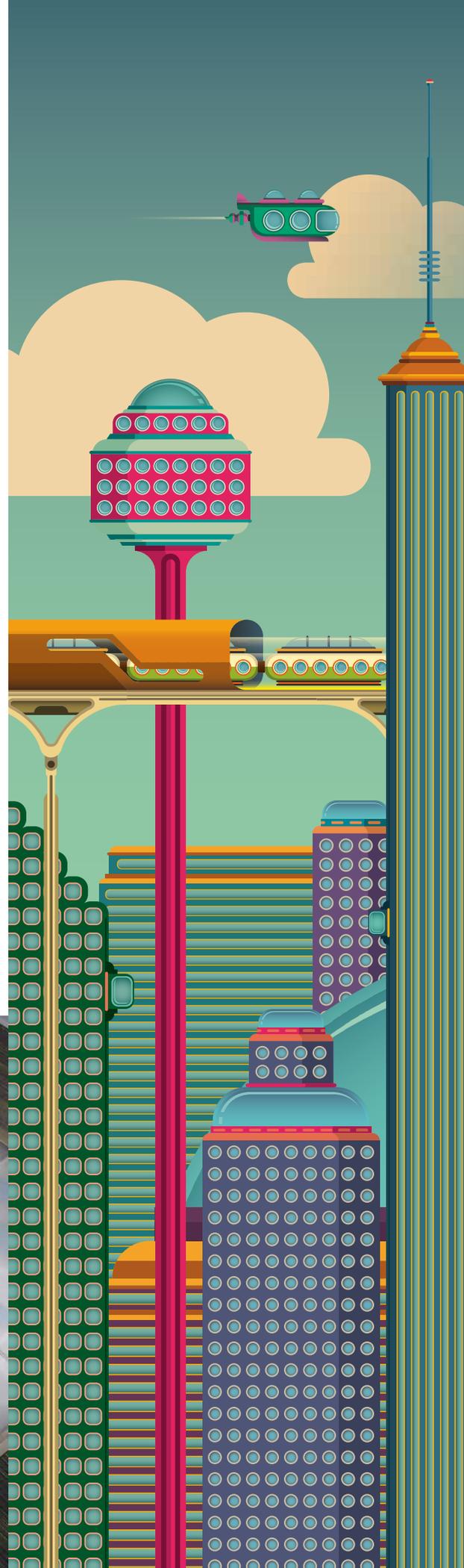
Melanie credits her designation for enabling her to fulfill her passion for “doing good in the world”: “The profession itself is always evolving, always in demand. Having a designation and the skills that come with it are only going to help people as they go through their career. It opens so many doors,” says Melanie.

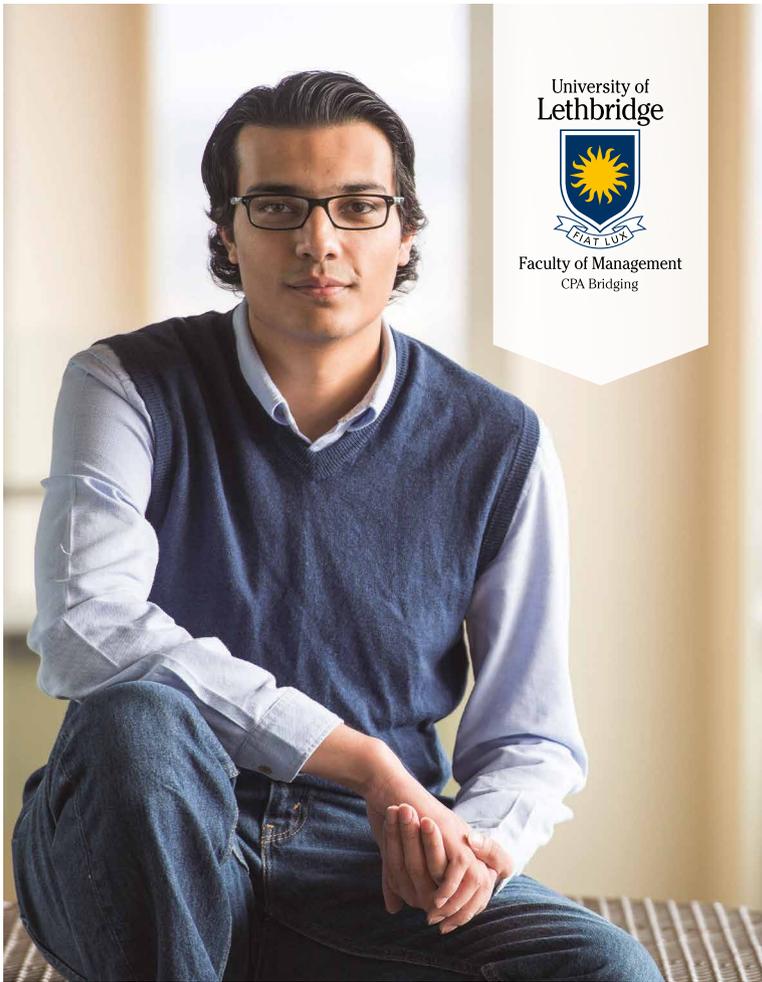
If the career paths of Nola, Sheri, and Melanie are any indication, a CPA designation can allow you to shape not just your own future, but the future of communities and people around the world. The breadth and depth of a career in accounting provides opportunities at the forefront of emerging technologies, and, perhaps, to groundbreaking solutions that even the most imaginative science fiction writer has yet to dream up. **C**

“While I’m doing good for my company, how can I be doing good for the rest of the world as well?”

Melanie Laidlaw CPA, CGA

Melanie Laidlaw CPA, CGA





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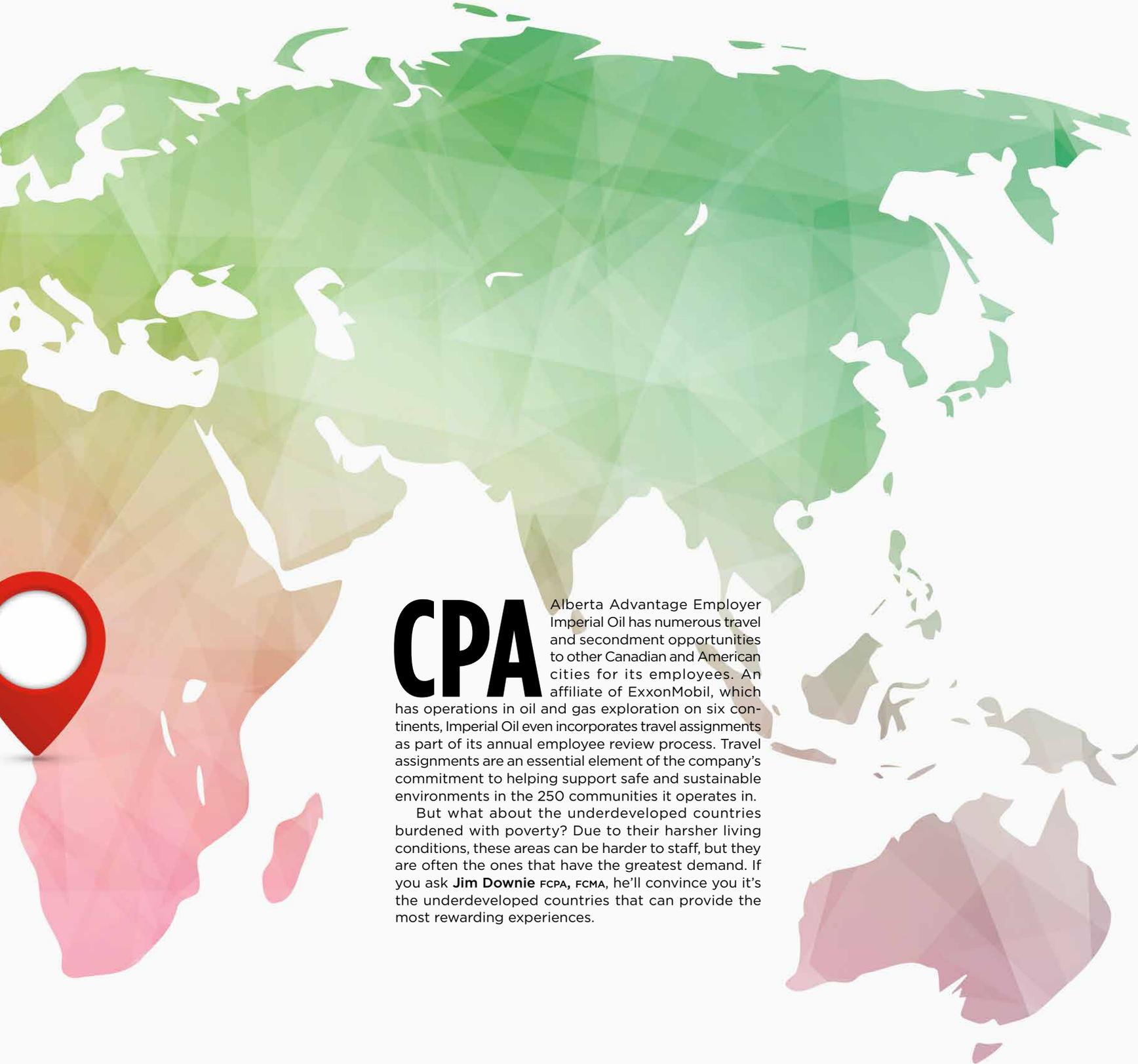
A stylized world map composed of low-poly shapes. The map is color-coded: North America is in shades of green and yellow, Europe and Africa are in shades of orange and red, and South America is in shades of pink and red. A prominent red location pin is placed on the east coast of Canada. Another partial red location pin is visible on the right edge of the map.

# CPAs on assignment: from east coast Canada to west coast Africa

By Andrew Moore **Photos by** Trudie Lee Photography

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Would you travel across the world for a chance to help those in need or to gain unique experience beneficial to your career? For Imperial Oil employees Jim Downie FCPA, FCMA and Donna Steckler CPA, CGA, the decision was a no-brainer



# CPA

Alberta Advantage Employer Imperial Oil has numerous travel and secondment opportunities to other Canadian and American cities for its employees. An affiliate of ExxonMobil, which has operations in oil and gas exploration on six continents, Imperial Oil even incorporates travel assignments as part of its annual employee review process. Travel assignments are an essential element of the company's commitment to helping support safe and sustainable environments in the 250 communities it operates in.

But what about the underdeveloped countries burdened with poverty? Due to their harsher living conditions, these areas can be harder to staff, but they are often the ones that have the greatest demand. If you ask **Jim Downie** FCPA, FCMA, he'll convince you it's the underdeveloped countries that can provide the most rewarding experiences.



Jim Downie FCPA, FCMA



## Luanda, Angola — Jim Downie FCPA, FCMA

No amount of research could prepare Jim for what he was about to experience on his three-year assignment to Angola, a republic on the western coast of southern Africa.

“We took a direct flight from Houston to Luanda [the capital city of Angola],” recalls Jim. “From high up it looks like the earth is gray, but as you get close, you realize it’s the density of the cinderblock houses. Suddenly you get a sense of the levels of poverty.”

One thing that immediately stood out to Jim upon arriving in Angola in 2012 was the kindness of his coworkers and people in the community. “I was amazed at how welcoming everyone was. Angola is a very social country; it’s amazing how everyone interacts with each other. I never once felt like an outsider,” says Jim.

As the Controller of ExxonMobil affiliate Esso Angola, Jim was responsible for overseeing financial activities for the company’s offshore oil and gas operations, as well as the development of the local Controller’s team in Luanda. The group consisted of 35 individuals, most of them natives of Angola. Outside of their day-to-day accounting operation, the team would head out to the streets and markets as part of Community Action Teams (CATs), an initiative run by Esso Angola. The CATs would participate in projects such as raising awareness for HIV, cleaning up the beaches, and volunteering at orphanages by setting up bunk beds and mosquito nets.

“It was a bit of a surprise how much volunteer work we were able to participate in,” says Jim. “There’s no better way to learn about the country than to immerse yourself in it.”

Between work, learning Portuguese (Angola is a Portuguese-speaking country), and helping out in the communities, Jim still managed to take advantage of some of the beauty Africa has to offer, such as the wine regions and safaris.

“When my wife and I chose to go to Africa, one thing that was appealing to us was that we could do a lot of travelling there,” says Jim. “We spent our vacations visiting new countries and seeing things like the Great Wildebeest Migration in Tanzania. The sights we saw were unbelievable.”

While his time in Angola lasted three years, the photos and memories of the children and people he met there will certainly last a lot longer. As for returning? “Maybe if I was earlier in my career,” answers Jim, who notes he will likely finish his career in Canada. “When you can combine what you do for a living with a chance to experience a different part of the world and make a difference while doing it, it makes the entire assignment so much more.”

“When you can combine what you do for a living with a chance to experience a different part of the world and make a difference while doing it, it makes the entire assignment so much more.”

Jim Downie FCPA, FCMA

## St. John's, Newfoundland — Donna Steckler CPA, CGA

If travelling halfway across the world isn't your cup of tea, maybe exploring your native land is. For **Donna Steckler CPA, CGA**, it was an assignment that transformed her life both professionally and personally. As a fresh graduate out of the University of Saskatchewan, Donna had just moved to Calgary when she was presented with the opportunity to go to St. John's as part of Imperial's Early Professional Development Program (EPDP). The EPDP consists of structured job rotations that provide increasingly challenging assignments, and is open to new graduates looking to gain experience in different areas of the business.

"I took this as a chance to learn about all of Imperial and ExxonMobil's offshore business—an opportunity I wouldn't get out here in Alberta," says Donna.

The opportunity paid off. In her first role as a part of the program, Donna worked in operations accounting for the Hibernia project, an oil field in the North Atlantic Ocean approximately 315 kilometres southeast of St. John's. The position demanded Donna learn a whole new set of skills, such as accruals related to ships, icebreakers, helicopters, and iceberg surveillance equipment—proficiencies that could only be learned while working on Canada's east coast.

"I learned so much in such a short period," says Donna. "The best part was where I was sitting. I sat kitty corner to the Hibernia Maintenance Manager, and just down the hall was the President of Hibernia. It was so valuable to be embedded in their day-to-day work."

Donna's next position was one she believes was a major stepping stone in her career: as Hibernia Planning Analyst, she worked directly with the President of ExxonMobil Canada on tasks for Hibernia and other Eastern operations.

"Working with senior leadership in the east was an incredibly valuable experience," says Donna. "Not only did I get a chance to see what was going to happen on the east coast before it happened, seeing how these leaders think and present was really beneficial. If you want to be someone who moves up in an organization, I think it's important to work with other leaders and see how they interact."

"Working with senior leadership in the east was an incredibly valuable experience. Not only did I get a chance to see what was going to happen on the east coast before it happened, seeing how these leaders think and present was really beneficial."

**Donna Steckler CPA, CGA**

Working directly with staff involved in on-the-ground operations was something Donna felt played to her strengths. Unlike Calgary where the ground crew might be several hundred kilometres away, Donna gained insight into some of the more technical aspects of the business through working with engineers and maintenance staff.

During her spare time, Donna even took to the ground herself: hiking the entire East Coast Trail, which at the time was more than 300 kilometres (the trail now totals 540 kilometres).

"I love hiking, so when I heard about the East Coast Trail I committed myself to doing the whole thing," says Donna. "It's just stunning what you see: whales, seals, icebergs, and beautiful landscapes."

In addition to joining a hiking group, Donna quickly made friends by joining the ExxonMobil softball team and participating in United Way fundraisers sponsored by the company. With a population of just over 100,000, St. John's is the kind of place where you're guaranteed to continuously run into people you know.

"One of the reasons I enjoyed my time there so much was that the people are so friendly," says Donna. "I had a co-worker bring me cookies and flowers to my house. There's a sense of community there that you just can't get in a larger city."

Imperial's EPDP provided Donna with the skills to develop in her role while exploring some of Canada's natural beauty. Currently a new mom back in Calgary, Donna has had to put travel assignments on hold temporarily, but down the road, it's definitely something she is going to consider again.

So whether you're a seasoned accountant with years of experience or a new grad looking to make a name for yourself, the learning gained through accepting a secondment opportunity can be so much greater than what you might get by staying in one spot. And both Jim and Donna agree that if the opportunity presents itself, and your current situation allows it, take it. 

Donna Steckler CPA, CGA



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# GENERATIONS OF EXCELLENCE

For the Lockhart and Gee families, accounting is a career that truly hits close to home

By Laura Ly Photography by Laughing Dog Photography and Trudie Lee Photography



## GROWING UP,

**Melissa Gee CPA, CA** and **Cory Lockhart CPA, CGA** were adamant that they would never be professional accountants. Both their fathers were professional accountants, and the profession was not one they were interested in.

However, chance encounters with the profession quickly changed their minds, and not only did they pursue and receive their designations, Melissa and Cory both ended up working with their dads in the same offices—showing how excellence can pass down from one generation to the next, and that in some families, the professional apple doesn't fall far from the tree.

Today, Melissa is Senior Manager at Collins Barrow Edmonton, where she manages the files of Collins Barrow Edmonton Partner **Tom Gee FCPA, FCA**—whom she also happens to call “dad” during the off hours. In university, Melissa initially enrolled in the Bachelor of Science program, but transferred to business after realizing she liked economics. “The concepts you learn in university are very different than applying your knowledge in the real world. I actually liked what I was doing and thought, ‘well, I can do this,’” recalls Melissa. She then got a job working at Kingston Ross Pasmak after university and decided to pursue her designation.

While Tom was careful to never pressure Melissa into following in his career footsteps, he's very proud that she did. “I'm definitely pleased that she decided to follow me into accounting because I think this is a great profession,” says Tom. “Accounting is the language of business. It really gives people a great opportunity to work with small businesses and large corporations.”

Melissa agrees that the diversity of the clients and work at Collins Barrow are her favourite aspects of the profession. “The thing about public practice that I love is that each client is different,” explains Melissa. “Each conversation and experience that I have with clients will be different from day-to-day.”

To see how a career in accounting can be diverse and full of varied experiences, one need only look at the path of Tom's more than 36-year career, which includes roles at several Edmonton firms, the Alberta Government,

“Accounting is the language of business. It really gives people a great opportunity to work with small businesses and large corporations.”

Tom Gee FCPA, FCA

and one of CPA Alberta's predecessor organizations, the Institute of Chartered Accountants of Alberta (ICAA). In addition, as a dedicated volunteer and advocate for the profession, he's served on numerous committees, task forces, and boards (including serving on the ICAA Council and representing the ICAA during meetings with CPA Canada), and taught accounting part-time at Grant McEwan, NAIT, University of Alberta, CPA Alberta, and the Edmonton campus of the University of Lethbridge.

Working closely with Tom has enabled Melissa, who has never been in any of Tom's classes, to see the professional side of her father. “I get to see him make jokes, teach other people, and I find that I'm always so impressed when he goes up and makes his presentation,” says Melissa. “There's no way I could do it. That's one side of him that I've never seen growing up.”

“I think one of the biggest obstacles that Melissa has had going through university, the accounting program, and in her working career is the fact that I'm her father,” relates Tom. “Having your dad have the same career path as you is both a good and a bad thing,” agrees Melissa. The advantages are always having a resource and source of knowledge to turn to; the disadvantage is having a higher level of pressure to uphold the standards and expectations that clients and colleagues may have for a second generation professional accountant.

Tom Gee FCPA, FCA and Melissa Gee CPA, CA



But Melissa is more than up to the challenge, and she always ensures she provides her own value to colleagues and clients. Tom emphasizes that he is continually impressed by the dedication and motivation Melissa displays towards her work—even despite being harder on her than he is on other colleagues. Tom likens the scenario to a sports coach being more demanding of their own child than other players on the team.

Working with Melissa and other professional accountants has been extremely rewarding, says Tom, reflecting on his career. “You see how dedicated they are and the volunteer work they do with the community, and it makes me glad that I am a CPA, CA and that I’m part of this profession.

“The CPA designation is a recognized professional designation that is highly respected by people in industry and other walks of life,” he adds. In addition, the dynamism of the profession ensures that CPAs will continually be challenged and keep learning throughout their careers.

Cory Lockhart agrees that the profession has no shortage of learning opportunities. One constant learning resource for Cory is his father and business partner, **Gregg Lockhart CPA, CGA**. Cory and Gregg are the Partners of Lockhart LLP, an accounting firm in Calgary that provides services to small and medium-sized businesses.

Like Melissa, Cory—a self-described “entrepreneur at heart”—didn’t want to be an accountant. He started his own small business while in university, and when the business didn’t grow the way he had hoped, he started working with Gregg at his firm. He later received his CGA designation and started a partnership with Gregg, who previously had his own firm, and the two created Lockhart LLP a few years ago. “Our personalities and relationship are such that it works better for us to be together than separate,” says Cory.

Gregg attributes his and Cory’s great working relationship to having skills that complement one another: “Cory’s a big picture guy, and I’m more a details guy,” relates Gregg. He praises Cory’s insight and ease of interacting with clients as being key elements of their successful partnership.

“My clients are excited to know that there’s family continuity there,” says Gregg. “Longtime clients of mine know my ethics and values. They’re excited thinking that Cory’s carrying on the same traditions.”

Cory admits that the accounting world is a familiar one for him as he spent many years watching his dad operate his accounting business from home. “Dinner table talk was always balance sheets, income statements,



Gregg Lockhart CPA, CGA (left) and Cory Lockhart CPA, CGA

“It’s a never-stop-learning profession. It’s not simply you have your letters and you can just sit for the next 30 or 40 years. It’s an ongoing process. A designation gives you credibility that allows you to improve yourself day-by-day.”

Gregg Lockhart CPA, CGA

tax returns—that was the language I knew,” he remembers. While his childhood may have provided him with the “language,” Cory credits his accounting education with providing him with the “backbone”: “If you can speak numbers, you have lots of opportunity to get a career going. It’s not niched. There are a lot of opportunities if you have that backbone in business in place,” says Cory.

Gregg says that as a “problem-solving family” who love puzzles and quizzes, the Lockharts have interests and skills that make them well-suited for accounting. “Every file is a new puzzle to solve. We enjoy trying to put together the puzzle the best we can for our clients,” says Gregg.

For Cory, in particular, the business side of accounting is where his passion lies. “I love all the moving parts of the business. I get to do accounting, which is great. I also get to live vicariously through our clients,” he says. “I love the depth and variety of the clients we have. I love seeing the wide spectrum of business that can operate, from professional to construction, to land development and not-for-profit—I can learn from the breadth of experience that they have.”

“It’s a never-stop-learning profession,” agrees Gregg. “It’s not simply you have your letters and you can just sit for the next 30 or 40 years. It’s an ongoing process. A designation gives you credibility that allows you to improve yourself day-by-day.”

“Pick a career path that you’ll enjoy.” It’s a common piece of advice for someone choosing their career path, and for the Lockharts and the Gees, the career path of the professional accountant is one that happens to run in the family.

“The designation provides a wide, open door to the future, and it’s a fantastic route to go down,” says Cory.

# Kicking it into

By Andrew Moore Photo by Laughing Dog Photography

CPA is more than just an accounting designation. The skills learned throughout the program can prepare you for roles in everything from tech to transportation. For Darren Wood CPA, CMA, it's this training that has allowed him to excel in his role at Jobber



# high gear



There's proof that a career in accounting is more than staring at numbers all day, look no further than **Darren Wood** CPA, CMA. As Director of Finance and Operations at Jobber, an Edmonton-based software startup, he can be found pitching in on everything from human resources to investor relations to trading foreign currency.

After graduating with a finance degree from the University of Alberta, Darren spent the early days of his career working alongside designated accountants. He witnessed firsthand the impact they had on helping achieve business objectives and was inspired to pursue his journey as a CPA.

"I was looking for something that applied to many different businesses and industries," says Darren. "Getting an accounting designation seemed like a great opportunity to develop a valuable technical skill set with a strong focus on strategic thinking."

His accounting education helped Darren develop the business acumen and versatility to excel at everything from large companies to startups and other entrepreneurial ventures. After leaving a large software company to start his own tech company, and meeting a few people in the software industry, Darren received an email from the CEO of Jobber regarding a new role focused on finance. A week later he was walking in the door to start his new job at Jobber.

Jobber provides user-friendly software for home service businesses. The application looks after team scheduling and many of the financial aspects of running a field service business. "Less paper, more awesome" is a tagline on Jobber's website. A few of the financial features of the software include batch invoicing, financial reporting, payment transactions, and summaries. The software even taps into QuickBooks Online or Xero, and allows companies to sync their clients, invoices, and line items. It's not hard to see how having a CPA on board can be a great benefit for the company.

"Working for a smaller company certainly increases the breadth of work. A high-growth startup can be hectic because of the speed it grows. It keeps things exciting, but managing the growth adds a layer of complexity."

In his current role, Darren looks after Jobber's financial performance, which includes simpler tasks like account reconciliations, budgeting, and payroll, but can also include more complex work such as trading foreign currencies, preparing investor communication, and forecasting. From time to time, the product developers will occasionally ask for advice on workflows or invoice presentation, which Darren admits can be a fun break.

There is often a perception that accounting attracts introverted personalities, but Darren finds it to be the opposite. For him, working with people is one of the best parts of his job.

"Non-accounting work is probably the most challenging and exciting," says Darren. "At this point, it's impractical to have a single person doing a lot of the overhead management such as accounting, finance, HR, and legal. As a result, I usually pitch in to help."

While working for a startup can be vastly different from working at a large firm or corporation, they both have their pros and cons. For Darren, having a wider area of responsibility is something that keeps him busy and engaged.

"Prior to working for Jobber, I had only worked at large organizations. Everyone there had a very specific, well-defined job," says Darren. "Working for a smaller company certainly increases the breadth of work. A high-growth startup can be hectic because of the speed it grows. It keeps things exciting, but managing the growth adds a layer of complexity."

The bottom line is that CPAs are not simply accountants. They can be masters of tech, commerce, sales, or even law, and are equipped with an arsenal of tools and traits that bring value to any aspect of business.

"The CPA Professional Education Program provides tangible skills, but it's also a different way of thinking. I can guarantee that no matter what you do, even if you leave the accounting profession, you will rely on the skills you learned as a CPA," says Darren. 

# 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/Subject-Area-Coverage](http://www.cpaalberta.ca/Become-a-CPA/Subject-Area-Coverage).

## 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.

### 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 areas of their 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:

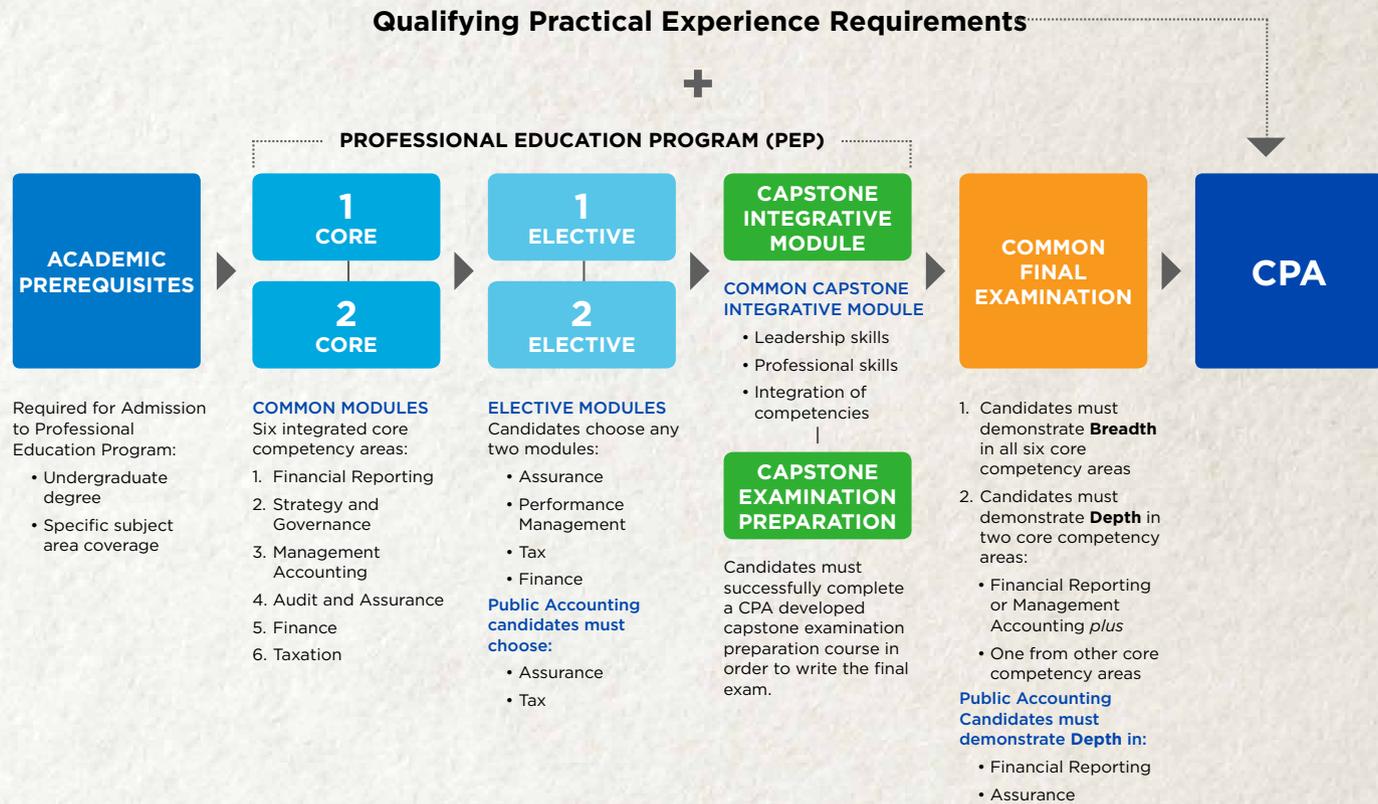
[www.cpawsb.ca/cpa-program-overview/pep/schedules](http://www.cpawsb.ca/cpa-program-overview/pep/schedules).

Late module registration is available (subject to availability and an additional fee); however, for Core One, it is mandatory to register at least four weeks prior to the start date.

For more information about becoming a CPA, please visit [www.cpaalberta.ca](http://www.cpaalberta.ca); call CPA Alberta at 1-855-306-9390 (toll-free); or email [gettingstarted@cpaalberta.ca](mailto:gettingstarted@cpaalberta.ca).

To inquire about your eligibility for CPA PEP and for admission support, please visit [www.cpawsb.ca](http://www.cpawsb.ca); call the CPAWSB at 1-866-420-2350 (toll-free); or email [cpaapplication@cpawsb.ca](mailto:cpaapplication@cpawsb.ca).

## CPA Professional Education Program Overview



### 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:

#### CPA preparatory courses

CPA preparatory courses (formerly known as the CPA Prerequisite Education Program) 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 study 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 1.855.306.9390 or email [gettingstarted@cpaalberta.ca](mailto:gettingstarted@cpaalberta.ca) to learn more about preparatory courses.

#### 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/Subject-Area-Coverage](http://www.cpaalberta.ca/Become-a-CPA/Subject-Area-Coverage). Students will only take the courses they need for entrance into CPA PEP.

### Module Zero

In addition to these bridging options, Module Zero is available to all candidates who meet the CPA competency requirements. The purpose of Module Zero is for candidates to refresh their knowledge of the prerequisite courses prior to starting their first CPA PEP module. All candidates enrolled in CPA PEP are granted access to Module Zero content five to seven business days after their admission application is approved. Module Zero will be available to all candidates until June 2017.

For more information, please visit [www.cpaawsb.ca/cpa-program-overview/pep/module-zero](http://www.cpaawsb.ca/cpa-program-overview/pep/module-zero).

## 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).

### There are five common elements that support both routes:

1. Candidates gain relevant experience and develop as a professional accountant in a minimum of 30 months.\*
2. Candidates' experience must be appropriately supervised.
3. Candidates must record detailed reports at regular intervals.
4. Candidates must meet and discuss their progress at least semi-annually with a CPA mentor.
5. Candidates' experience is assessed by the CPA profession.

*\*Practical experience requirements for public accounting practice and professional accounting practice are recognized separately from practical experience requirements for certification.*

## CPA Practical Experience Self-Assessment Tool

This tool is intended for individuals who have not yet had their experience assessed by a provincial/regional body but want to understand how their current or prospective position might align with the CPA technical competency requirements for purposes of the experience verification route.

To access this self-assessment tool, visit <https://pert.cpa-services.org/student/TrialAssessment>.

## CPA Mentorship

Mentorship is a mandatory component of the CPA Practical Experience Requirements (PER). The focus of the CPA mentorship program is to help future CPAs achieve their enabling competencies. CPA candidates who work in the CPA Pre-approved Program Route (PPR) will be matched with a CPA mentor by the organization that offers the program. CPA candidates who choose the Experience Verification Route (EVR) are required to seek out their own CPA mentor in order to find a successful fit. Recognition may be given for a total of up to 12 months of experience earned prior to registering with the profession. After that time, the qualifying period of practical experience cannot begin until CPA candidates have a CPA mentor. CPA Canada has developed a number of valuable resources to assist CPA candidates in finding a mentor.

Please visit [www.cpacanada.ca/practicalexperience](http://www.cpacanada.ca/practicalexperience) for more information.

## Common Final Examination

All candidates must write the Common Final Examination (CFE) to complete the CPA Professional Education Program (CPA PEP). The CFE will challenge candidates to demonstrate their competence by responding to simulations and business scenarios representing the kinds of challenges they've 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 CPA designation, visit [www.cpaalberta.ca/become-a-cpa](http://www.cpaalberta.ca/become-a-cpa).

## Enhance your skill set with the CPA Canada Advanced Certificate in Accounting and Finance (ACAF)

The CPA Canada Advanced Certificate in Accounting and Finance (ACAF) is a nationally recognized certificate for those seeking a challenging and rewarding career in accounting and finance, but not as qualified CPAs.

Certificate holders will qualify for intermediate-level accounting and finance positions in business, not-for-profit, and government, as well as CPA-supervised positions in public accounting. Developed by CPA Canada in close collaboration with employers, the ACAF program develops skills in the areas most in demand: strong technical abilities, hands-on experience with industry relevant software, and the workplace skills needed to be successful.

The ACAF builds on skills learned in two-year post-secondary accounting diploma programs or through equivalent on-the-job experience. The ACAF certification solidifies credentials and increases opportunities for advancement.

ACAF provides the applied technical and soft skills most prized by employers—and the certificate that proves it.

For more information on the Advanced Certificate in Accounting and Finance, visit [www.cpaalberta.ca/acaf](http://www.cpaalberta.ca/acaf).

## Two organizations with one goal in mind: helping you succeed in your future endeavours as a CPA

As a student pursuing your CPA designation, you'll likely hear two organizations' names mentioned quite often: **CPA Alberta** and the **CPA Western School of Business**.

**CPA  
Alberta**

As part of the CPA profession in Canada (with over 200,000 members), CPA Alberta is the professional organization for more than 28,000 designated accountants across the province. CPA Alberta operates under the provincial *Chartered Professional Accountants Act*, and is mandated to: protect the public; protect the integrity of the accounting profession regulated under the Act; promote and increase the competence of registrants; and regulate the conduct of registrants.

**CPA  
Western School  
of Business**

Once you've decided that you want to become a CPA, CPA Alberta will connect you with the CPA Western School of Business (CPAWSB). CPAWSB supports and educates CPA candidates enrolled in the CPA Professional Education Program (CPA PEP) in the four western provinces and in the Northwest Territories, Yukon, and Nunavut. Once you register to become a candidate, you'll start receiving the education you need to write the Common Final Examination (CFE).

After you have completed CPA PEP, successfully passed the CFE, and completed your practical experience requirements, you return to CPA Alberta and register to become a CPA.

If getting your CPA designation isn't the path for you, you can register with the CPA Western School of Business to become a student in the CPA Canada Advanced Certificate in Accounting and Finance (ACAF).



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# MAKING ALL THE RIGHT MOVES

By Andrew Moore Photo by Jeff Noon Photography

Decisions are not always easy to make, but if you listen to your gut—or, if you're Caleb Hagemeister, your aptitude test—it might just lead you in the right direction

**EVERY** year, the Alberta profession welcomes inspiring, energetic, new graduates eager to make their way into the business world. While 2016 graduate **Caleb Hagemeister** CPA is no exception, he can also boast of some rather prestigious recognition for someone so early in his career.

A successful writer of the inaugural Common Final Examination (CFE), Caleb is part of the first group of graduates to complete the CPA Professional Education Program (CPA PEP) in Alberta and use the CPA designation on its own. In addition to that honour, Caleb was also named to the National Honour Roll and was the 2016 CPA Western School of Business (CPAWSB) Regional Gold Medalist, which marks the top performance on the CFE in the western provinces.

Despite all of Caleb's recent success, the path to victory wasn't a straightforward one. He initially ignored the results of his high school aptitude test, which pointed towards a career in accounting or law: "I went to university for the first time to be a physics teacher, but after one education class I knew I wasn't cut out for it," says Caleb. "I took some time off school and learned the value of having an education and finding a career that was a better fit for me. In the end, I listened to my aptitude test and went back for an accounting degree."

It was a decision that paid off. However, putting your life on hold to go to school and earn a designation is not an easy choice, and can be hard on yourself and your family. Thankfully for Caleb—as a then-new recruit at MNP in Medicine Hat—he had many supporters there to help him along the way throughout CPA PEP, no matter how trivial the challenge.

"I've gone to a number of people for advice over these past four years," says Caleb. "I was pretty green when I started at MNP, and my co-workers helped show me how to contribute on a day-to-day basis, whether it be on compliance engagements or audits. The people you work with closely are the ones who help you achieve your goals. Hopefully, I can mentor future CPAs in the same way that these individuals have mentored me."

"The people you work with closely are the ones who help you achieve your goals. Hopefully, I can mentor future CPAs in the same way that these individuals have mentored me."



Post-designation life has freed up a little more time for Caleb, allowing him more opportunities to travel and spend time with family. He even bought a puppy with his girlfriend, which he admits is now taking up a good chunk of their lives. So what is Caleb's next move? During CPA PEP, Caleb took a keen interest in the tax elective and recently signed up for the first year of the CPA In-Depth Tax Program.

"The tax elective was something different than your usual Notice to Reader or audit engagement. It provided a different kind of opportunity from anything I had worked on previously," says Caleb. "By taking In-Depth Tax, I'll be heading down the road of tax specialist with my firm, MNP LLP. I hope I can achieve manager within a five-year time span and continue to grow my knowledge in tax."

CPA PEP gives you the skills you need to succeed not just in accounting but in business. While Caleb found an interest in tax, the CPA designation opens doors to massive opportunities in the business world. By making the most of the professional development and resources available from CPA Alberta, the career possibilities are limitless.

"If you're considering a career in accounting, make sure it's something you really want and give it your all," says Caleb. "I am so glad I went through the whole process and completed my designation. It's the beginning of lifelong learning." 



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-Jason Byrne, MBA '15  
Regional Director, Credit Structures, RBC Private Banking

# CPA EDUCATION FOUNDATION CORNER



## Being broke is no joke. So don't be.

The CPA Education Foundation believes in equipping students with the tools and resources they need to complete their business degrees successfully and pursue a CPA designation. We have scholarships for all types of students; whether your interests involve volunteering, excelling in leadership, academia, or mentorship, check out our scholarships and let us help you fund your dreams!

Visit our website for more information on these scholarships, as well as other scholarships funded by the CPA Education Foundation through post-secondary institutions and high schools in Alberta: [www.cpaalberta.ca/foundation](http://www.cpaalberta.ca/foundation).

The application deadline for all the following awards is **February 28, 2017**.

### Alberta post-secondary students:

#### Aboriginal Student Business Award

Value: \$2,500

One award available to an Aboriginal student with a minimum 3.0 GPA at the time of application and who is enrolled in business or commerce at a degree-granting post-secondary institution in Alberta.

#### David Bentley F CPA, F CA and Janet Bentley Post-secondary Excellence Award

Value: \$3,000 each

Two awards granted annually to students enrolled at any Alberta post-secondary institution in the second or third year of a business/commerce program approved for entry into the CPA Western School of Business, and preparing to enter the third or fourth year of their program. Selection is based on involvement in volunteer activities and an expressed interest in pursuing the CPA designation.

#### Don Wilson CA Memorial Scholarship

Value: \$2,000

One award granted annually to a fourth-year post-secondary student in Alberta or Saskatchewan who has secured a CPA training position with an industry employer. The student must have satisfactory academic standing and demonstrated leadership within the community or on campus.

#### Douglas R. Hagerman F CA Entrance Scholarship

Value: \$2,500

One award granted annually to a student from any Alberta post-secondary institution and entering his or her first year in a business/commerce program approved for entry into the CPA Western School of Business. The award amount is \$2,500 and is payable over three years: \$500 first year, \$750 second year, and \$1,250 third year. Renewal for the second and third years is based on satisfactory academic achievement in the prior year with a minimum course load of 24 credits.

#### Victor Dzurko Generations of Excellence Award

Value: \$2,500

One award available to a second, third, or fourth-year student enrolled in business or commerce at a degree-granting post-secondary institution in Alberta. Successful applicant will demonstrate an interest in pursuing the CPA designation and will have at least one family member who is (or was) a member, in good standing, of CPA Alberta or one or more of its legacy predecessors.

#### Peter Kruczko CPA, CA Award in Memory of Gordon Woodman F CA

Value: \$2,000

One award granted annually to a student who has completed at least one course related to the six core competencies for an accounting designation at the post-secondary level. Student must also demonstrate participation in volunteer activities and a minimum GPA of 2.5 on a minimum of 24 credits for the previous academic year.

**James C. Miller FCA Bursary in Accounting**  
Value: \$1,250

Two awards granted annually to two students enrolled in business or commerce at a degree-granting post-secondary institution in Alberta who intend to enter the CPA certification program and reside (or have previously resided) in Medicine Hat (preferred). Selection is based on academic excellence and community involvement.

**Kenneth Biggs FCA and Leona Biggs Scholarship**  
Value: \$2,000

One award granted annually to an 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 outside of external audit in a pre-approved program route. Selection is based on demonstrated satisfactory academic standing and leadership in the community or on campus.

**Lorenz Richer Currie Award**  
Value: \$1,500

One award granted annually to a third year Bachelor of Commerce or Bachelor of Management student enrolled with Athabasca University or Grande Prairie Regional College with a minimum GPA of 2.3 from the previous fall semester.

**New Canadian Achievement Award**  
Value: \$2,500

One award available to an individual who has become a new Canadian or permanent resident within the last five years (i.e., on or after January 1, 2012). This individual must be enrolled in business or commerce at a degree-granting post-secondary institution in Alberta or the CPA Professional Education Program (CPA PEP). This individual must also demonstrate satisfactory achievement in their academic or professional training program.

**Richard Schulli CA Memorial Scholarship**  
Value: \$2,500

One award granted annually to a 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 the CPA designation.

**Young Emerging Professionals Award**  
Value: \$2,500 each

Two awards available to post-secondary students enrolled in business or commerce at a degree-granting post-secondary institution in Alberta. In addition to satisfactory academic standing, applicants must also demonstrate the following qualities in their applications: professionalism, integrity, ethics, and leadership.

**Alberta high school students:****David Bentley FCPA, FCA and Janet Bentley High School Excellence Award**  
Value: \$2,500

One award granted annually to a student in Grade 12 at any Alberta high school. Preference will be given to applicants who will need to relocate within Alberta in order to attend a post-secondary institution. Selection is based on involvement in volunteer activities, satisfactory academic achievement, and an expressed interest in pursuing the CPA designation.

**Young Emerging Professionals Award**  
Value: \$1,500 each

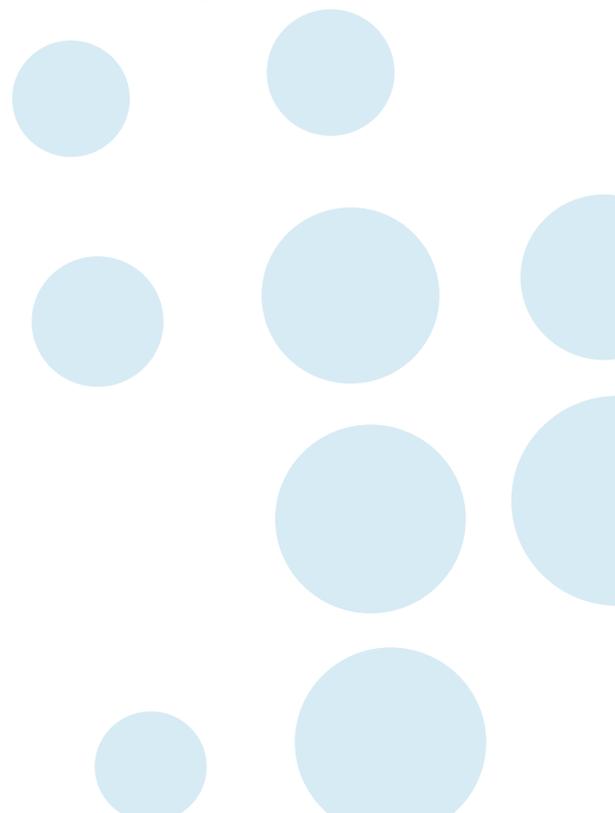
Two awards available to Alberta high school students. In addition to satisfactory academic standing, applicants must also demonstrate the following qualities in their applications: professionalism, integrity, ethics, and leadership.

**Alberta CPA Professional Education Program candidates:****David Bentley FCPA, FCA and Janet Bentley CPA PEP Excellence Award**  
Value: \$3,500

One award granted annually to a CPA Professional Education Program (CPA PEP) candidate who has secured and begun training as a designated accountant in a public practice setting. Selection is based on involvement in volunteer activities, satisfactory performance in CPA PEP modules and training, and an expressed interest in pursuing the CPA designation.

**New Canadian Achievement Award**  
Value: \$2,500

One award available to an individual who has become a new Canadian or permanent resident within the last five years (i.e., on or after January 1, 2012). This individual must be enrolled in business or commerce at a degree-granting post-secondary institution in Alberta or the CPA Professional Education Program (CPA PEP). This individual must also demonstrate satisfactory achievement in their academic or professional training program.



## No limits to ambition

Foundation scholarship recipient Chennae Lapatak talks culture, giving back, and the importance of building supportive networks

By Labonneau Dey Photo by LaughingDog Photography

### “I WILL PASS THE EXAM.”

These are the determined words of CPA hopeful **Chennae Lapatak** when she talks about writing the CPA Common Final Examination in the fall of 2016.

Chennae's confidence underpins an admirable drive to succeed. Originally from Saddle Lake First Nations Reserve, Chennae left her tight-knit community and moved to Edmonton at the age of 19 to attend NAIT. At the time, Chennae was on her own with her one-year-old daughter and had no family or friends in Edmonton to support her transition into a new, urban environment.

The decision to enroll in NAIT's Bachelor of Business Administration program was an easy one for Chennae, who knew that the CPA profession would provide stability, work-life balance, and endless opportunities. “I wanted a profession that would allow me to be home and present in my daughters' lives,” reflects Chennae, a staff accountant at Kingston Ross Pasnak LLP and a mother of three children. “There are so many career streams to pursue with a CPA designation.”

Chennae also began building a supportive network for herself and her growing family by being as active in the Indigenous community as her busy schedule would allow: she served as President of the Aboriginal Student Club at NAIT, mentored Edmonton Aboriginal high school students, and acted as Student Ambassador for the Aboriginal Student Center when Indigenous high school students from across Alberta visited NAIT. Chennae also sought cultural activities outside of her post-secondary environment as a means of



helping both herself and others. “I would always find the time to partake in ceremonies to nurture my spiritual side and be close to my roots,” she says. “It's important to me to be a role model for my daughters and other Aboriginal students.”

The support of the CPA Education Foundation also helped Chennae—the 2013 recipient of the Foundation's Aboriginal Student Award—ground herself and stay motivated with her studies. “After moving out of my parents' home, I had no idea how expensive living on my own would be. Receiving the Aboriginal Student Award showed me that all my hard work was paying off and gave me a sense of accomplishment that pushed me to finish strong during my last year at NAIT,” Chennae says.

Students like Chennae are part of the inspiration behind the CPA Education Foundation's new No Limits initiative, which seeks to connect Indigenous students to post-secondary studies in business and accounting. With the help of donations from CPA members, the Foundation will commit more than \$300,000 over two years to projects aimed at improving access to this career choice.

These projects are meant to encourage and support ambitious students like Chennae and help diversify the CPA profession. “I'm proud to be part of the small group of Aboriginal people who are pursuing this designation in Canada,” says Chennae. “There are a lot more barriers and adversities for Aboriginal students coming from remote reserves to obtain a post-secondary education. The assistance of the Foundation's program could help close the gap between adversity and achieving one's goal.”

No Limits will provide grants to Indigenous centres at Alberta post-secondary institutions to help deliver services for Indigenous students in business and accounting programs; partner with a provincial association that supports Indigenous Albertans seeking educational or employment opportunities in accounting or business-related fields; and offer scholarships and awards to Indigenous Albertans enrolled in recognized business degree programs at Alberta post-secondary institutions.

“[No Limits] will help strengthen the profession and support economic and personal development in Aboriginal communities,” says Chennae. 



## Diversity in the workplace starts with you

By Candy Khan

Diversity expert Candy Khan discusses the importance of inclusive language and behavior in progressive workplaces, and the active role we all play in creating respectful spaces for clients, colleagues, and stakeholders

WHEN I THINK ABOUT DIVERSITY in the workplace, the first thing that comes to mind is the memory of a specific meeting. The minutes from the previous meeting were being circulated, and the gentleman sitting next to me made this off-handed comment: “Pass me the minutes but not your gonorrhoea.” Everyone heard the statement; however, no one intervened, including the Chair of the meeting. When I approached the gentleman afterwards, he implied that it was just a joke.

You may have experienced a similar situation in the workplace. So, how and why do uncomfortable and potentially insensitive situations such as these happen in progressive workplaces with diverse groups? And how can they be avoided? While I cannot address all the potential reasons, I can touch upon some general guidelines.

To start, let’s talk about your social location. Social location has to do with your place in society. It includes your race, gender, sexuality, ability, social class, and cultural identity. Your social location provides you

with a framework that you use to see the world. If you have had limited experience working with a diverse group of people, you may struggle with acquiring different parts of your framework or appreciating diverse ways of being. However, our worldview and social location can change as we take on new social roles—for example, becoming a parent, volunteer, or student—and when we interact with others.

Many factors influence your own personal worldview and social location. Take my social location, for instance—I am in my late forties, middle class, able-bodied, educated, foreign-born, and a municipal worker. My social location provides me with advantages, but it also has limitations. For example, as a heterosexual woman, I will never know what it is like to be a sexual minority (Lesbian, Gay, Bisexual, and Transgender). Therefore, when I am working on a project to design a policy or program, I strive to ensure that I have a LGBT member in the group who can provide the missing perspective.

It’s important to be mindful of your social location when working with clients, colleagues, and stakeholders. Ensure that you create a welcoming environment and use inclusive language. Inclusive language is language that is free from words, phrases, and tones that reflect prejudiced, stereotyped or discriminatory views of particular people or groups. Examples of inclusive language and phrases include:

- persons with a disability (not “people with a disability”);
- humankind (rather than “mankind”);
- persons of colour (not “racialized workers”); and
- sexual orientation (rather than “sexual preference”).

The minor variations in the above phrases may seem trivial; however, our language is a reflection of our mental construct.

It’s also important to avoid micro-inequities—slights and snubs in which individuals are either singled out, overlooked, ignored, or otherwise discounted based on a fixed characteristic such as race or gender. Some examples of micro-inequities are: a weak handshake with little or no eye contact, praising an idea presented by one while ignoring the same idea presented by another, typing away at your cell phone or looking at your watch while someone is talking to you, or replying to someone with sarcasm.

The effects of micro-inequities are cumulative, and can cause the person you are trying to connect with to feel ignored and unimportant.

Creating a respectful and inclusive environment for everyone is not that difficult. It can be as simple as saying “hello.” For instance, there is an African tribe that communicates without exchanging words. Two people only need to look at each other, and through eye contact, one says, “I see you”; the other responds with, “I am here.” What an inclusive way to welcome people into our offices and homes—wouldn’t you agree? 



Candy Khan is a knowledgeable and committed professional in the areas of diversity, inclusion, and intercultural training. Candy has her Master’s of Education in Theoretical, Cultural and International Studies from the University of Alberta (U of A), and has worked with newcomers to Canada for over 15 years. She is currently enrolled in the PhD program at the U of A, and works as a Senior Diversity and Inclusion Consultant at the City of Edmonton.



### ...MAKE THE MOST OF THEM HERE.

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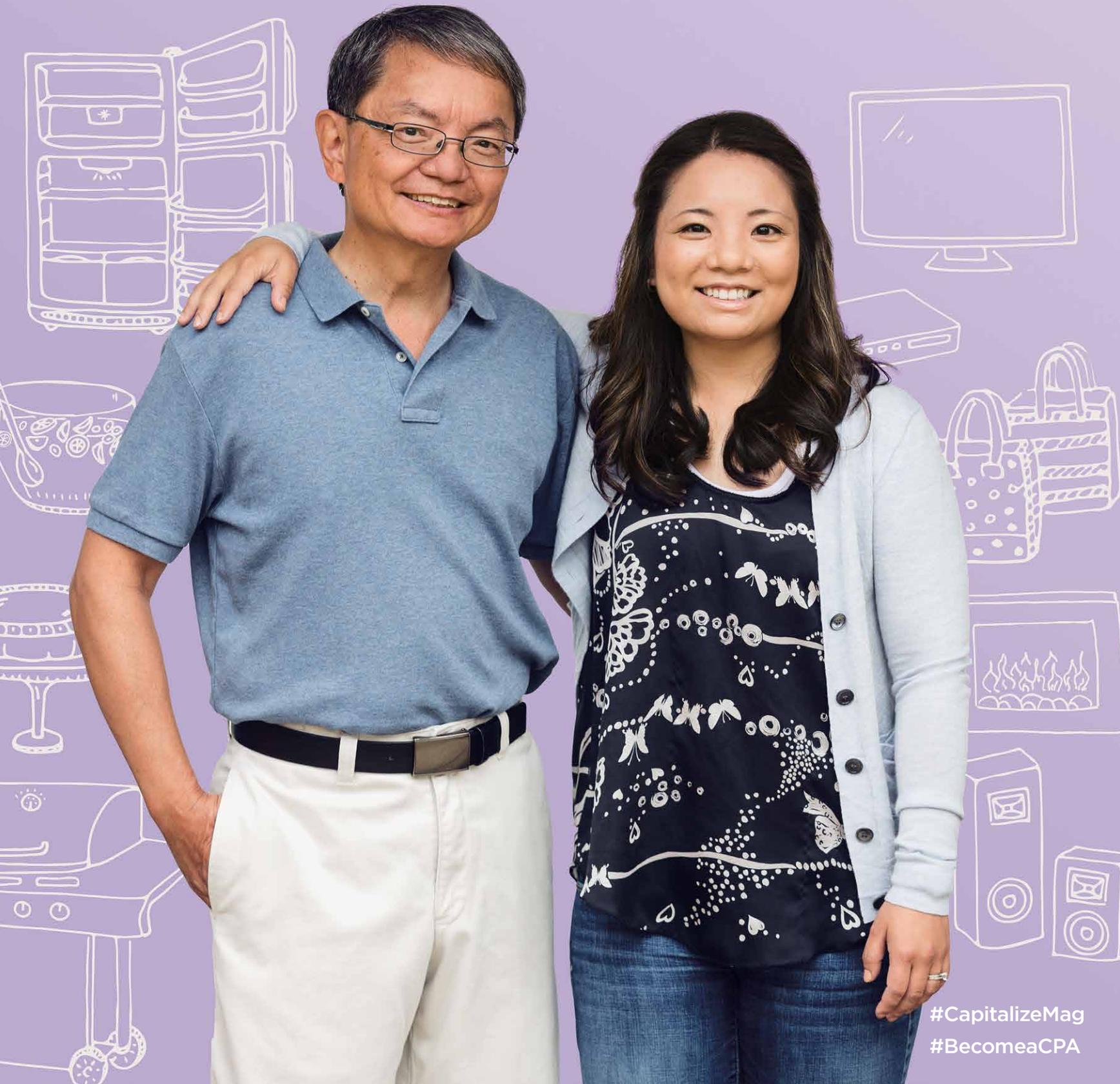
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