

Corporate Saving Program – Terms and Conditions

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1. Corporate Saving Program Overview

The Corporate Savings Program is a bulk pre-purchase loyalty savings program where organization can purchase a credit that can be used to purchase courses, conferences, and other eligible products at a set percent discount from CPA Alberta for a one-year from the date of purchase.

A Corporate Savings Program can be purchased by anyone who can then designate whomever they choose to use the credit to register for eligible products by adding them to the Corporate Savings Program list of eligible purchasers.

There are three Corporate Savings Program levels: Standard, Enhanced and Premium. The earned discount is based on the level (Standard, Enhanced, or Premium) selected and purchased.

Corporate Savings Programs Details and Information

Program Features	Standard		Enhanced		Premium	
Organization size	Small		Medium		Large	
Discount off Regular Price	20%		25%		30%	
Discount Term	One year		One year		One year	
Program Price	\$2,500		\$8,000		\$13,500	
# People taking PD from CPA Alberta	2	5	7	10	13	15
Estimated CPD hours purchased	42	105	147	210	273	315
Estimated Days of Professional Development	6	15	21	30	39	45
Purchase Price and Credit Amount	\$2,500		\$8,000		\$13,500	
Eligible to Purchase Credit Top up	Yes		Yes		Yes	
Discount Expiry	One (1) year from purchase date		One (1) year from purchase date		One (1) year from purchase date	
Annual Renewal	Required		Required		Required	
Upgrade	At any time		At any time		Not Applicable	
Downgrade	Not Applicable		At the end of the term		At the end of the term	

For information purposes only. Estimates are based on a seven hour live virtual course.

2. Purchasing a Corporate Savings Program

Organizations are permitted to purchase one Corporate Savings Program per year at one of the specified price points listed below. This program will entitle those indicated by the purchasing organization to use the program credit to purchase and register for eligible products from CPA Alberta at a prescribed discount off the regular price of courses, conferences, and other eligible products from CPA Alberta.

The price points and applicable discounts are:

Program	Purchase Price	Discount
Standard	\$2,500	20%
Enhanced	\$8,000	25%
Premium	\$13,500	30%

Full payment must be received prior to the program being set-up and activated. Once payment is received and processed, CPA Alberta will set up access to the appropriate Corporate Savings Program. The purchasing organization must then add individuals who are permitted access to the credit as designated by the purchasing organization's Program Administrator ¹.

3. Corporate Savings Program Payment, Credit and Term

a. Payment Terms

Payment in full is required to set up and use the Corporate Savings Program.

Please note that all Corporate Savings programs are not subject to GST. However, all courses purchased using the Corporate Savings Programs credits are subject to GST. While CPAA understands that some organizations are GST exempt, courses are attended by the individual, not the organization, and are thus subject to GST regardless of employer or employment status. This is the position taken by the Canada Revenue Agency.

A Corporate Savings Program credit cannot be used to purchase additional Corporate Savings Program credit.

Corporate Savings Programs credit cannot be combined with any other payment options including but not limited to credit card, cheque, cash or money order.

b. Additional Credit Purchase

If additional credit is required to complete a product registration, Program Administrator must contact CPA Alberta to add credit to their organization's Corporate Savings Program account. If the additional credit takes the program to the next level, the Program Administrator must indicate to CPA Alberta that they either would like to remain at the same level or they intend to upgrade. Please see upgrade details in Program Considerations.

¹ Program Administrator is one person assigned to manage the organizations Corporate Savings Program account.

c. [Program Term](#)

The Corporate Savings Program term is one-year from the date of purchase. At the end of the year, the purchasing organization can renew at the same level, upgrade, downgrade or discontinue the program. At the end of the one-year term, if there is a remaining credit in the Corporate Savings Program account, and if the purchasing organization has not renewed at the same level or higher, the credit will remain on the account Corporate Savings Program however, the discount will expire. The credit can still be used to purchase a course, conference, or other eligible products at the regular price.

4. [Corporate Saving Program Administration](#)

a. [Set up](#)

The selected Corporate Savings Program will be set up by CPA Alberta once full payment is received. Please allow a minimum of 5 business days for the request to be processed.

Please note that during the peak professional development season, requests will take longer. As a result, if the purchase of the Corporate Savings Program is close the date of a course, conference, or other eligible product, the product may be sold-out or full once set-up is complete and thus another selection may be required. CPA Alberta cannot guarantee course, conference or other eligible products will be available upon completion of the set-up of the Corporate Savings Program.

Once the Corporate Savings Program has been set up by CPA Alberta, The Program Administrator must add individuals who are permitted to use the credit and receive the discount.

Eligible product registrations can proceed upon completion of all steps in the set-up process by both CPA Alberta and the purchasing organization. Please note that all CPA Alberta Professional development terms and conditions for registering for eligible products apply to all transactions.

A Corporate Savings Program discount cannot be retroactively added to a previously purchased course, conference, or other eligible products.

b. [Management by the Purchasing Organization](#)

Each organization will provide CPA Alberta with the name of an individual who will be the primary Program Administrator. The program administrator will be responsible for:

- Adding people who are eligible to purchase under the program,
- Removing people who are no longer eligible to purchase under the program,
- Adding credit to the organization's program,
- Requesting upgrades, downgrades, renewals, and discontinuation of the programs.

c. [Changing the Program Administrator](#)

Please contact CPA Alberta to change the Program Administrator.

5. Corporate Savings Program Considerations

a. Term

All programs have a term of one year from date of purchase.

b. Annual Renewal

To maintain the discount purchased, renewal at or above the initial purchase is required each year.

c. Purchasing Additional Credit

The Corporate Savings Program Administrator can contact CPA Alberta to purchase additional Credit to be used at the same discounted rate as the initial Program purchased. The purchase of additional credit does not extend the original discount expiry dates which is one year from the initial Corporate Savings Program purchase. See Expiration details below.

d. Upgrading

If you have purchased the Standard Corporate Savings Program, you can upgrade to the Enhanced Corporate Savings Program at any time by increasing your credit by contacting CPA Alberta.

If you have purchased the Enhanced Corporate Savings Program, you can upgrade to the Premium Corporate Savings Program at any time by increasing your credit by contacting CPA Alberta.

Upgrading to a higher-level Corporate Savings Program can be requested at anytime. Upgrading does not extend or change the term of the program. The term continues to be one-year from the initial purchase date.

Please note that previous registrations will not be adjusted to the new percent discount.

e. Downgrading

If you have purchased the Enhanced Corporate Savings Program, you can downgrade to the Standard Corporate Savings Program at the end of the term by indicating your intent to downgrade a minimum of 10 business days prior to the end of the term only.

If you have purchased the Premium Corporate Savings Program, you can downgrade to the Enhanced Corporate Savings Program at the end of the term by indicating your intent to downgrade a minimum of 10 business days prior to the end of the term.

Downgrading to a lower-level Corporate Saving Program is only permitted at the end of term. Downgrading does not extend or change the term of the program. The term continues to be one-year from the initial purchase date.

Please note that previous registrations will not be adjusted to the new percent discount.

f. Expiration

Although the total dollar amount purchased does not expire, the discount earned will expire one year from the date of purchase unless the same or higher Program is purchased for another one-year term. All discounts will be removed, and all credits will remain on the account and can

be used to purchase regular priced professional development programs. Remaining credits are not refundable.

g. **Discontinuation**

You can discontinue your participation in the Corporate Savings Program at the end of the one-year term. All discounts will be removed, and all credits will remain on the account and can be used to purchase regular priced professional development programs. Remaining credits are not refundable.

h. **Discount Parameters**

All discounts are on the regular price of all included products and cannot be combined with any promotional offers including but not limited to one time promo codes, advertised promotions, bundle and save, early bird pricing and any other promotion advertised by CPA Alberta.

i. **Fees**

There are no additional fees to participate in the Corporate Savings Program. The purchase amount of the Corporate Savings Program is the credit amount received. .

6. **Corporate Savings Program Refunds**

All CPA Alberta Corporate Savings Programs are non-refundable and non-transferable.

7. **Corporate Savings Program Inclusions**

The following programs, courses, elearning, conferences, events and learning opportunities are included in the Corporate Savings Program:

- Live in-person and virtual courses
- Elearning and On-demand Learning
- Select Conferences
- Select Certificate Programs
- Select Assessments

Please note that all eligible products listed are subject to change at anytime. Eligible products prices and availability are subject to change at anytime.

8. **Corporate Savings Program Exclusions**

The following programs, courses, elearning, conferences, events and learning opportunities are excluded from the Corporate Savings Program:

- Executive Programs
- Select Conferences
- Select Certificate Programs
- Select Assessments
- Special Events
- CPA Assist Programs
- CPA Canada and other provincial professional development courses, conferences, and other learning opportunities
- Chapter Events
- Customized Training

- Courses, conferences, learning programs and events that indicate that they are not included in the Corporate Savings Program
- Member dues, practice review fees, professional fees, late fees, penalties or any other fee assessed by CPA Alberta

9. Registering for Eligible Products

To register for an eligible product, an individual that has been set up by the Program Administrator for the Corporate Savings Program, must sign in using their CPA Alberta member ID and password. This is to ensure that the CPD hours are registered to the correct individual.

If you are not a member of CPA Alberta, you will need to create a profile and provide the details to your program administrator so that you can register using the Corporate Savings Program.

Do not use your Firm ID as an individual must be registered for a course.

Program administrators will not be able to register individuals in eligible products.

A Corporate Savings Program discount cannot be retroactively added to a previously purchased course, conference, or other eligible products.

All [Professional Development Terms and Conditions](#) apply.

10. Registration Change Requests

a. Withdrawals and Refunds

All course withdrawals and resulting refunds are administered based on CPA Alberta's Professional Development Terms and Conditions. Refunds will be provided as a credit to the Corporate Savings Program account.

b. Course Transfers

All course transfers are administered based on CPA Alberta's Professional Development Terms and Conditions. Any resulting refund will be provided as a credit to the Corporate Savings Program account. Any resulting payment will be withdrawn from the Corporate Savings Program credit.

c. Substitutions

All course substitutions are administered based on CPA Alberta's Professional Development Terms and Conditions. Any resulting refund will be provided as a credit to the Corporate Savings Program account. Any resulting payment will be withdrawn from the Corporate Savings Program credit.

d. No Shows

Refunds and credits will not be processed for registrants who do not attend the registered event, course, program or learning opportunity as per CPA Alberta's Professional Development Terms and Conditions.

11. Cancellations by CPA Alberta

All cancellations by CPA Alberta are administered based on CPA Alberta's Professional Development Terms and Conditions. Any resulting refund will be provided as a credit to the Corporate Savings Program.

12. Reserved Rights

CPA Alberta reserves the right to change or discontinue any product or program at any time.

13. Professional Development Terms and Conditions

CPA Alberta's Professional Development Terms and Conditions as set out for all learning programs provided by CPA Alberta apply in all circumstances. Please review at <https://www.cpaalberta.ca/Professional-Development/General-PD-Information/Terms-and-Conditions>.

14. Privacy Statement

Your privacy is very important to CPA Alberta. Please refer to the privacy statement on CPA Alberta's website.

15. Terms and Conditions Updates and Changes

CPAA reserves the right to change and update all Terms & Conditions without notice.