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MAY/JUNE 2024

Soaring to new heights

Meet CPABC's newest FCPAs
and award winners



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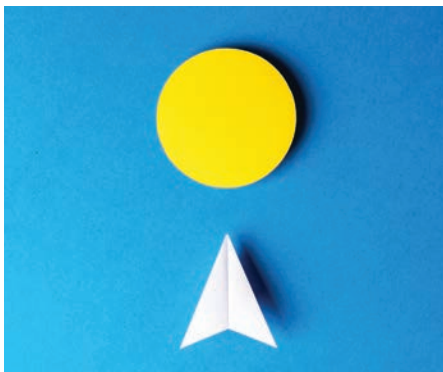
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Bobo Zhao Photography



CPABC **IN**FOCUS

May/June 2024, Vol. 12, No. 3

CPABC in Focus is the flagship magazine of BC's chartered professional accountants.

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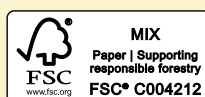
Inquiries and Letters

Contact us at infocusmag@bccpa.ca.

About

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Demonstrating the Value of the Designation

As my tenure as chair draws to a close, I'd like to take a moment to thank my fellow board members and CPABC's senior leadership team for their hard work and collaboration over the past year. It has been a pleasure working with each of you, and it's with my full confidence in your ongoing efforts that I'll be turning things over to my successor at CPABC's virtual AGM on June 20 (see page 6 for details).

I know many of these ongoing efforts will be focused on the CPA pipeline, as it is in the public interest for CPABC to continue striving to meet the high demand expected for CPAs over the next few years. This means maintaining recruitment activities targeted at post-secondary students, Indigenous peoples, and workforce career changers; increasing outreach to high school students and newcomers with international education and experience; and collaborating with other organizations, particularly Indigenous organizations, on various initiatives (see pages 34-35).

Amid ongoing labour market constraints, it's vital that we continue to communicate the value of the CPA designation to prospective students. One of the ways we demonstrate this value is by showcasing the diverse career opportunities open to current and future CPAs and the high calibre and expertise of our membership. Speaking of which, you'll find profiles of our newest Member Recognition Program honourees in our cover story on pages 14-29. It was my pleasure to congratulate these outstanding individuals at CPABC's recent Member Recognition Dinner (pages 54-55).

Looking back over my tenure, I'm grateful for the many opportunities I've had to connect with members across the province. It was a truly rewarding experience. With this in mind, I encourage all of you to find ways to engage with the profession, whether by attending chapter events, serving on a CPABC committee, or volunteering with CPABC's recruitment team. The CPA community is full of talented, driven individuals, and I've learned so much from them. ■



Chris Gimpel, CPA, CA
CPABC Chair

Responding to Change and Being Resilient

As always, CPABC remains focused on delivering on its mandate of protecting the public, and that includes ensuring that stakeholders, such as the government and the broader business community, understand CPABC's role as a regulator. With this in mind, important priorities over the coming fiscal year will include enhancing certain administrative processes to ensure that we comply with the new *International Credentials Recognition Act*; implementing the remaining Cullen Commission recommendations; providing continued guidance on the adoption of the new quality management standards; and supporting the national New Certification Program development project.

We will also continue to source systems, processes, and technologies that will leverage diverse delivery models to enhance operational effectiveness. To that end, we'll be looking to automate workflows and processes and explore the use of AI where appropriate and without compromising data security. And speaking of AI, be sure to read the last instalment of our "Let's Chat about AI" series on pages 30-33.

As we undertake these activities, we will of course continue to provide valuable and relevant services to our members, candidates, and students. Given that May 6-12 is Mental Health Week in Canada, one service I'd like to highlight here is our TELUS Health One Member Assistance Program, which gives each of you (and your immediate family members) access to free and confidential counselling and mental wellness resources. I'd also like to draw your attention to the article on pages 36-41, which features highlights from CPABC's latest research on mental wellness at work, and the infographic on pages 42-43, which looks at workplace mental health in Canada. It's important to talk about mental wellness, and I encourage each of you to keep the conversation going.

Before signing off, I'd like to thank Chris for his exceptional service as board chair over the past year. He has been a passionate, insightful, and committed leader throughout our collaboration on provincial, regional, and national initiatives. ■



Lori Mathison, FCPA, FCGA, LLB
CPABC President & CEO

NOTES & NEWS

AGM ANNOUNCEMENTS

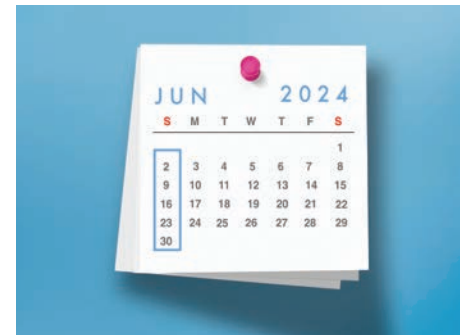
Save the Dates: AGMs for CPABC and CPA Yukon

British Columbia: June 20, 2024

CPABC will hold its 2023-2024 annual general meeting (AGM) virtually on Thursday, June 20, 2024. Details and meeting materials will be posted to bccpa.ca in late May.

Yukon: June 17, 2024

CPA Yukon will hold its 2023-2024 AGM in person in Whitehorse on Monday, June 17, 2024. Details and meeting materials will be posted to bccpa.ca/yukon in late May.



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MEMBER RECOGNITION

Shine the Spotlight on an Outstanding CPA

Nominate them for a CPABC Member Recognition Award

Do you know a fellow CPA who's making impressive contributions to the business community, the accounting profession, and charitable organizations? If so, we encourage you to champion their positive impact by nominating them for CPABC's Member Recognition Program in one of the following categories:

- Early Achievement
- Distinguished Service
- Honorary CPA
- Fellowship
- Lifetime Achievement

All nominations for the 2024 program must be received by CPABC by 4:00 p.m. on Monday, September 16, 2024. To learn more about the different awards and the nomination process, visit bccpa.ca/member-services/recognition-program.



Warchi/Stock/Getty Images

Nominate them for a 2024 BC C-Suite Award

Each year, *Business in Vancouver* recognizes and celebrates exceptional CEOs and CFOs in British Columbia at its BC C-Suite Awards gala. Honourees are chosen based on their performance relating to corporate growth through strategic decision-making, as well as overall performance and execution, sound business principles, and reporting. *Business in Vancouver* is currently seeking nominees for the following awards:

Award categories for CEOs:

- Enterprise Company (revenues > \$500 million)
- Large Company (revenues of \$100 million to \$500 million)
- Mid-Market Company (revenues of \$50 million to \$100 million)
- Small Firm (revenues of \$10 million to \$50 million)
- Publicly Accountable
- Non-Profit

Award categories for CFOs:

- Large Public Company (revenues > \$75 million)
- Small Public Company (revenues < \$75 million)
- Large Private Company (revenues > \$75 million)
- Small Private Company (revenues < \$75 million)
- Publicly Accountable
- Non-Profit
- Transformation Agent

Visit biv.com/upcoming-events/c-suite-awards to nominate a CPA for a BC C-Suite Award. Nominations (including supporting materials) must be received by *Business in Vancouver* by noon on May 31, 2024.

Six Outstanding Leaders Honoured at 25th Annual IWIB Awards



The 2024 Influential Women in Business Award honourees (l to r): Patti Glass, Shelley Gray, Carol Lee, Cathy Mackay, Linda Lupini, and Cathy Thorpe. Photo courtesy of *Business in Vancouver*.

CPABC was a proud partnering sponsor of the 2024 Influential Women in Business (IWIB) Awards luncheon, which took place at the Fairmont Waterfront Hotel in Vancouver on March 8, 2024, to coincide with International Women's Day. Presented by *Business in Vancouver*, the IWIB Awards celebrate outstanding female senior executives and entrepreneurs in British Columbia.

Nominate a fellow CPA for an IWIB Award

Nominations for the 2025 Influential Women in Business Awards are open until 5:00 p.m. on August 30, 2024. Visit biv.com/iwib for details.

During the luncheon, the following individuals were recognized for their leadership in their respective fields and their contributions to British Columbia's broader business community:

- **Patti Glass** – VP of corporate marketing & communications, Grosvenor;
- **Shelley Gray** – CEO, SkilledTradesBC;
- **Carol Lee** – Chair, Vancouver Chinatown Foundation;
- **Linda Lupini** – Global VP of employee experience, Copperleaf Technologies;
- **Cathy Mackay** – COO (now CEO), EDI Environmental Dynamics; and
- **Cathy Thorpe** – President and CEO, Nurse Next Door.

To learn more about the honourees, visit biv.com/iwib.

REGULATORY REMINDERS

IMPORTANT:

**2024/2025 Member Dues Are Now Past Due
DEADLINE WAS APRIL 1, 2024**

CPABC acknowledges and thanks the majority of members who paid their dues on time. Timely payment minimizes the administrative cost of following up on collections.

If you have not yet paid your 2024/2025 member dues, please do so before May 31, 2024, to avoid the administration fee, which places the additional cost of collections on those members who pay late.

An email notification was sent to each member in late February 2024 indicating that the payment deadline for 2024/2025 member dues was April 1, 2024. If you did not receive this email, log in to services.bccpa.ca to ensure that your email address is up to date in your member profile. As required by the *CPABC Bylaws*, members must provide a current email address and immediately notify CPABC of any changes (see right for more details). This is to ensure that you receive important regulatory messages from CPABC.

To view your member dues notice online, visit services.bccpa.ca. You can print the notice for your records and pay your dues electronically.



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Keep Your Contact Information Current



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Is your contact information up to date?

This is a friendly reminder that the *CPABC Bylaws* require members and candidates (students enrolled in the CPA Professional Education Program) to provide CPABC with the following contact information:

- Your current email address;
- Your current mailing address;
- Your current business or employment address; and
- Your current municipality of residence.

You are required to keep your contact information up to date by immediately informing CPABC of any changes. This is to ensure that you don't miss any important communications from CPABC, including information about your annual dues and other fees. Additionally, every member with a public practice licence is required to provide CPABC with the current street address for every authorized practising office in BC.

How to update your contact information

- **Members:** Log in to services.bccpa.ca and select the "Profile" tab. Contact CPABC at memberrecords@bccpa.ca if you need assistance.
- **Public practitioners:** To update a firm address, office address, or professional accounting corporation address, contact publicpracticelicensing@bccpa.ca.
- **Candidates:** Log in to the My CPA Portal at my.cpawsb.ca. Contact CPAWSB at cpaapplication@cpawsb.ca if you need assistance.

To protect your privacy and security, be sure to use the email address that is on record with CPABC whenever you communicate with us via email.

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CASE COMPETITION

Students Flex Problem-Solving Skills at 2024 CPABC Business Case Competition



Each year, the CPABC Business Case Competition provides post-secondary students throughout British Columbia with the opportunity to challenge themselves by applying their financial savvy and critical thinking skills to business case analyses.

In 2024, which marked the eleventh year of the event, 33 post-secondary teams, each made up of three to four students representing a range of academic years, participated in the virtual first round of the competition, which took place in January. For this first-round case, teams were given 48 hours to review a proposed business expansion opportunity and provide their recommendations using qualitative and quantitative analyses.

After the first round, eight teams from four post-secondary institutions—Capilano University, Langara College, Simon Fraser University, and the University of British Columbia—advanced to the final round of the competition, which took place at UBC’s Vancouver campus on March 16.

During this final round, which was held in partnership with the UBC Sauder School of Business, teams had three hours to analyze a new case involving a potential business partnership. Each team presented their recommendations to our expert judging panel of CPABC members: Alykhan Bandali, CPA; June Lee, CPA, CMA; Linda Lee, CPA, CMA; Carmen Ma, CPA; Jenny Mi, CPA; and Gail Thiessen, CPA, CMA.

The judges assessed the competitors on their presentation style, case knowledge, strategic implementation, and innovative thinking, as well as their handling of a rapid-fire question-and-answer period. To ensure fair and unbiased judging, teams were not allowed to mention their school names in their presentations and judges were not told which school each team was representing.

Prizes were awarded to the top three teams:

- **First place:** “Team Ace Consulting” from SFU, represented by Draco Dominus, Jake Melo Valinho, Sofia Li, and Troy Cheah.
- **Second place:** “Team AFO Partners” from UBC, represented by Ishan Bhandal, Michael Martorella, and Vaibhav Sohni.
- **Third place:** “Team HAWK Consulting” from Langara, represented by Mateus Mota, Olivia Chia Yu Nie, Oshiorenuu (Zayyan) Shaibu, and Peter Jae Woan Kim.

CPABC congratulates the winning teams and thanks the judges and all participants for making this event such a success.

Front row (l-r): Judges Carmen Ma, CPA; Jenny Mi, CPA; Gail Thiessen, CPA, CMA; June Lee, CPA, CMA; Alykhan Bandali, CPA; and Linda Lee, CPA, CMA, with Sharon Hummel, CPABC’s student recruitment manager. Back rows: Members of the eight teams who competed in the final round of the 2024 CPABC Business Case Competition. Photo by J. Chan Photography.

VOLUNTEER OPPORTUNITIES

Share Your CPA Story at CPABC's Recruitment Events



If you're a passionate CPA member or candidate who wants to help CPABC promote the profession and showcase the diverse career opportunities available to future CPAs, here are two ways you can get involved as a volunteer:

Become a CPA Ambassador

The volunteer opportunities for member and candidate ambassadors include attending networking events, representing CPABC at career fairs, being a panellist or keynote speaker at gala dinners, and more. To sign up, visit bccpa.ca/ambassador.

Be a guest speaker for high school presentations

CPABC's student recruitment team visits high schools throughout the school year to give presentations about the CPA profession, and we're always looking for enthusiastic volunteers to join us.

We're also looking for guest speakers to join us at our presentations to high school students involved in programs run by JA British Columbia and YELL. Most of these speaking opportunities are for members and candidates who are entrepreneurs or have experience working with or for entrepreneurs, but some are open to all members and candidates.

For more information on being a guest speaker, email the student recruitment team at recruitment@bccpa.ca with the subject line "Guest Speaker Opportunities."

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 sale to Air Ambulance Services	 sale to Metalworking Equipment Distributor	 sale to Forest Seedlings	 sale to Hydroelectrical Power Generation	 sale to Furniture Manufacturer

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NOTES & NEWS


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bccpa.ca/newsroom

Anti-Money Laundering



bccpa.ca/aml

Financial Literacy



bccpa.ca/finlit

Public Practice Knowledge Base



bccpa.ca/kbase

Chapters



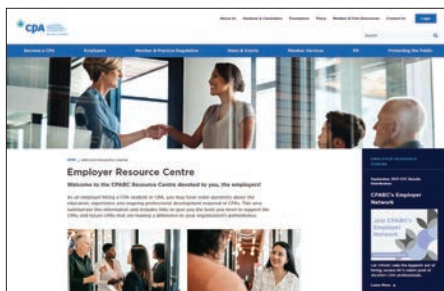
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Protecting the Public



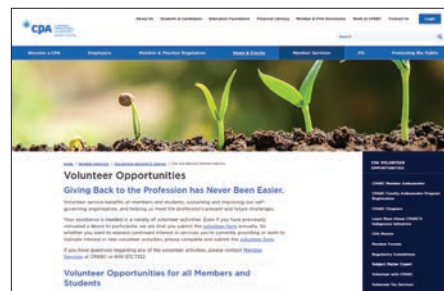
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Employer Resource Centre



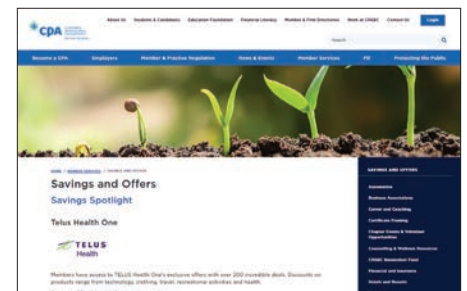
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Soaring to New Heights

Meet the 27 CPAs chosen for Member Recognition in 2023. CPABC celebrates their outstanding leadership, volunteerism, and career achievements.

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Early Achievement AWARD

The CPABC Early Achievement Award celebrates members who distinguish themselves early in their CPA careers through professional achievement and volunteer service, with an emphasis on professional accomplishments.

Shailene Caparas, CPA, CGA

Shailene is the director of finance for the Anglican Diocese of New Westminster. Since taking on this role in 2020, she has led modernization efforts that have achieved significant savings and boosted efficiencies for the organization's 60+ parishes. She also has her own CPA firm, specializing in serving faith-based communities, and is a licensed clergy member.

Notably, after the onset of the COVID-19 pandemic, Shailene provided expert guidance that subsequently factored into the amendments made to the Canada Emergency Wage Subsidy eligibility requirements. She further successfully lobbied for amendments to the Canada Emergency Business Account eligibility requirements. Combined, these changes benefited organizations across Canada by delivering much-needed funds during a time of crisis.

Since obtaining her designation in 2013, Shailene has volunteered tirelessly to support numerous not-for-profit organizations, including the Primate's World Relief and Development Fund, OneBook, the Canadian Bible Society (BC & Yukon), World-Wide Missions Society of BC, and the Filipino-Canadian associations AFCA-BC, PICPA Vancouver, and UFCABC. She is also the founder of SeedCare International Ministries, a charity that supports hundreds of marginalized communities worldwide.



"Shailene has dedicated her life to serving under-resourced ministries and created innovative ways for smaller Christian churches to access CPA knowledge as well as helping them keep their charitable status intact."

— The Reverend John W. Lucas, President, The Maranatha Evangelistic Association and World-Wide Missions Society of BC

Aaron Cheung, CPA, CA

As a senior manager at Deloitte and leader of the firm's accounting operations advisory practice in Vancouver, Aaron contributes significantly to client engagements—assessing challenges and risks, identifying opportunities, and providing key recommendations to drive improvement.

Before joining Deloitte in 2015, Aaron was a finance manager for Loblaw Companies Ltd., where he increased efficiency and streamlined processes. Notably, he led a complex transition that saw a substantial finance team move from Loblaw's head office in Brampton to its shared services office in Winnipeg.

Aaron has consistently inspired others since earning his designation in 2012, and his professionalism, impactful mentorship, and commitment to excellence garnered him Deloitte's Inspirational Practitioner Award in 2021.

Also a certified management consultant (CMC), Aaron actively promotes relationship-building between CPAs and CMCs. He extends his passion for relationship-building beyond work as well, volunteering for the Vancouver Chinatown Foundation and serving as a director for Dixon Transition Society, which provides a safe haven for women and children.



"Aaron is a passionate, professional, intelligent, resourceful, responsible, compassionate, committed, and dedicated individual. We are very grateful for his service."

— Monika Verma, Executive Director, Dixon Transition Society

Early Achievement AWARD



Linda Christie, CPA, CMA

Linda is the vice-president of finance at Redbrick Technologies, a technology firm in Victoria that focuses on empowering digital entrepreneurs. She has leveraged her passion for innovation as a key member of Redbrick’s mergers and acquisitions team, delivering critical strategic advice—in finance, legal, and tax matters—that has facilitated the purchase of three US companies over the past three years.

Prior to joining Redbrick in 2016, Linda was the controller at Autopro Automation Consultants, an electrical engineering design and consulting firm. There, she guided external accountants in building a transfer pricing model that drove the company’s international expansion.

Linda has made giving back a core commitment since obtaining her designation in 2013. Past contributions include advising and guiding Ishtar Women’s Resource Society, a shelter and support group for women and children fleeing domestic violence, through the process of outsourcing its accounting functions. Current contributions include providing sound financial counsel as treasurer of the Beaver Elk Environmental Stewards Society, which has grown from nine to 160 members during her tenure over the past four years.



“As our organization expanded, adding 19 new corporations over seven years, Linda’s adaptability and resilience have been outstanding. She has been instrumental in ensuring the smooth financial operations of these new entities.”

— Toba Sowden, Founder & CEO, Redbrick Technologies Inc.



Bryce Davis, CPA, CA

Bryce is a partner with MNP in Vancouver and a managing director in its corporate finance group. His sought-after counsel on mergers, acquisitions, and business sales demonstrates his ability to analyze complex data and deliver innovative solutions that enhance financial performance for both his clients and the firm.

As a leader and mentor within the corporate finance team, Bryce extends his influence beyond traditional roles. His guidance and mentorship facilitate the professional growth and development of the team members around him and instil a culture of excellence within the firm.

Bryce also shares his leadership skills with individuals outside the office. He is a founding member of Young Association for Corporate Growth British Columbia, and he has been actively engaged in student recruitment and mentorship since earning his designation in 2013.

A dedicated volunteer in the community as well, Bryce serves on organizing committees for multiple charitable organizations and has supported the mission of the Multiple Sclerosis Society of Canada for more than 10 years.



“Bryce’s exceptional leadership and strategic thinking set him apart. His vision and guidance have not only moved the corporate finance team forward but have also significantly contributed to the growth of the firm.”

— Michael Sileika, CPA, CA, National Lead, Valuation Services, Partner, MNP LLP

Amy Duncan, CPA, CGA

Amy is a partner at DMCL Chartered Professional Accountants in Surrey, where her expertise extends across advisory, assurance, and taxation services for a diverse clientele that includes owner-managed businesses, non-profit organizations, and individuals.

Known as a force for continuous improvement and innovation, Amy demonstrates her commitment to excellence through her contributions to DMCL's Standards and Guidance Committee and numerous forward-thinking initiatives. She is also highly sought after for her deep understanding of the non-profit sector and frequently presents to her firm, directors, donors, and the business community on the accounting standards for non-profit organizations.

Still, it is Amy's passion for education and her commitment to the next generation of CPAs that is perhaps her most notable achievement. Since obtaining her designation in 2013, she has served as an online facilitator for the CPA Professional Education Program and dedicated countless hours to CPA recruitment and mentorship.

This passion for giving back also extends to the greater community, with Amy recently completing a five-year term on the board of the Surrey Food Bank.



★ “We have benefited greatly from Amy’s strategic thinking as she has demonstrated ‘the big picture’ many times. She has been an exemplary board member who has in every way contributed to the stability of the organization.”

— Conni Kilfoil, President of the Board of Directors of the Surrey Food Bank

Zahra Kolia, CPA, CA (SA)

Zahra is the vice-president of finance at Vancouver-based Copperleaf Technologies Inc., which provides decision analytics software solutions to companies that manage critical infrastructure. With her strategic mindset, she has played a pivotal role in tripling the finance team in support of Copperleaf’s rapid growth.

Zahra obtained her designation in South Africa in 2018 and transferred from KPMG Cape Town to KPMG Vancouver that same year. She joined Copperleaf in 2019 and has already made an indelible mark on the company by leading its conversion to international financial reporting standards, implementing financial controls, and co-ordinating a multi-year external audit process—all of which enabled Copperleaf to finalize its IPO in only seven months.

Zahra also champions ESG within the organization and leads several sustainability initiatives, including the integration of TCFD and UNGC principles into the company’s strategy and operations. Moreover, she is a driving force for cultural change, working on Copperleaf’s diversity, equity, and inclusion roadmap and overseeing employee learning opportunities and development funds as a member of its Grow with Copperleaf Committee.



★ “In a short number of years, Zahra has distinguished herself through an exemplary work ethic and outstanding professional growth and collegiality. She has showcased her unique ability to expand beyond the finance team and make a meaningful impact throughout the organization.”

— Michael Calyniuk, FCPA, FCA, CITP, ICD.D, President, MEC Dynamics Inc. and Chair, Copperleaf Audit and Risk Committee

CPABC Member Recognition Program

CPABC is proud to recognize its leaders, volunteers, and educators.

DO YOU KNOW AN OUTSTANDING CPA?
Nominate them for a Member Recognition Award.

EACH YEAR, AWARDS ARE GRANTED IN THE FOLLOWING CATEGORIES:

★ FELLOWSHIP DESIGNATION

Recognizes members who have earned distinction and brought honour to the profession by meeting at least two of the following criteria: exceptional service to the profession, extraordinary career achievements, and/or exemplary contributions to the community.

★ EARLY ACHIEVEMENT AWARD

Recognizes members early in their CPA career who are seen as role models, bring honour to the profession and have distinguished themselves in one or more of the following: professional achievement, leadership, visibility of the profession, or community service.

★ DISTINGUISHED SERVICE AWARD

Recognizes members who have been actively involved for many years in volunteer activities for their dedication, commitment, and outstanding contributions either to the CPA profession or to one or more not-for-profit or charitable organizations.

★ LIFETIME ACHIEVEMENT AWARD

Recognizes the extraordinary leadership, dedication, and achievements of members who have received their Fellowship and continue to make significant contributions in a broad range of areas.

NOMINATION DEADLINE

4:00 p.m. | Monday, September 16, 2024



Early Achievement AWARD

Jason Lum, CPA

Jason is a partner at Deloitte in Vancouver, where he has a proven track record for results and a reputation for exceptional technical, analytical, and team-building skills.

In particular, Jason has developed a highly specialized and sought-after skill set as an auditor and advisor for technology and telecommunications businesses—remarkably, he has also served in that capacity for one of Deloitte’s largest clients since joining the firm in 2013. In addition, senior staff regularly consult him when tackling complex audit and accounting issues, and he plays a critical role in the firm’s request for proposal process.

On the people side of the equation, Jason leads multiple project teams at Deloitte, and his collaborative approach to problem-solving has both increased productivity and learning. His passion for people development extends to the next generation of CPAs as well. Since obtaining his designation in 2016, Jason has actively promoted the profession through UBC alumni events, and he not only recruits new CPA candidates to Deloitte but also provides ongoing mentorship and coaching.



★ “Jason played a pivotal role as my mentor throughout my journey in obtaining my CPA designation. Whenever self-doubt crept in, he generously provided unwavering support and guided me through the CPA approach to address any issues that arose.”

— Hayley Shostak, CPA, Audit Manager, Deloitte

Brent Wolfe, CPA

Brent was just 28 years old when he became a partner at MNP in 2018, making him one of the youngest partners in the firm’s 65-year history. Today, he serves as MNP’s national director of public companies, responsible for leading strategic development, regulatory compliance, audit quality, and business development.

Known for his ability to streamline complex audits, Brent regularly provides clients with valued counsel on accounting best practices. He extends his expertise beyond MNP as well, sharing his deep knowledge of policy initiatives and capital markets trends as a member of the British Columbia Securities Commission’s Corporate Finance Stakeholder Forum.

Another area of focus for Brent is people development. He guides MNP’s recruitment and retention efforts and promotes the profession at campus events, and it was under his direction that the firm partnered with the Canadian Securities Exchange to develop a networking program for young professionals. Additionally, since 2018, Brent has led his team to unprecedented growth in terms of both revenue and size; he has also increased engagement through regular check-ins and creative team-building activities.



★ “Brent has demonstrated both commitment and passion to our firm and to his community. He is an excellent example of what it means to be a true business leader and CPA.”

— Dan Trotter, FCPA, FCA, Regional Managing Partner, Vancouver Region, MNP LLP

Distinguished Service 

Distinguished Service AWARD

The CPABC Distinguished Service Award honours members who have been actively involved as volunteers for many years, recognizing their dedication, commitment, and outstanding contributions to the CPA profession and/or their unstinting support to one or more not-for-profit organizations.



Miranda Cook, CPA, CGA

Miranda is a trusted financial professional whose work as a director with RHN CPA in Richmond centres on a true passion for estate planning. And she is equally known for being an enthusiastic contributor to the profession—inspiring and leading a new crop of CPAs both at her firm and through her work with the CPABC Richmond/South Delta Chapter.

Miranda has volunteered with the chapter for over five years. As its chair from 2021 to 2023, she drove greater collaboration and organization throughout the region, helped boost student recruitment efforts and mentorship opportunities, and encouraged networking.

A dedicated and impactful volunteer, Miranda also provides invaluable leadership to organizations such as the Society of Trust and Estate Practitioners and Toastmasters International. She’s also an innovator, having founded the Underused Housing Tax Practitioner Group and the Richmond Babies Group. Through the latter, which serves more than 50 new mothers, Miranda provides essential information and assistance by personally ensuring that participants are prepared to address the financial, tax, and benefit changes that come with parenthood.



“Miranda’s exceptional ability to lead and inspire her fellow professionals has undoubtedly contributed to the personal and professional growth of countless members.”

— Bruce Hurst, FCPA, FCGA, Director, Reid Hurst Nagy



Alan Cosgrave, CPA, CGA

Alan is a regional managing partner for MNP in Vancouver, responsible for overseeing the firm’s advisory services practice across BC. At the same time, he prioritizes professional and community service.

A long-standing volunteer with the Institute of Internal Auditors (Vancouver Chapter), Alan has boosted member engagement with a variety of popular in-person events since becoming chapter president in 2022. He is also a longtime contributor to CPABC, mentoring articling students and new CPAs to ensure that they have the tools needed to succeed.

In the community, Alan leverages his Irish roots and his financial acumen as a dedicated board member and past president of the CelticFest Vancouver Society. He’s also the treasurer of the Ireland-Canada Chamber of Commerce Vancouver and has been pivotal in growing the chamber’s membership while serving on its Executive Committee. Alan has also contributed to the success of many fundraising initiatives for both the BC Children’s Hospital Foundation and the BC/Yukon Chapter of the Leukemia and Lymphoma Society of Canada; he has also served on the society’s Executive Leadership and Fundraising committees since 2020.



“The impact of Alan’s work for the Leukemia & Lymphoma Society of Canada and our flagship event and fundraising campaign ‘Light The Night’ cannot be overstated, as his commitment has not only raised vital funds but has also fostered a sense of unity and purpose among our team and the broader community.”

— Erika Kinast, Fund Development Director, BC/Yukon Region Leukemia & Lymphoma Society of Canada

Ronald (Ron) Royston, CPA, CA

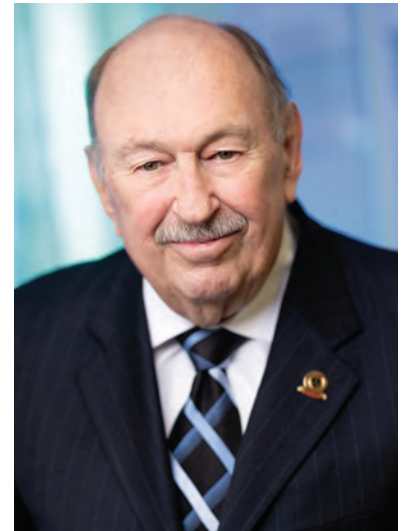
By the time he retired from Grant Thornton's partnership in 2009, Ron had been volunteering in both the profession and the community for decades.

Active with his legacy accounting body, ICABC, for 20 years, Ron applied his keen listening and problem-solving skills to the work of diverse committees and groups, including the Personnel and School of Accountancy committees and the Accounting for Government Subsidized Housing Group.

In the community, Ron provided critical leadership to the board of St. John Ambulance Canada (BC & Yukon) for more than 30 years. This included developing a governance model and integrated financial reporting process while chairing its Finance Committee. He also volunteered at the national level.

Even more extensive is Ron's commitment to North Shore Rescue, which spans more than 50 years, 900 search and rescue missions, and long-standing (and ongoing) service as treasurer, through which he has ensured the team's growth and financial security.

Ron's numerous accolades for service include the 125th Anniversary of the Confederation of Canada Medal, ICABC's CA of the Year Award, the Order of St. John (Knight), and the Queen Elizabeth II Golden and Diamond Jubilee medals.




"Ron's guidance for the past 40 years as treasurer has provided the financial leadership that has greatly assisted the team in being one of the leading rescue teams in Canada."

— Gerry Brewer, Retired City Manager, City of North Vancouver & Founding Member, North Shore Rescue


Fellowship



Duncan Sinclair photo courtesy of Deloitte; Trisha Tannis photo by Whapaxx Creative; all other photos by Kent Kallberg Studios.



Ross Turnbull,
CPA, CA, CBV, CFA, ICD.D
**Vice President, Director,
Portfolio Manager**



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Member-Canadian Investor Protection Fund

Odlum Brown Model Portfolio: A Proven Track Record

Average Monthly Performance ¹		Compound Annual Returns ²	
UP MONTHS (63% OF TIME)	DOWN MONTHS (37% OF TIME)	Since December 15, 1994	Since December 15, 1994
3.0%	3.4%	14.1%	8.5%
	-1.9%		
	-3.6%		

■ Odlum Brown Model Portfolio* ■ S&P/TSX Total Return Index

¹Performance measured mid-month from December 1994 - March 2024. ²As of March 15, 2024. *The Odlum Brown Model Portfolio is an all-equity portfolio that was established by the Odlum Brown Equity Research Department on December 15, 1994 with a hypothetical investment of \$250,000. It showcases how we believe individual security recommendations may be used within the context of a client portfolio. The Model also provides a basis with which to measure the quality of our advice and the effectiveness of our disciplined investment strategy. Trades are made using the closing price on the day a change is announced. Performance figures do not include any allowance for fees. Past performance is not indicative of future performance.

Fellowship

The title of Fellow formally recognizes members who have earned distinction and brought honour to the profession by meeting at least two of the following criteria: exceptional service to the profession, extraordinary career achievements, and exemplary contributions to the community.



Gina Arsens, FCPA, FCA

A multitasking business leader who exemplifies cutting-edge entrepreneurial skills, Gina is the CEO of Yumasoy Foods Ltd., an all-natural plant-based food company she founded in Vancouver in 2021.

Prior to launching Yumasoy, Gina was the inaugural CFO of Ideon Technologies. This was preceded by a three-year tenure as the CFO of the Digital Supercluster, an independent not-for-profit organization that accelerates the advancement of digital technology in Canada. During her time with the Digital Supercluster, Gina helped establish vital financial management policies and procedures to secure \$125 million in critical funding.

Her deep wealth of experience spans other sectors as well. She helped drive the digital evolution of Finning International while serving as its global finance leader, and she was a transformative financial force at Normac Appraisals, Klein Systems Group, and Xantrex Technology.

A treasured role model for the next generation of leaders, Gina has worked with the Prospera Women's Leadership Network to provide networking, mentorship, and career growth opportunities that empower young women. She has also extended her sought-after leadership to boards such as YWCA Metro Vancouver and the Real Estate Institute of Canada (Vancouver Chapter).



“One of Gina’s stand-out attributes is her ability to inspire and empower women within her team and also across the broader organization. Her impact is profound, fostering an environment where all can thrive and contribute to the organization’s success.”

— Gary Agnew, CEO and Co-Founder, Ideon Technologies



Gregory (Greg) Buck, FCPA, FCA

Greg is the founding partner of KEY Financial Group LLP in Abbotsford and Kamloops, where he is widely respected as an innovator, known for testing technology that drives efficiency in public practice and generously sharing his extensive knowledge with other small public practitioners.

Greg also inspires the next generation of CPAs as a mentor and educator. In addition to teaching business and accounting at the University of the Fraser Valley for almost two decades, he has instructed and authored numerous CPABC professional development courses since 2004. He’s also an organizer and presenter for CPABC’s Abbotsford Practitioner’s Forum, which he introduced to the Fraser Valley in 2015. Through his myriad efforts, Greg has fostered countless successful CPA careers.

His own career began with a controllership position at Swift Air. Later, as a partner at LGH & Co., he tripled his clientele and guided a merger with MNP; he was then a partner at MNP before founding KEY in 2004.

Greg’s ongoing passion for planes inspired years of volunteerism with the Abbotsford International Airshow, culminating in a term as president. His extensive community service also includes long-standing support of Ducks Unlimited and 20 years as a proud Rotarian.



“Greg made it clear he was available for any discussion on the topics that a young public practitioner might require. This level of commitment is not recorded in the records of professional development but is immeasurable in its impact for those of us growing our practices.”

— Ken Forcier, CPA, CGA, Kenneth A. Forcier CPA Inc.

Ian P. Cameron, FCPA, FCA

Ian recently retired as the senior vice-president of finance and CFO of Methanex in Vancouver, where he'd established himself as a professional of high integrity, credibility, and acumen. He joined Methanex, a global producer and supplier of methanol, in 1993—working in a series of key finance roles before rising to CFO in 2003. For 20 years, Ian served on the multibillion-dollar company's six-person executive team and oversaw its corporate finance function.

Under his leadership, Methanex implemented a complex, global, cloud-based ERP finance system. He also helped guide the company as it opened new plants in Louisiana, making Methanex one of the first companies to capitalize on the increased availability of affordable natural gas in the United States; to this day, the expansion continues to foster the company's growth and sustainability efforts.

Ian is also renowned for his unwavering commitment to mentorship, having worked tirelessly to develop and promote the next generation of CPAs at Methanex, where his collaborative nature, strategic thinking, and clear communication style proved invaluable. In 2017, he received the CFO of the Year Award (Large Public Company category) from *Business in Vancouver* in recognition of his excellence in business and finance.



★ “Leadership is truly where Ian shines. Whether in the boardroom with investors, in the office with financial partners, or among meetings with Methanex’s worldwide partners, he knew how to convey complex financial concepts to any audience.”

— Jason Bower, CPA, CA, Audit Partner, Technology, Media and Telecommunications, KPMG Vancouver

Geoffrey (Geoff) Dodds, FCPA, FCA

As a partner with Buckley Dodds CPA in Vancouver, which he co-founded in 1995, Geoff shares strategic insights with—and finds innovative solutions for—a wide variety of businesses and individuals. At both Buckley Dodds and Clarkson Gordon (EY), where he previously worked, Geoff became known for his deep understanding of the not-for-profit sector and governance matters, as well as for his skills as an auditor. His knowledge and abilities were celebrated in 2021 and 2022, when Geoff was named one of *Business in Vancouver*'s 500 Most Influential Business Leaders in BC.

Throughout his career, Geoff has played a vital role in the development of the designation. Appointed to the inaugural board of CPABC in 2015, he served in a variety of key positions, including as audit committee chair, board treasurer, and board chair. As a testament to his reputation for strategic thinking and consensus building, Geoff was recently asked to chair the CPA Canadian Council of Chairs Subcommittee, advancing the review of the national Collaboration Accord for the Canadian profession.

Highly active in the community as well, Geoff has volunteered with numerous not-for-profits throughout his career and currently serves as a director and treasurer of the Disability Foundation.



★ “Geoff was tireless in volunteering his time to advance our discussions. He routinely sought to bridge differences in views by exploring the possibilities for common ground. The long-term best interests of our profession served as his guiding light.”

— Richard Olfert,* Past Chair, CPA Canada Board of Directors (*Richard is an FCPA, FCA, in Manitoba)

Fellowship



Paul Hazra, FCPA, FCA

Paul's current role as CFO of Pattison Food Group is the latest highlight in an impressive 16-year career with the Jim Pattison Group.

While CFO of The News Group from 2008 to 2014, Paul oversaw numerous industry-changing acquisitions that led the organization to become the largest distributor of periodicals in North America. As CFO of Save-On-Foods from 2014 to 2021, he created new analytics, enterprise planning, and risk management functions and oversaw a number of major acquisitions.

In 2021, Paul oversaw the financial and legal consolidation of the various Pattison food companies that led to the formation of Pattison Food Group (PFG). As the CFO of PFG, he has provided financial, acquisition, and strategic leadership to support the company's rapid growth from 130 retail stores to more than 300, along with its expansion into the health, manufacturing, and restaurant industries.

Paul obtained his designation in Scotland and began his career with PwC before moving to Vancouver with the firm in 1997. Since 2013, he has served as a member of GlobalScot, Scotland's international business leader network, providing valued insights on the western Canadian business landscape to Scottish companies and government representatives.



"Paul uses his remarkable professional training and skills, his out-of-the-box thinking, his strategic mindset, and his people-centric approach to achieve incredible results."

— Michael J. Korenberg, Chair & Managing Director, Wreath Group Holdings Inc.



Elaine M.L. Kam, FCPA, FCA

As the assistant vice-president of taxation at HSBC Bank Canada,* Elaine has guided the tax review of some of HSBC's largest, most consequential, and complex transactions. Prior to joining HSBC in 1997, she worked as a tax manager at both Coopers & Lybrand (PwC) and EY.

With her deep expertise, her commitment to excellence, and her reputation for diligence and careful analysis, Elaine oversees all aspects of income tax at HSBC Bank Canada—from domestic to international. In addition, she provides staff at HSBC with valued mentorship, learning, and development opportunities, including through her involvement with HSBC's Toastmasters club.

Elaine's commitment to development is also evident in her extensive volunteer contributions to the profession, which include helping CPABC develop and refine key policies, including good character review guidelines, CPD requirements, and the admissions practices of internationally trained accountants.

Equally engaged in the community, Elaine volunteers with organizations such as JA British Columbia, which recognized her with a 15-Year Volunteer Service Award in 2022, and AdvantageBC. She has extended her reach beyond BC as well, participating in 100-kilometre treks in Morocco, Mongolia, and Greenland to raise funds for WaterAid Canada.

**Subsequent to this writing, the Royal Bank of Canada purchased HSBC Bank Canada. Elaine is now senior director, tax advisory and planning at the Royal Bank of Canada.*



"Elaine has committed to gruelling treks in the Sahara Desert, the Gobi Desert, and the Arctic Circle in order to raise funds to provide safe water to those who are less fortunate. She has committed to these exceptional activities because she cares."

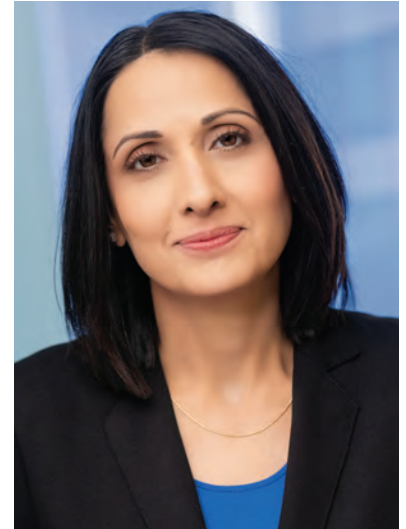
— Carlene Hornby Allen, FCPA, FCA, Partner, KPMG

Amanjit (Am) Lidder, FCPA, FCA

Am is the senior vice-president of tax services for MNP, responsible for the strategic direction of the firm's service line across Canada. Under her leadership over the past five years, MNP has seen its tax revenue increase two-fold and the size of its tax team grow by almost 80%. Am also provides leadership as a dedicated mentor to MNP's tax professionals, reflecting her commitment to developing the next generation of CPAs.

Since launching her career in Prince George in 1996, Am has worked diligently to make tax matters more accessible. Known for her exceptional communication skills, she has spoken at consultations in Ottawa in advance of federal budgets and written for the Canadian Tax Foundation. She is a past member of CPA Canada's Income Tax Education Committee and a current member of its Tax Advisory Committee, identifying and helping to resolve tax policy and administration issues with federal authorities.

Among her achievements, Am holds the distinction of being the first female partner elected to serve on MNP's board of directors. In 2016, the Surrey Board of Trade recognized her outstanding professional accomplishments by honouring her with a Surrey Women in Business Award in the professional category.



★ “Am is a prominent leader in the tax profession. She exemplifies professionalism, integrity, and technical acumen, and she has a passion for mentorship that aids to inspire and further enrich the tax profession.”

— Donald E. Carson, CPA, CA, on behalf of the MNP LLP Tax Executive Committee

Judith Marriott, FCPA, FCA

Judith is a highly respected educator at North Island College (NIC) in the Comox Valley, where she educates and inspires the next generation of CPAs. As chair of NIC's Department of Business Administration, she facilitates the delivery of responsive, diverse, and high-quality programs.

An enthusiastic contributor to the development of CPAs for over 30 years, Judith created many of the prerequisite courses required for NIC students to enter her legacy body's professional practice program in the early 1990s. As an educator, she always endeavours to instil a sense of professionalism in her students, and she goes above and beyond by acting as a conduit to employment opportunities with local CPA firms.

In addition to educating future CPAs, Judith gives back to the profession by volunteering with CPABC. Passionate about giving back to the greater community as well, she currently serves as treasurer for the Comox Valley Community Foundation, the Comox Valley Community Justice Centre, and the Filberg Heritage Lodge & Park Association. Judith is also the current secretary for Rotary District 5020 and a past president of the Rotary Club of Courtenay.



★ “Judith is a role model and an inspiration to all of us. She embodies the qualities of a true leader and educator, and her impact on our institution, our students, and our community is immeasurable.”

— Alix Carrel, PhD, Language Instructor, North Island College

Fellowship



Scott Munro, FCPA, FCA

Since 2021, Scott has served as deputy CEO of the First Nations Financial Management Board (FMB), headquartered on Squamish Nation land (Xwemelch'stn) in West Vancouver, where he advances the causes of self-determination and economic reconciliation. He is Kaska Dena from the Yukon.

Scott advances the cause of First Nations economic development and self-determination by leading the standard-setting and certification activity that has allowed hundreds of First Nations to borrow much-needed capital (approximately \$2 billion). Through regular speaking engagements, he also helps CPAs and other business leaders understand how they can advance reconciliation by responding to the Truth and Reconciliation Commission's Calls to Action.

Passionate about increasing Indigenous representation in the accounting profession, Scott played a pivotal role in the collaborative process that saw the FMB become the first BC Indigenous organization to deliver the CPA pre-approved program in 2023. This same cause inspired his involvement with the Public Sector Accounting Board, for which he's currently completing his second term as vice-chair.

Also eager to make the profession more sustainable, Scott serves on CPA Canada's Sustainability Advisory Committee. Through this role and his work at the FMB, Scott champions the integration of Indigenous considerations into international sustainability standard-setting.



"Scott's significant contributions to the accounting profession and advocacy for inclusion of Indigenous issues in standard-setting speak to his support for economic reconciliation for First Nations in the Canadian economy."

— Marlene Gaudry, CPA, CA, Chief Operating Officer, First Nations Tax Commission



Beverley (Bev) Pao, FCPA, FCA

Bev is a vice-chair of Deloitte Canada, based in Vancouver, where she is known for her inspiring leadership and innovation mindset. Passionate about preparing Canadian businesses for the fast-changing global economy, she has led large-scale technology and business transformations that have enhanced both the client and talent experience. In addition to serving clients, Bev currently drives impact through her service on the board of directors of Deloitte Canada and Chile.

Bev has long been dedicated to advancing equity and empowering and elevating the next generation, the careers of CPAs, and business leaders of diverse backgrounds. She continues to demonstrate an unwavering commitment to creating a culture of belonging through her leadership as co-chair of the board's Diversity, Equity, Accessibility, and Inclusion Committee.

Equally devoted to making a meaningful impact in the community, Bev has led major initiatives as a board director of the Vancouver Chinatown Foundation. This includes chairing the foundation's Economic Revitalization Committee and providing oversight for the multimillion-dollar government funding received from all levels of government. She also serves on the board of the Vancouver Symphony Orchestra.



"Bev has been an exemplary contributor to our community by inspiring so many with her leadership. She commits so much of her personal time and energy to our shared vision of a prosperous, vibrant, and inclusive Chinatown, where people want to live, work, and visit."

— Carol Lee, Chair, Vancouver Chinatown Foundation

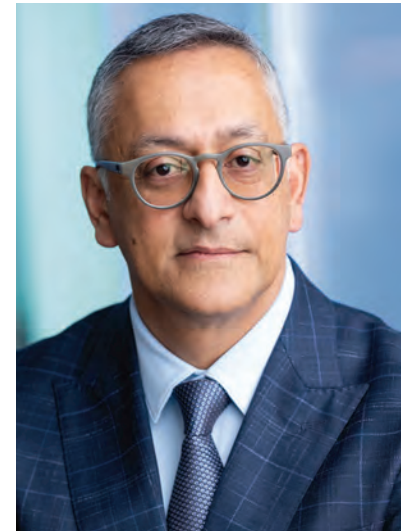
Jervis Rodrigues, FCPA, FCA

Renowned for his acumen in governance, Jervis is a partner with BDO Canada in Vancouver and senior vice-president of its business restructuring & turnaround services practice, guiding executive teams to achieve their strategic goals.

Jervis works tirelessly to build trust in both public and private operations. For over eight years, he has served as a monitor with the Competition Bureau, examining and resolving cases regarding monopolistic practices and predatory pricing. He has also worked with the Ministry of Housing/BC Housing to improve internal controls, processes, and policies.

Before joining BDO in 2015, Jervis was the chief financial officer of BCLC, where he increased transparency through his leadership of enterprise transformation and risk management initiatives. Earlier achievements include serving as the western Canadian leader for Deloitte’s restructuring group, which he built from scratch into a 70-person team.

Jervis’s expertise has garnered him numerous speaking engagements and writing assignments through which he continues to enhance the knowledge of CPAs and other professionals. As a qualified expert in forensic and insolvency matters, he’s also raising public awareness of the diverse roles CPAs can fulfil.



★ “With Jervis’s thoughtful approach to files, steady hand, and ability to consider matters from all perspectives, we have managed to drive matters to successful resolutions that might have seemed impossible at the outset.”

— Kibben Jackson, Personal Law Corporation, Fasken

Kristine Simpson, FCPA, FCA

Kristine is a partner with BDO Canada and the BC industry leader of the firm’s not-for-profit and education practice, which has grown from one to five partners during her tenure.

A sought-after expert known for her exceptional dedication to quality, service, and helping others, Kristine delivers transformational advice to a variety of organizations across the province. The profound impact of her work is most evident in the non-profit housing sector, where her recommendations for financial transparency, oversight, and reporting practices have resulted in substantial changes.

Also known for her commitment to diversity, equity, and inclusion, Kristine contributed to the formation of BDO’s National Diversity, Equity & Inclusion Advisory Council and continues to support and mentor the career advancement of female CPAs.

In the community, she has volunteered extensively within the Chamber of Commerce network, including serving as a board director and chair of BC Chamber of Commerce. In the latter role, Kristine spearheaded a strategic plan that rebranded the organization, modernized its service delivery, and recruited a diverse membership, while also maintaining key services to small businesses during the height of the COVID-19 pandemic.



★ “Kristine’s unique background as a CPA professional combined with her experience in the charitable and housing sectors is a magical hat-trick that we at Lookout—and the non-profit sector in general—benefit from greatly. She uses her accounting and auditing background to help us get on the right path and stay there.”

— Shayne Williams, CEO, Lookout Housing and Health Society

Fellowship



Duncan Sinclair, FCPA, FCA

In his 35-year career with Deloitte, Duncan has been integral to the firm’s thought leadership and public policy positions while also demonstrating exemplary leadership on a global scale.

In addition to being the elected chair of Deloitte Canada and Chile—having played a key role in the partnership’s formation—he currently chairs the firm’s Global Risk Committee and represents Canada on the global board. He is also the founding director of the firm’s Future of Canada Centre.

Outside of Deloitte, Duncan has shared his global perspective as an advisory board member for Stanford University’s Global Projects Center and as host of the *Courage Incorporated* podcast, where he asks business leaders and policy experts to reflect on Canada’s future.

Just as he has strengthened the CPA profession through his work with more than 23 Canadian and international regulatory bodies, Duncan has strengthened the community through his extensive volunteer service with organizations such as the Princess Margaret Cancer Foundation, which raises funds for cancer research and treatment. His many contributions as chair of the foundation’s Governance Committee include leading the implementation of a comprehensive digital onboarding program for new directors and completely reimagining the governance structure.



“Duncan’s impact throughout corporate Canada and globally is tremendous and multi-dimensional, spanning almost every major industry. Additionally, he has made significant contributions to the charitable sector and to the Canadian health-care system, including through his incredible leadership and impact in raising money for life-saving cancer research.”

— Dr. Miyo Yamashita, President and CEO, The Princess Margaret Cancer Foundation



Greg Smith, FCPA, FCA

Greg is the president and CEO of Equinox Gold Corp in Vancouver. Under his leadership over the past six years, Equinox has grown into a multibillion-dollar gold mining giant that employs more than 7,000 people at eight mines across four countries.

Greg’s 20+-year career in mining began at KPMG and includes C-suite roles at Minefinders Corporation, Esperanza Resources, and Equinox Gold. Thus far, he has raised well over \$1 billion in debt and equity financing to develop mines across the Americas and has closed over \$3 billion in mergers and acquisitions. He is also a founding executive and the current chair of Sandbox Royalties, a diversified metals royalty company.

For his early successes, Greg received an Early Achievement Award from his legacy body and accolades from *Business in Vancouver* (Forty Under 40) and the University of Victoria’s Gustavson School of Business (25 Alumni to Watch).

Today, Greg supports the next generation as a co-founder of Young Mining Professionals, which provides thought leadership, networking, and career and investment opportunities to young professionals in the industry; since its founding in 2007, the organization has expanded globally, with more than 10,000 members in 13 chapters across eight countries.



“Greg is a mentor and advocate for women in the mining industry. He has gone above and beyond to support myself and others with advice, networking opportunities, career advancement, and references.”

— Kylie Dickson, CPA, CA, Corporate Director

Trisha Tannis, FCPA, FCGA, FCA (BB)

Trisha provides steadfast leadership as managing director at Unicomer (Barbados) Ltd., a multinational retailing and consumer finance group in Barbados. Trisha’s strategic mindset and financial acumen have propelled the group to consistent sales growth—even through a deep recession—while at the same time reducing expenses by introducing product innovations and brand segmentation.

Prior to taking on her role as managing director, Trisha served in a series of progressive finance roles at Unicomer. As finance director (2002-2010), she contributed significantly to sustainable growth by ensuring elevated standards of governance, compliance, and risk management. She also led strategic initiatives that drove profitability, including the consolidation of underperforming locations and the improvement of cash flow to support finance portfolio expansion.

Trisha is a sought-after voice within the Barbadian business community. As chair of the Barbados Private Sector Association, she has advised the prime minister and guided the country’s response to recent global supply challenges, helping it avoid shortages of food and commodities. And as president of the Barbados Chamber of Commerce & Industry, Trisha led negotiations with the government on a set of protocols for the successful and safe reopening of the island economy.



★ “Trisha’s tenure as president of the Barbados Chamber of Commerce and Industry was a particularly challenging time as Barbados grappled with COVID-19. She provided stellar leadership—showing grit, determination, tenacity, and focus to assist Barbados through a time of crisis.”

— Joan E. Brathwaite,* Vice-President, Finance, Barbados Chamber of Commerce & Industry Inc.
(*Joan is an FCCA (UK) and FCA (BB))

Valerie Warren, FCPA, FCA

Valerie is a highly respected accounting instructor at Kwantlen Polytechnic University’s (KPU) Melville School of Business in Vancouver. She started teaching at KPU in 2005, and her insights, dedication, and ability to navigate complex challenges—particularly as associate dean (pro tem) and accounting faculty chair—have proven invaluable to the university’s advancement.

As chair (2014-2019), Valerie made significant improvements to the Bachelor of Business Administration in Accounting program and greatly increased the accessibility and quality of accounting education for future CPAs. In addition to establishing and supporting the implementation of a new admissions framework, she co-ordinated the mapping of the entire program to the CPA Competency Map in 2016-2017, demonstrating that KPU’s accounting graduates had the knowledge needed to enter the CPA Professional Education Program.

Valerie also shares her extensive knowledge through her writings and professional service. She has authored numerous accounting textbooks, has served as a contract practice review officer with CPABC for almost 18 years, and is a board director with the Canadian Academic Accounting Association (CAAA). Notably, under her leadership as chair of the CAAA’s Membership Committee, association membership has grown to the highest level in its history—up 25% since 2021.



★ “I have never met anyone at our institution who is more dedicated to students. Valerie ensures her own students have the support and guidance they need to succeed and also relentlessly advocates for students in other areas.”

— Lindsay Clayton, Chair, Accounting, KPU

Let's Chat about AI

Part III: Questions, Concerns, and Myths

By Mitchal Derksen, CPA, CA



ojobonitoo/Stock/Getty Images

Welcome to the final instalment of our three-part “Let’s Chat About AI” series authored by Mitchal Derksen, CPA, CA, founder and CEO of Numu Technologies in Vernon. Mitchal is a software developer who works with AI every day. In Part I (January/February 2024 issue), he offered practical advice on getting started with AI; in Part II (March/April 2024 issue), he explored the risks and ethical considerations CPAs need to address when using this transformative technology; and in Part III, he addresses some of the uncertainties around AI.

Thank you for joining me in the final part of this series on AI and its impact on the CPA profession. My hope is that this series will serve as a springboard to a broader, and evolving, conversation for us as CPAs. As professionals with considerable influence in the business landscape, we have the opportunity to contribute meaningfully to discussions about AI, and this includes participating in thought-leadership forums and advising government on policy.

While the topic of AI is expansive and there is much more to say on the matter, I wanted to finish off this series by addressing some questions, concerns, and myths.

Will AI tools change the skill set of CPAs in the future?

The short answer is yes. AI tools are set to alter the skill set required of CPAs, leaning more heavily into technological proficiency and strategic thinking. I believe CPAs will need to become adept at using AI to enhance data analysis and decision-making processes. In short, I think CPAs will need to step outside traditional accountancy roles to become tech-savvy advisors.

What can CPAs do to stay relevant as AI reshapes the world of business?

To adapt to the new business landscape, CPAs will need to gain a solid understanding of data analytics, learn basic programming knowledge—especially in languages like Python—and pursue continuous education in AI applications. CPAs should focus on developing these skills to complement the efficiency gains from automation, ensuring that we can deliver higher-value insights and maintain our pivotal role in the business landscape.

Will finance jobs be paid less due to AI?

The financial terrain is undeniably transforming under AI’s influence, but it’s not all about slashed paycheques. In fact, AI could potentially lead to more rewarding roles, both intellectually and financially, for those who are willing to adapt and upskill.

As AI automates routine tasks, the demand for strategic financial expertise will rise. This could well enhance the value and compensation for finance professionals who pivot to roles that leverage these higher-level skills. Ultimately, for the savvy professional, AI is less of a threat and more of an invitation to evolve.



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Will CPAs lose their jobs?

The short answer is no, though some roles associated with work that CPAs do today will likely become obsolete. Functions that are more focused on data-entry and repetitive data management (e.g., populating tax returns) are the ones most likely to be replaced by AI in the near term. But this is not a bad thing. By automating menial tasks, AI will free us up to take on more meaningful and challenging work.

Ultimately, it's adaptability that will keep us ahead in the AI era. Proactive and flexible CPAs who learn how to use AI effectively, augment their skill sets with data analytics and technological expertise, and pivot towards more strategic functions within finance should be able to secure a vital place in the future job market.

What would you say to someone who expects to retire before AI takes hold?

I've always been a firm believer in being a lifelong learner, which means retirement is not the end of the learning journey—particularly for the many retired CPAs who continue to offer leadership and insight through board service. All organizations, including non-profits, will face the challenge of implementing AI responsibly, and it behooves us as respected business experts to continue learning so that we can provide valuable guidance along the way.

For those currently eyeing retirement, learning about AI isn't about keeping a job—it's about enriching your professional narrative. It's a chance to mentor younger colleagues through this huge paradigm shift, offering wisdom on how to blend AI with human insight. This will not only add value to your current role but will also leave a lasting impact.

Will many small businesses close because they can't keep up with the demands of AI?

To the contrary, AI could actually help some small businesses grow more. A brief personal story: After working with some of Canada's largest organizations, I started Numu Technologies in 2018 with the goal of making the AI, business intelligence, and technology used by large organizations accessible to small businesses—essentially levelling the playing field. Now, in 2024, we aren't the only ones doing this, and AI is offering smaller enterprises tools that were once only accessible to large corporations. These tools can streamline operations, uncover insights in data, and open up new avenues for customer engagement and service delivery.

Certainly, there is a learning curve, and not all small business owners may initially feel equipped to handle it. However, AI's increasing accessibility means that it's more about the willingness to adapt than the capacity to do so. Instead of leading to widespread closures, AI could empower small businesses to compete more effectively, grow their customer base, and enhance their products and services. It's about taking the first steps, leveraging the wealth of available learning resources, and sometimes seeking external support to integrate AI in a way that aligns with their unique business goals.

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What are some common misconceptions about AI?

Discussions about AI in the accounting industry often paint a picture that's either too bleak or, conversely, overly optimistic.

Let's debunk a few myths:

- **Myth #1: AI will replace accountants:** As mentioned earlier, it's a myth that AI is set to completely replace human accountants. Instead, AI will continue to be used to automate routine tasks, freeing up professionals to focus on more strategic, advisory roles.
- **Myth #2: AI is only for “big players”:** Many believe AI solutions are solely the domain of large organizations. However, AI technology is becoming increasingly accessible and affordable for businesses of all sizes, including small and mid-sized practices.
- **Myth #3: AI can solve problems on its own:** There's a common misconception that AI tools can independently tackle and solve complex accounting problems. While AI can significantly enhance data analysis and decision-making, human oversight is required for interpretation and ethical considerations.
- **Myth #4: AI implementation is overwhelmingly complex:** Integrating AI into accounting practices may seem a daunting or even insurmountable challenge. But while AI tools do require some upfront learning and adaptation, many are specifically designed with user-friendly interfaces to make them accessible even to non-technical users.

How can we regulate a technology that seems to have limitless possibilities?

Although regulating a technology as expansive and rapidly evolving as AI is indeed challenging, it is far from impossible. It will require a concerted effort and a dynamic approach—one that balances innovation with ethical considerations, privacy concerns, and societal impact.

Here's how I think we can navigate this:

1. **Collaborative frameworks:** Governments, industry leaders, and academic experts need to work together to create flexible, forward-looking regulations that can adapt to technological advancements while safeguarding the public interest.
2. **Ethical guidelines and standards:** Establishing clear ethical guidelines and standards for AI development and usage is crucial. To ensure that AI systems are designed and deployed responsibly, these guidelines and standards should prioritize transparency, accountability, and fairness.
3. **Continuous monitoring and evaluation:** Given AI's rapid evolution, regulatory bodies will have to continuously monitor AI developments and assess the effectiveness of existing regulations, making iterative adjustments as necessary.
4. **Public engagement:** Including public input in the regulatory process will help ensure that AI technologies align with societal values and needs, thereby fostering broader acceptance and responsible usage.
5. **International cooperation:** AI's impact crosses borders, making international co-operation essential. Countries should work together to harmonize regulations, preventing a patchwork of standards that could hinder global innovation.

As individuals who are trained to understand and interpret regulatory frameworks and equipped with a strong ethical background, CPAs have a unique role in the business environment—particularly as we also work in day-to-day business roles across all industries. Accordingly, we are well-positioned to contribute best-practice guidance to government as it sets policies and best practices regarding AI.

As a starting point, I would like to see the formation of an AI strategy forum under CPABC, comprised of CPAs from all different industries and roles—including AI professionals—that can help shape these best practices and advise government on policy considerations.

Key resources for CPAs

I know there are a lot of questions about AI—including how to get started with coding and other AI tools. Accordingly, my team at Numu Technologies has curated a small, free learning library for CPAs who are interested in learning more about AI and software development, which we invite you to explore at numutech.com/infocus.

CPABC is also continuing to create new professional development courses about AI, including “How to Use AI: Practical Uses of AI for CPAs,” a breakout session that I'll be hosting at the virtual Business & Leadership Insights PD Nexus Day on July 25. You'll find more information at pd.bccpa.ca/conferences/pd-nexus-days. ■

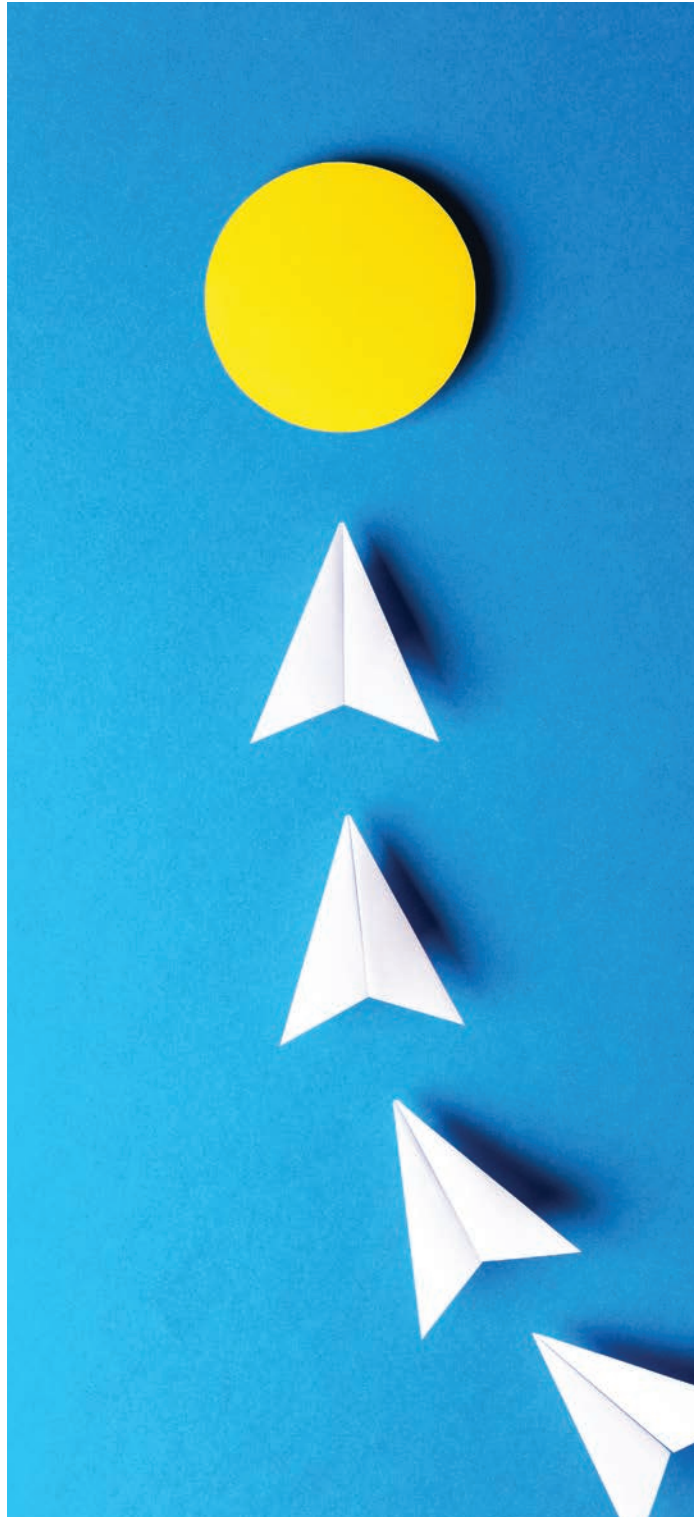
Mitchal Derksen is the founder and CEO of Numu Technologies in Vernon. He and his team of CPAs focus on researching and developing accounting AI responsibly.



Be sure to check out Mitchal's interview in the *Coffee Chats with CPABC* podcast series. You'll find the episode (“Let's Chat about AI: A Practical Discussion for CPAs”) at cpabc.libsyn.com.

CPABC's Indigenous Engagement Strategy: Progress Update

By Lori Mathison, FCPA, FCGA, LLB



zakakor/Stock/Getty Images

Over the course of the 2023-2024 fiscal year, CPABC remained committed to making the accounting profession more attractive and accessible to Indigenous individuals, and to supporting Indigenous candidates, students, and prospects who enter the profession. We also maintained our close working relationships with Indigenous organizations such as the Aboriginal Financial Officers Association of BC (AFOA BC) and the First Nations Financial Management Board (FNFMB), and focused on furthering our engagement with Indigenous communities. This meant listening and conducting respectful dialogue to better understand community needs and how the CPA profession can be a trusted partner.

Here's an overview of some of the key activities and initiatives we undertook in 2023-2024.

Increasing awareness of Indigenous matters

Since our last update in the March/April 2023 issue of *CPABC in Focus* (pages 24-26), we've started a new forum for Indigenous CPABC members. The forum has met twice, and a third meeting will be held later in 2024.

At the inaugural meeting, which was open to Indigenous members only, we discussed CPABC's Indigenous Engagement Strategy and sought participants' interest in and hopes for the forum. At the second meeting, which was open to Indigenous CPAs and candidates, Indigenous allies, and CPABC partners, participants had the chance to learn about the RoadMap Project—"a practical and implementable pathway to Indigenous economic reconciliation"¹—from Harold Calla, FCPA, FCGA, CAFM, the executive chair of the FNFMB, and Scott Munro, FCPA, FCA, CAFM, the FNFMB's deputy chief executive officer. (Scott is profiled in our Member Recognition cover story on page 26.)

To bring additional awareness about Indigenous history to our members, we will soon be adding the online course "4 Seasons of Reconciliation" to CPABC's Professional Development Program. This three-hour course provides basic foundational knowledge on truth and reconciliation and was developed by Reconciliation Education, a Regina-based organization that provides online learning designed to advance reconciliation between Indigenous and non-Indigenous peoples. Offered in partnership with Red River College Polytechnic in Winnipeg and First Nations University of Canada in Regina, the course is available to CPABC and other interested provincial bodies thanks to an agreement negotiated by CPA Manitoba.

The "4 Seasons of Reconciliation" course will be available on demand through CPABC's PD program and will be eligible for three hours of ethics CPD.

¹ FNFMB, "Welcome to the RoadMap Project," fnfmb.com.

Recruiting Indigenous CPA students

CPABC has dedicated Indigenous staff who are focused on recruiting Indigenous students into the CPA program. Over the past year, they conducted outreach and hosted Indigenous webinars and events in person and online.

In addition, the CPA Western School of Business, CPA Canada, and the Aboriginal Financial Officers Association of Alberta collaborated with Indigenous subject matter experts to create courses for the CPA certification program that are tailored to Indigenous learners. By addressing challenges unique to Indigenous learners, these courses are weaving Indigenous culture and context into the certification program. Current course offerings include Introductory Financial Accounting, Introductory Management Accounting, CPA PEP Core 1 Module, and CPA PEP Core 2 Module.

Engaging youth and post-secondary students

In addition to offering various programs to help young Indigenous learners identify and reach their career goals, CPABC provides opportunities to access financial support. In 2023-2024, we added to these opportunities by partnering with TELUS to launch the TELUS Award for Indigenous Post-Secondary Success scholarship.

Over the past year, CPABC also actively engaged and supported Indigenous post-secondary students by sponsoring Indigenous student clubs and attending and sponsoring various on-campus events, including lunch & learn sessions and Indigenous student feasts.

Working with Indigenous communities

We were also active in the community, with CPABC staff participating in the following career fairs and events:

- Cando Links to Learning Conference, a partnership between Cando, the National Aboriginal Lands Managers Association, the First Nations Land Management Resource Centre, Indigenous Services Canada, and Procurement Assistance Canada;
- Gathering Our Voices conference, hosted by the BC Association of Aboriginal Friendship Centres (see right);
- Indigenous Business Association Conference at UBC;
- Indigenous Pathways in Business events at Camosun College and Thompson Rivers University;
- Langara College Casual Lunch & Learn with Indigenous Student Services;
- Seabird Island Career Fair, hosted by the Seabird Island Band;
- Squamish Nation Youth Career Conference, hosted by the Squamish Nation; and
- Stó:lō Aboriginal Skills & Employment Training Society Career Fair.

CPABC also served as a lead sponsor of the Tools & Financing for Aboriginal Business Networking Event, put on by the Canadian Council for Aboriginal Business. This event helps build bridges between Indigenous and non-Indigenous peoples, businesses, and communities, and provides practical tools, training, and networks to help Indigenous businesses grow.

Over the past year, we also focused on ensuring that Indigenous organizations are aware of the opportunity to post governance positions on the CPABC career site.

Encouraging financial wellness

CPABC continued to work with Indigenous partners and organizations to provide Indigenous youth, entrepreneurs, and business owners with free and unbiased financial literacy sessions in-person or online—this included having CPA volunteers deliver financial literacy programming at an on-reserve elementary school. As a result of our various community engagement efforts, we have seen an uptick in requests for financial literacy sessions from Indigenous communities across BC.

Most recently, we worked with our CPA volunteers to bring five financial literacy sessions to the Gathering Our Voices conference for Indigenous youth. In creating these sessions, listed below, we incorporated participants' feedback from our sessions in 2022-2023:

1. Money Basics for Indigenous Youth;
2. Navigating Your First Tax Return: A Guide for Indigenous Youth;
3. Cash Flow Champions: Empowering Indigenous Youth with Budgeting;
4. Navigating the Financial World Through a Fun Game of Bingo; and
5. Pathways to Prosperity: Navigating Financial Futures – Careers Panel.

At the Gathering Our Voices conference, CPABC also shared an exhibitor booth with AFOA BC.

As we continue to expand our financial literacy outreach to Indigenous communities, we are looking for more Indigenous volunteers to share their knowledge. And to support our non-Indigenous financial literacy volunteers, we are currently working with an Indigenous CPA to develop a series of train-the-trainer videos; the goal of this series is to further educate our volunteers on how to engage with Indigenous communities in a respectful manner.

We provide training to all volunteers. If you'd like to volunteer in support of CPABC's Indigenous Engagement Strategy, we would be very pleased to hear from you. Please contact indigenous@bccpa.ca or finlit@bccpa.ca for more details. ■

Lori Mathison is the president & CEO of CPABC.

Insights on Mental Wellness at Work

By Kerri Brkich



HA KINMHAN/ISTOCK/Getty Images

When it was created in 2019, CPABC's Mental Wellness Steering Committee was given a twofold mandate: 1) to research how mental wellness and mental health issues were being addressed in other professions and in general society; and 2) to recommend what more, if anything, CPABC could do to support members and better protect the public. The committee launched CPABC's first *Mental Wellness Survey* in September 2021 and issued a follow-up survey in September 2022. Highlights from both surveys were shared in *CPABC in Focus* in May/June 2022 and May/June 2023, respectively.

To build on the insights gained from its 2021 and 2022 mental wellness surveys, CPABC's Mental Wellness Steering Committee invited three cohorts to participate anonymously in online discussions in 2023: candidates registered in the CPA Professional Education Program (CPA PEP), members in public practice, and members in industry. Participants were recruited from the 2022 survey respondents who'd expressed interest in taking part in additional research, and each discussion group met virtually over a two-day period (September 26-27).

The goal with this research was to better understand the current state of mental wellness as it relates to work among different subgroups, what helps or hinders participants' mental wellness, and whether participants have access to the supports they currently need.

What our members, candidates, and students said about mental wellness in the workplace

On positive and negative factors

Participants' self-assessments of their mental wellness ranged considerably—from very positive to struggling. Still, there was a common thread among all three discussion groups, with individuals from each cohort describing a past or current struggle with mental wellness, demonstrating the universality of this issue.

When discussing the factors that positively or negatively affect their mental health, some participants said work is a positive factor, noting the benefits of feeling good about a job well done, making progress in their career, helping a client, and having a positive work environment. In general, however, work and school were *not* described as positive influences, and many participants said they rely on factors outside of work or school to maintain their mental wellness.

At the same time, many participants said mental health challenges don't necessarily affect their work—or at least they try to keep them from doing so. However, they also acknowledged that having a positive mental state helps them focus at work, stay organized, and keep on top of deadlines, and agreed that being in a poor state of mental health has the potential to hinder work or school performance.

This feedback suggests that any steps taken to optimize the work environment to support workers' mental health will—by extension—help minimize work/school-related problems as well.

Time and physical health constraints were also identified as barriers to mental wellness. Specifically, many participants said that while they know exercise, nutrition, and work/life balance positively affect their mental health, barriers such as a lack of time and poor health can make it challenging to work out, eat right, and juggle their professional and personal lives. Clearly, any support that can help them overcome these obstacles would be welcome.

On resources and access

When asked how they've addressed challenges related to mental health, most participants said talking to trusted and close family members and friends provided the greatest source of comfort, and many said they turn to physical exercise and leisure activities. These participants tend to rely on self-supplied and informal solutions, which they consider more accessible, rather than turning to more structured or work-sponsored resources, such as counselling.

When asked about more formal support services, participants' answers tended to reflect the extent to which they'd actually reached out for these services in the past. Many said that while they know these kinds of services are available, they aren't sure where to find them. Others said barriers like cost and waitlists make it challenging to access structured or work-sponsored services.



Do you need financial assistance?

Support is available

CPABC's Benevolent Fund provides short-term financial assistance to members in need.

Visit bccpa.ca/benefits for details.



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Participants who said they *had* used more formal mental wellness supports generally talked about seeing professional counsellors, therapists, and/or psychiatrists. Interestingly, even many of these participants had sourced professional services on their own, rather than seeking referrals through a resource offered by their employer or CPABC.

When asked about their comfort level in discussing mental health issues with an employer, some participants said they'd feel "fine" speaking up, while others expressed hesitancy—either because they worried about how they would be perceived or because they were skeptical about receiving any support.

It is likely fair to say that there are still some significant barriers for many employees when it comes to sharing mental health information with their employers (and even with their co-workers). This ongoing stigma (whether perceived or actual) reinforces the need for access to confidential and private external support services.

These kinds of external support services are also essential to sole practitioners, as self-employed participants in the public practice cohort identified the additional, and unique, challenge of literally having no one else to turn to at work for support (either formally or informally).

Popular webinar available online

A free and on-demand recording of "Overcoming Burnout" will be available online until October 2024. More than 800 members attended this live webinar in 2023, and it was ranked "above average" or "excellent" by more than 87% of survey respondents. Visit pd.bccpa.ca.

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On advice for employers

When asked to discuss how employers can better support mental wellness, participants were particularly engaged, appreciating and adding to each other's ideas. Here are some suggestions that emerged from these discussions:

Better management of workloads:

- Maintain full staff/don't expect teams to work short-handed;
- Be proactive during busy seasons/hire seasonally to lighten workloads; and
- Give candidates enrolled in CPA PEP a four-day work week while they're taking the course modules.

Better health benefits:

- Increase benefits for more counselling/provide access to regular counselling;
- Offer free counselling over Zoom;
- Subsidize gym memberships/reimburse costs for physical activities;
- Increase paramedical coverage (e.g., coverage for acupuncture, chiropractic care, massage therapy);
- Offer extended benefits for physical *and* mental well-being; and
- Provide access to employee assistance programs.

More workplace initiatives:

- Raise awareness of and advertise the supports available to bolster employees' mental wellness;
- Shift the culture by increasing the discussion of mental wellness at work/create an open-door policy/provide positive examples from leadership;
- Focus on team-building and establishing good work relationships;
- Have regular one-on-one check-ins with employees; and
- Allow for more mental health days.

Other initiatives:

- Send out an anonymous internal questionnaire on employee mental health;
- Enable employees to fully disconnect from work rather than expecting them to work after hours; and
- Provide more education about when employees should start seeking help.

Let's keep the discussion going

The ongoing research conducted by the Mental Wellness Steering Committee aligns with CPABC's efforts to support the evolving mental wellness needs of members, candidates, and students. If you'd like to share some thoughts on this topic, email us at infocusmag@bccpa.ca. And be sure to check out our infographic on pages 42-43, as it highlights recent research into mental health in the Canadian workplace. ■

Kerri Brkich is the vice-president of external affairs and communications for CPABC.



PeopleImages/Stock/Getty Images

TELUS Health One MAP offers free and confidential mental wellness resources

All members, candidates, and students (and their immediate family members) can access free and confidential mental wellness resources through CPABC's TELUS Health One Member Assistance Program (MAP). MAP resources include:

- Short-term, solutions-focused counselling and consulting services, offered outside of the workplace;
- Personalized recommendations, such as assessments, digital clinical programs, and advice to help you reach your health and fitness goals;
- Online audio, video, and written content on various topics from experts; and
- Tool kits related to family life, health and fitness, money, and more.

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- Call TELUS Health at 1-844-880-9142.

Pulse Check: Mental Health in the Canadian Workplace

Since its launch in April 2020, the *TELUS Mental Health Index* has measured the mental health of workers in Canada on a monthly basis, producing reports that provide an overall Mental Health Index and a “Spotlight” section focused on current issues. The January 2024 report for Canada (the latest one available at the time of this writing), shines the spotlight on workplace culture, and the results of an online survey of 3,000 workers demonstrate the correlation between positive work environments, productivity, and mental health. In recognition of National Mental Health Week (May 6-12, 2024), here are some highlights from the report.

RESPECT AND RECOGNITION



69% agreed that they feel valued and respected by colleagues

50% agreed that rewards and recognition are fair and unbiased in their company



10% disagreed; they were more than twice as likely to say their mental health negatively affects their work productivity

25% disagreed

MENTAL HEALTH BENEFITS



55% rated the mental health benefits and services provided by their employer as excellent



17% rated the mental health benefits and services provided by their employer as poor; another **21%** said they don't know if their employer provides such benefits and services or said their employer does not provide them

ATTITUDES TOWARD MENTAL HEALTH



47% rated their company's culture around mental health positively



15% rated their company's culture around mental health negatively

SUPPORT IN THE WORKPLACE



62% said their workplace is generally supportive



21% said their workplace is not generally supportive; they were more than 2x as likely to say their mental health negatively affects their work productivity

According to the January 2024 *TELUS Mental Health Index* report:

- **33%** of Canadian workers have a high mental health risk;
- **45%** have a moderate mental health risk; and
- **22%** have a low mental health risk.

Workers under 40 were **60%** more likely than workers over 50 to describe their workplace as unsupportive.

Parents were **50%** more likely than non-parents to describe their workplace as unsupportive.

PSYCHOLOGICAL SAFETY



63% agreed that their workplace is committed to ensuring employees can voice concerns without fear of punishment or humiliation

64% agreed that harassment, bullying, unhealthy conflict, and other harmful behaviours are resolved quickly and fairly in their workplace



15% disagreed; they were nearly twice as likely to say their mental health negatively affects their work productivity

13% disagreed; they were nearly twice as likely to say their mental health negatively affects their work productivity

Women were **50%** more likely to report that harmful behaviours are not resolved quickly and fairly in their workplace.

JOB AUTONOMY AND EXPECTATIONS



72% agreed that they are satisfied with the amount of control they have over their work

56% said the expectations of their job are realistic



13% disagreed

34% said expectations are either “a bit too demanding” or “too demanding”

84% of those who described expectations as “a bit too demanding” or “too demanding” said their mental health is negatively affecting their productivity.

TRUSTED RELATIONSHIPS



61% have trusted personal relationships

55% have trusted workplace relationships

55% have someone they “trust enough to be their true self with”



24% say they lack trusted personal relationships; they were nearly 4x more likely to report feeling isolated

27% say they lack trusted workplace relationships; they were 3x more likely to report feeling isolated

26% say they don’t trust anyone enough to be their true selves with; they were 3x more likely to report feeling isolated

Workers under 40 were more than **40%** more likely than workers over 50 to say they lack trusted workplace relationships, nearly twice as likely to say they lack trusted personal relationships, and **80%** more likely to say they do not trust anyone enough to be their true selves with.

Parents were **40%** more likely than non-parents to report not having anyone they trust enough to be their true selves with.

For more information on the *TELUS Mental Health Index*, visit go.telushealth.com/telus-mental-health-index.



Farzin Remtulla is an associate with ZLC Financial in Vancouver, where he specializes in providing customized life insurance and investment solutions to his clients.

Do Your Clients—and Their Children—Have an Estate Liquidity Plan?

By Farzin Remtulla, CPA, CA, CFP, TEP



SvetlanaZ/Stock/Getty Images

Earlier this year, the Canadian tax planning community received some welcome news from the CRA via two of its technical interpretations.¹ Although the newly revised general anti-avoidance rule (GAAR) introduces the concept that transactions significantly lacking in economic substance are likely to result in a misuse or abuse of Canada’s *Income Tax Act*, the CRA will not be changing its position on post-mortem “pipeline planning,” provided this planning meets existing CRA administrative guidelines.

The preservation of post-mortem pipeline planning brought a sigh of relief to the tax community. Still, estate planning remains a complicated exercise, and tax planning alone is not the only factor to consider. Another stage of planning is often needed—one I like to refer to as *estate liquidity planning*.

¹ CRA document no. 2024-1008251I7, February 28, 2024, and CRA document no. 2023-0987941I7, February 29, 2024.

But first: What is post-mortem planning and why is it important?

Immediately before the time of death, Canadians are deemed to have disposed of and reacquired their assets at fair market value (FMV).² This includes a deemed disposition of corporate shareholdings, which can result in a hefty estate tax bill for business owners who have accumulated significant wealth in their corporations.

To add salt to the wound, there's a double taxation issue that can arise when:

1. The FMV of a company's shares is taxed on the death of a shareholder; and
2. The same corporate value is then subject to tax a second time on the eventual disposition of the underlying corporate assets and the extraction of the sales proceeds in the form of dividends.

Thankfully, there are two post-mortem tax-planning techniques that can be used to prevent this occurrence of double taxation, commonly referred to as "the 164(6) loss carryback plan" and "the pipeline plan." The former typically involves paying tax at personal dividend rates, and the latter involves paying tax at capital gains tax rates. Without going into the specifics of each, depending on a client's tax situation, one plan might be preferred over the other.

² Per subsection 70(5)(a) of the *Income Tax Act* (ITA).

³ Aliya Goldan, CPA, CA, "Corporate Attribution in the Context of an Estate Freeze: Watch Out for the Trap," *CPABC in Focus*, May/June 2021 (42-44).

Post-mortem planning with a cherry on top?

Regardless of the post-mortem strategy undertaken to avoid double taxation, there remains at least one layer of tax for which estate liquidity is required. A common tax strategy for reducing and deferring the amount of capital gains tax exposure when passing wealth from one generation to another is an estate freeze,³ followed by a sensible amount of planned share redemptions to reduce the amount of tax exposure (referred to as a wasting freeze). To the extent that exposure to capital gains tax remains after a wasting freeze, taxpayers will need a financial plan or strategy to ensure that they have the liquidity required to pay the tax bill.

This is where tax planning for estates stops short. Although a wasting freeze combined with either of the two post-mortem plans described earlier will successfully reduce exposure to capital gains tax and eliminate the occurrence of double taxation, these kinds of tax plans generally do *not* create the liquidity needed to cover the tax bill. This is where estate liquidity planning comes in.

In my 2020 tax article, "Life Insurance Financing and the Great Wealth Transfer,"⁴ I discussed how corporate-owned life insurance can complement an estate plan in a tax-efficient and cost-effective manner, and how it will provide an estate with instantaneous liquidity to fund its capital gains tax bill. In terms of the financial return, corporate-owned life insurance can also make for a lucrative financial investment as well, especially when taking into account the tax benefits of funding policy premiums with cheaper after-tax dollars and tax-sheltered returns within the policy.

Additionally, in certain situations, life insurance leverage can further enhance returns and provide a means for companies to retain cash flow for use in their business and investments.

Also of significance in a post-mortem context, corporate-owned life insurance creates an addition to the company's capital dividend account that will allow for the extraction of corporate surplus in the form of tax-free capital dividends, reduce overall tax exposure, and enhance net estate values—regardless of the post-mortem plan being contemplated. Combine the tax and financial benefits of corporate-owned life insurance with the liquidity created to cover the tax bill, and you have the cherry on top of your estate's tax plan.

⁴ *CPABC in Focus*, March/April 2020 (46-48).



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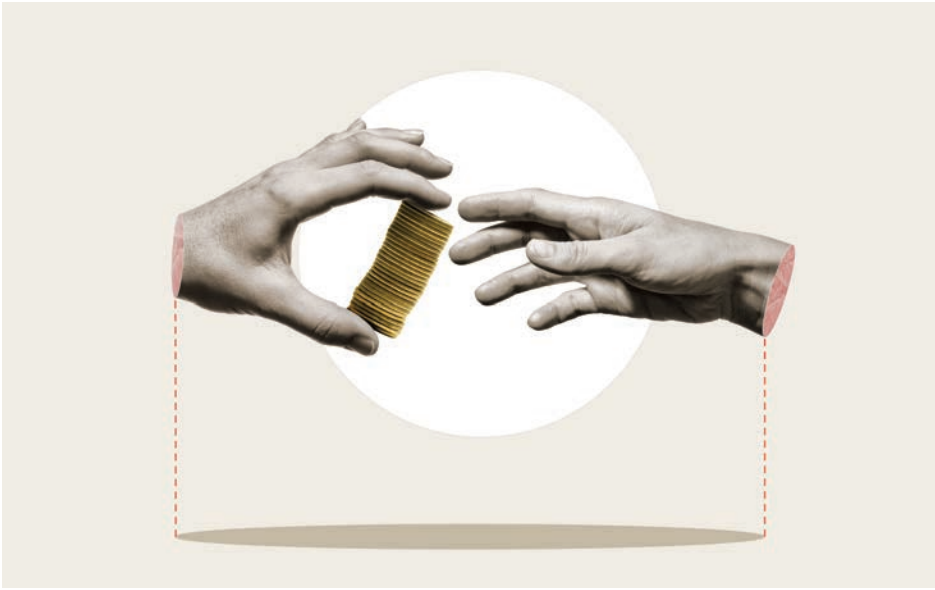
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Don't forget about the children

This issue is top of mind because, increasingly, we're seeing boomer parents leaving their millennial and zoomer children with a hefty tax bill. Typically, these boomer parents are doing an excellent job with their own personal tax and liquidity planning—undertaking estate freezes and creating a plan to ensure that there's a sufficient amount of liquidity in their estates to cover their future tax bill.



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The problem, however, is that all of this careful planning results in them transferring accrued gains to their millennial and zoomer children, and the ensuing capital gains tax bill is often significant—particularly given the rise in real estate values in British Columbia over the past decade.

For this reason, the inheritances being left to millennials and zoomers should be managed not only with tax and estate liquidity in mind, but also taking into account a number of other factors, including:

- Whether the children have proper wills;
- Whether the children have marital agreements in place that could exclude shares of the family corporation transferring to their partners;
 - If the answer is yes, they may need both an estate liquidity plan for their taxes *and* an estate liquidity plan to provide financial security to their dependants (their partners and children);
- Whether the children are interested in maintaining the family assets, continuing to run the business, and building on the legacy created by prior generations?
 - If the answer is yes, they will need to determine who will effectively manage and make the important decisions relating to the legacy assets;
- Whether any assets will be sold during the children's lifetimes, thereby accelerating the occurrence of tax (to their lifetime rather than on death); and
- Whether siblings who will share in an inheritance are on the same page when it comes to growing the family assets versus cashing out;
 - If the answer is no, they must consider the liquidity plan to buy out those who do not wish to participate in the future growth of the business.

Final thoughts

Given the complexity of estate planning, as illustrated here, it is best to take a multifaceted approach when creating an estate plan—one that incorporates the expertise of tax, financial, and legal professionals working together. ■



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PD EXPERTS

Are You Paying Attention to Your Team’s Mental Health?

By Tammy Robertson



Tammy Robertson has almost 30 years of experience as a professional speaker, author, and life leadership coach. She is the president of WorkHeart Consulting, a faculty member for both the Banff Centre and the University of Calgary, and the instructor of CPABC’s Resilient Leadership and Advanced Resilient Leadership certificate programs. Photo by David Watt.

UPCOMING COURSES WITH THE AUTHOR

For details on Tammy’s upcoming course dates in May and June, including “Beyond Burnout: Resilience, Grit, and a Fulfilling Life” for the Women in Leadership Certificate Program, visit pd.bccpa.ca.

How are your team members doing on a scale of one to 10? Have you asked them recently? Not long ago, it was considered intrusive—even irrelevant—to ask questions about mental wellness in the workplace. Compassion was seen as too “soft” for the real world of business, and we were told to “check our feelings at the door.”

If you’ve been paying attention, you know expectations today are completely different, particularly as the “Great Resignation” has morphed into the Great Retirement/Reflection/Awakening and, most recently, the Great Exhaustion. Fear and anxiety are natural responses in times of massive change, uncertainty, division, and disconnect, and how leaders address this reality will largely determine how their teams feel, how engaged they are, and how resilient and successful they can be.

Pay attention to the signs

If your photocopier started smoking and making weird noises, you would stop to investigate it. And yet when *people* signal in all kinds of ways that they are not okay, many leaders ignore the signs and press on—in the end, actually treating people worse than machines.

That needs to change, because here’s what research is telling us:

- Only 21% of Canadian employees are engaged. The remaining 79% are not engaged (“quiet quitting”) or are actively *disengaged* (“loud quitting”).¹
- 56% of Canadians are experiencing a lot of daily stress.²
- 78% of workers in Canada have a moderate to high mental health risk.³

There’s an inverse correlation between engagement and stress—the higher the former, the lower the latter. So how can leaders increase engagement? You need to pay attention to the signs and determine how to shift organizational culture to truly support the mental wellness of your team.

Five ways to support your team’s mental health:

1. Normalize the conversation

Are you more likely to acknowledge someone who has broken their leg than someone who is feeling anxious? Do you feel comfortable talking about health and safety policies but wince at the idea of asking people about their stress level? Do you offload mental and emotional health to “programs and policies” and bypass conversations that could bring these policies to life?

If so, it’s time to change your approach. Having policies, programs, and procedures around mental health is not enough. You can’t outsource care to another department—what makes a difference is showing up every day and demonstrating care in real time. And the more willing you are to talk about mental health, the more people will believe that you (and the organization) support their well-being.

¹ Gallup, *State of the Global Workplace: 2023 Report*, gallup.com.

² Ibid.

³ TELUS Mental Health Index, January 2024, go.telushealth.com. For more from the January 2024 report, see the infographic on pages 42-43.

2. Check in mindfully

We spend most of our waking lives at work, and it can feel incredibly lonely when others know nothing about us beyond our job title. Unfortunately, many leaders are in such a hurry to get things done that they don't make time for conversations that aren't task-oriented. And yet asking people how they are and taking a moment to acknowledge them is a simple sign of caring that builds trust and engagement.

Think about how you're checking in with people in your one-on-ones and in your team meetings. Do you offer only a quick hello before getting down to business? Or are you making time for more meaningful interactions?

3. Show compassion

In these tumultuous times, employees are in desperate need of empathy from their leaders, but many leaders are just too exhausted to care. Some are even experiencing "empathy fatigue"—the feeling of being depleted or numb as a result of caring *too much*.

Leaders need to strike a balance. Showing compassion doesn't mean taking on the problems of others and running yourself ragged in the process. It means holding space, listening, and acknowledging. Often, it is simply a matter of saying, "That sounds hard." You don't need to be a therapist to show compassion—a kind gesture of understanding is all that is needed.

And remember, if someone tells you they're struggling, the fact that they're verbalizing their struggle will not make the situation worse. The expression of an emotion is not the cause of an emotion; rather, it is the release of an emotion.

4. Prioritize psychological safety

The number one characteristic of a high-performing team is psychological safety, according to research done by Google.⁴ When this exists, people feel comfortable offering ideas and opinions even if these ideas and opinions are not fully formed, that they can make mistakes and learn from them, and that they can challenge their boss's opinions, ideas, and decisions. This freedom correlates to lower anxiety and a higher sense of significance, value, and confidence.



Tassil/Er/Getty Images

5. Be much more curious

The best leaders ask way more questions—big, open-ended questions that spark thinking.⁵ They also give people time to think before responding. Are you asking for this kind of input from your team?

People who believe their ideas matter at work report much higher levels of mental wellness.⁶ They are less likely to report burnout or develop physical illnesses, and they are more likely to demonstrate resilience in the face of change and uncertainty.

The call for more humane leadership

Shifting away from old, hardwired beliefs about leadership is a huge challenge, but today's leaders must adopt a more compassionate approach if they want to drive engagement and build resilience.⁷ Thankfully, more and more leaders are taking on this challenge, and they're building incredible cultures! ■

⁴ Gary Burnison, "7 Years Ago, Google Set Out to Find What Makes the 'Perfect' Team—and What They Found Shocked Other Researchers," February 28, 2019, [cnbc.com](https://www.cnbc.com).

⁵ John Hagel III, "Good Leadership Is About Asking Good Questions," *Harvard Business Review*, January 8, 2021 (hbr.org).

⁶ For example, in the November 2022 *TELUS Mental Health Index* report, respondents who said their ideas are valued at work had a significantly higher mental health score (as measured by the Mental Health Index) than those who disagreed or were unsure (go.telushealth.com).

⁷ Stephen Trzeciak and Anthony Mazzarelli, *Compassionomics: The Revolutionary Scientific Evidence that Caring Makes a Difference*, 2019.

LIFELONG LEARNING

PD PROGRAM HIGHLIGHTS

Anti-Money-Laundering CPD Requirement – Free Seminars

As noted in the November/December 2023 issue of *CPABC in Focus*, CPABC has introduced a mandatory CPD requirement for all members to complete anti-money-laundering-related professional development (AML PD), effective January 1, 2024. Members have until **December 31, 2026**, to complete 1.5 hours of verifiable AML PD, unless they are granted a CPD exemption. To help members satisfy the new AML PD requirement, we are offering the following on-demand seminars for free:

Anti-Money Laundering and Anti-Terrorist Financing Foundations for CPAs

In addition to covering the basics of money laundering and terrorist financing, this session will review the various regulatory considerations and discuss the important role BC CPAs play in combatting financial crime.

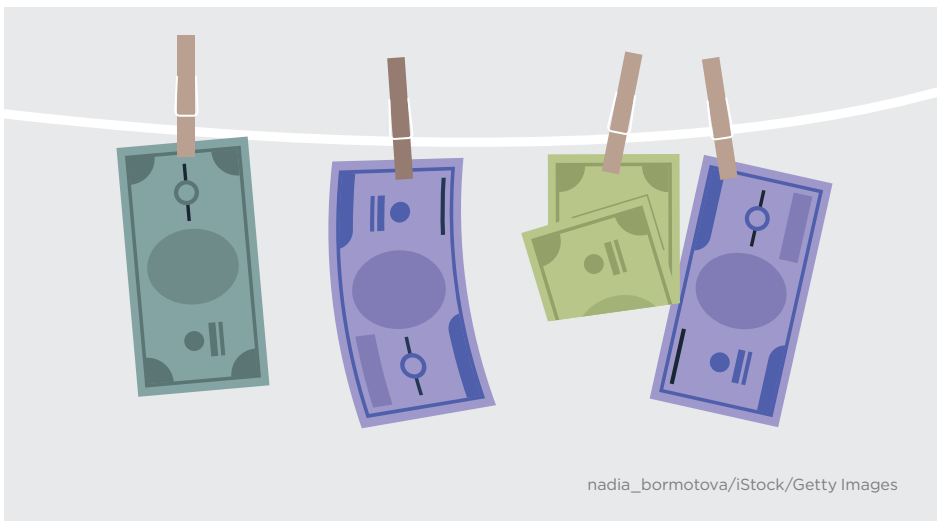
Anti-Money Laundering and Terrorist Financing Update: Keeping Up with AML Risks and Requirements

This fast-paced session will provide participants with an overview of critical developments and compliance requirements, advise them of what to expect in the coming year, and point them to additional resources.

AML Compliance: Regulations Affecting CPAs

The session will discuss the FINTRAC reporting obligations for CPAs and the triggering activities—such as purchasing or selling assets on behalf of a person or entity—that underscore the importance of designing and implementing a robust AML compliance program.

Visit pd.bccpa.ca for course details and bccpa.ca/cpd for more information on the new AML PD reporting portal.



Mia Maki, FCPA, FCMA

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This program is designed to help you enhance your role on the management team by sharpening your skills in risk management and controls, ethical leadership, planning, budgeting and forecasting, performance measurement approaches, and financial reporting. It will be presented by Mia Maki, FCPA, FCMA, a principal of Quimper Consulting Inc. and an associate teaching professor and associate dean of external & outreach for the Peter B. Gustavson School of Business at the University of Victoria.

More info at
pd.bccpa.ca



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Accountants, Meet Chatbot: Your Beginner's Guide to Getting the AI ChatGPT Conversation Started

This course will highlight the game-changing potential of ChatGPT and its specific benefits for accountants in their analytical and advisory roles. It will demonstrate how this AI tool can be seamlessly integrated into various platforms, making it a versatile and valuable addition to accountants' professional tool kits.

Canada's Innovative New Legislation for Mid-Sized Business Successions

Any CPA who advises or works for mid-sized private companies in Canada needs to be familiar with Canada's new Employee Ownership Trust (EOT) legislation, which came into effect on January 1, 2024. This seminar will cover how EOTs are structured, how this type of sale transaction works, and what the requirements are to qualify as an EOT.

ChatGPT for Innovative Business Advisory Services

The course will provide a concise overview of how to leverage ChatGPT to innovate and enhance business advisory services in the accounting sector. Integrating theory and practice, the course will demonstrate how various enterprise evaluation methodologies can be applied in conjunction with ChatGPT to create more efficient business analysis and increase profitability and growth.

Email Etiquette: Engage Their Attention, Get Their Best Response

This course will show you how to write well-crafted and thoughtful emails so you can get the information you need from clients quickly and easily. You will learn how to use mind maps, the Gunning Fog Index (a readability test for English writing), and plain language to hone your communications.

Harness Anxiety to Energize Productivity

Being highly anxious is like having an overly sensitive smoke alarm system in your body. In this live, interactive virtual seminar, you'll learn how to channel anxious energy in a positive way to help you feel better and be more productive.

Racism, Multiculturalism, and Social Savvy

When it comes to racism and bigotry, divisive propaganda obscures the real issues and blocks reasonable conversation. This workshop will help you cut through the noise and navigate diverse workplaces and our multicultural world.

The Ethical Collapse of FTX - Thinking Beyond the Obvious

After starting with a comprehensive overview of the FTX collapse and an understanding of the key stakeholders involved, this course will use role play to spark critical thinking about the "other side" and have participants reflect on how they could have done things differently.

Why Successful Companies Fail: Forewarned Is Forearmed

Designed by a former business owner, CEO performance coach, and strategic advisor of more than 50 years, this one-off webinar will tell you what you need to know and do to ensure that your current success doesn't "kill the golden goose." Says the instructor: "Timely and artful diagnosis precedes remedy."

PD PASSPORT REMINDER

Be sure to use your remaining 2023-2024 PD Passport credits before time runs out! They are valid for seminars offered through August 31, 2024, and any unused credits cannot be refunded, credited, or carried forward after this date.

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MEMBERS IN FOCUS

ANNOUNCEMENTS AND ACCOLADES

Kudos!

2024 PEAK Awards

CPABC is proud to announce that four members have been recognized by the Association of Women in Finance with a 2024 PEAK Award. Congratulations goes to Kate Furber, FCPA, FCA (Champion); Wendy Leong, CPA, CA (Significant Board Contribution); Anna Marks, CPA, CA (Lifetime Achievement); and Diana Vuong, CPA, CA (Excellence in Industry).



Kate Furber



Wendy Leong



Anna Marks



Diana Vuong



Hugh Lindsay, FCPA, FCA, was recently awarded the Sovereign's Medal for Volunteers by the Governor General of Canada. Hugh's dedicated service spans nearly 60 years, and he has shared his time and expertise with numerous organizations within the accounting profession, the insurance industry, and his community. Hugh was elected to Fellowship in 2001. He also holds the chartered insurance professional designation.



Carlo Valente, CPA, CA, has been appointed chief financial officer of Nano One Materials Corp. in Burnaby. Carlo has served in many CFO roles during his career, most recently working for Andion Global Inc. in Vancouver.



Marie Yan-Klassen, CPA, CGA, was recently appointed vice-president of student enrollment and membership at CPABC. Prior to joining CPABC, Marie worked at the Ministry of Finance for several years, most recently serving as the team leader of workload development for the ministry's consumer tax branch.



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Making a Difference

In January and February 2024, CPABC chapter volunteers participated in three charitable events to support causes in their communities:

On January 27, volunteers from the CPABC Vancouver Chapter helped sort, portion, and re-package bulk-food donations at Quest Food Exchange's main distribution centre in Vancouver. Quest Food Exchange helps bridge the gap between food banks and grocery stores by providing low-income individuals with access to healthy and affordable food at five locations across the Lower Mainland.

On February 22, the CPABC Victoria/Southern Vancouver Island Chapter hosted its annual Lunar New Year fundraiser dinner and raised more than \$5,500 in support of the CPA Award in Accounting at Camosun College (see right for more details).

Then, on February 24, members of the CPABC Surrey/Langley/North Delta Chapter, along with their friends and families, participated in their local "Coldest Night of the Year" charity walk and raised \$1,370 to support Cloverdale Community Kitchen. The walkers enjoyed snacks and hot chocolate breaks along the way, and the event concluded with a dinner hosted by Cloverdale Community Kitchen.



CPABC Chapters Celebrate Lunar New Year



CPABC's Burnaby/New Westminster and Victoria/Southern Vancouver Island chapters recently rang in the Year of the Dragon at their annual Lunar New Year gatherings.

On February 3, the CPABC Burnaby/New Westminster Chapter hosted nearly 130 CPABC members, candidates, students, and guests at the Grand Crystal Seafood Restaurant in Burnaby for a 10-course luncheon to celebrate Lunar New Year. The event also served as an opportunity to congratulate the candidates from the chapter who'd successfully passed the 2023 writings of the CFE. Each CFE writer went home with a CPABC-branded dragon keepsake.

On February 22, the CPABC Victoria/Southern Vancouver Island Chapter hosted its Lunar New Year event at Don Mee Seafood Restaurant in Victoria. This year's event garnered the highest attendance to date, as 220 members, candidates, students, and guests gathered to take part in the festivities, which featured an online auction and 50/50 raffle that raised more than \$5,500 in support of the CPA Award in Accounting at Camosun College. The evening kicked off with opening remarks from Cindy Choi, FCPA, FCGA, who has been involved in organizing this annual event for several years. Choi then invited Jeety Bhalla, CPA, CA, chair of the Camosun College Foundation, and Martha Okot Thomas, CPA, CA, department chair of the Camosun College School of Business, to share a few words about the positive impact the award has on its recipients and thank attendees for their generous support.

Both chapters would like to thank everyone who took part in these sold-out events!

Want to get involved in upcoming chapter events?

Be sure to check bccpa.ca/chapter-events for community engagement opportunities with your local chapter. And if you have a community event you think CPABC members, candidates, and students may be interested in supporting, contact your local chapter online or email chapters@bccpa.ca.

MEMBER RECOGNITION

CPABC's 2024 FCPA and Member Recognition Events Celebrate Outstanding Achievement



CPABC's 2023 honourees. Standing (l to r): Jason Lum, CPA (Early Achievement Award); Amy Duncan, CPA, CGA (Early Achievement Award); Kristine Simpson, FCPA, FCA; Miranda Cook, CPA, CGA (Distinguished Service Award); Ian Cameron, FCPA, FCA; Judith Marriott, FCPA, FCA; Alan Cosgrave, CPA, CGA (Distinguished Service Award); Valerie Warren, FCPA, FCA; Brent Wolfe, CPA (Early Achievement Award); Bev Pao, FCPA, FCA; Ron Royston, CPA, CA (Distinguished Service Award); Duncan Sinclair, FCPA, FCA; Jervis Rodrigues, FCPA, FCA; Scott Munro, FCPA, FCA; Elaine Kam, FCPA, FCA; Greg Buck, FCPA, FCA; Paul Hazra, FCPA, FCA; and Aaron Cheung, CPA, CA (Early Achievement Award). Seated (l to r): Am Lidder, FCPA, FCA; Geoff Dodds, FCPA, FCA; Linda Christie, CPA, CMA (Early Achievement Award); Zahra Kolia, CPA, CA (SA) (Early Achievement Award); Shailene Caparas, CPA, CGA (Early Achievement Award); Gina Arsens, FCPA, FCA; and Bryce Davis, CPA, CA (Early Achievement Award). Not in attendance: Greg Smith, FCPA, FCA; and Trisha Tannis, FCPA, FCGA, FCA (BB). Photo by Kent Kallberg Studios.

FCPA Dinner

On February 28, CPABC held its annual FCPA Dinner at the Terminal City Club to welcome the 16 members who were elected to Fellowship in 2023. Approximately 115 people gathered to celebrate these remarkable individuals. The lively evening also provided the FCPA community an opportunity to connect with their peers and recognize the contributions of all FCPAs to the accounting profession, business sector, and the community.

Member Recognition Dinner

On April 3, approximately 250 people gathered at the Fairmont Waterfront Hotel for CPABC's Member Recognition Dinner, where 27 CPAs were celebrated for their exceptional achievements. This year's honourees were recognized in the Early Achievement, Distinguished Service, and Fellowship categories (you'll find their profiles on pages 15-29). Attendees included family members, colleagues, and friends of the honourees, as well as special guests representing CPABC's Board of Directors, Executive Management Committee, and two member recognition committees.

In keeping with past events, the gala featured a networking reception, dinner, and an awards presentation that included video interviews with the honourees.

Congratulations to all of the honourees—the profession is proud to celebrate your many contributions and achievements as leaders, trusted advisors, volunteers, and educators!



1. Early Achievement Award recipient Aaron Cheung, CPA, CA (centre), celebrates with Tannie Lam, CPA, CA (left), and Carol Lee. 2. Sheila Nelson, CPA, CA (left), chair of CPABC's two member recognition committees, and CPABC Board Chair Chris Gimpel, CPA, CA (right), present Ron Royston, CPA, CA, with his Distinguished Service Award. 3. Am Lidder, FCPA, FCA (second from right), poses for a photo with her family. 4. Valerie Warren, FCPA, FCA, captures the moment with her family. 5. Scott Munro, FCPA, FCA, and his family are all smiles. 6. Paul Hazra, FCPA, FCA, celebrates with his wife Tracy. 7. Early Achievement Award recipient Shailene Caparas, CPA, CGA (centre), shares the moment with her guests. 8. Greg Buck, FCPA, FCA (centre), strikes a pose with friends and family. 9. Honourees Brent Wolfe, CPA (second from left), Alan Cosgrave, CPA, CGA (third from right), and Bryce Davis, CPA, CA (far right), celebrate with their guests. All photos by Kent Kallberg Studios.



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SNAPSHOT:

Carlos Yam, CPA,
CA, CPA (Illinois)

The job: Chief financial officer of the Vancouver Art Gallery.

Career pivot: Carlos joined the Vancouver Art Gallery in January 2024 after working in the private sector for 25 years. “I was deeply drawn to the Gallery’s campaign to build a new, purpose-built home that could serve as a model for other modern museums.”

Biggest change: Leading a non-financial mission. “Advancing art and culture goes beyond selling admission tickets, and that requires a more purposeful balance between social goals and financial sustainability.”

Best part of the job: Working with a multidisciplinary team. “Everyone has diverse skills and backgrounds (artistic or otherwise!), and they’re passionate about contributing to the future success of the Gallery.”

Greatest perk: An all-access pass. “When I need a short break from work, I enjoy walking through the Gallery’s exhibitions.”

Favourite exhibit: *Emily Carr: A Room of Her Own*. “Emily Carr is such a significant artist in Canada’s history, and I appreciate the way she captures the beauty of our local landscape.”

You can read more about Carlos’s career journey at bccpa.ca/newsroom.



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