

CAPCOE COURSE MATRIX 2005

COURSE NAME	COMPETENCIES								
	Org Eff, Control & Risk Mgmt	Finance		Taxation	Assurance	Performance Measurement		Information Technology	Professional Skills
		Corporate Finance	Wealth Management			Financial Reporting	Mgm't Reporting		
ACCOUNTING SEMINARS									
Accounting, Auditing & Professional Practice Update					X	X			
Accounting Update for CAs in Industry – Non-Public Companies						X			
Accounting Update for CAs in Industry – Public Companies						X			
Advanced Accounting Issues						X			
Auditing Refresher					X				
Back to the Future: Internal Control Documentation and Certification	X				X				
Bridging the GAAP: Canadian/US GAAP Differences					X	X			
CICA 3870 Stock Based Compensation						X			
CICA Handbook Accounting Refresher					X	X			
Effective Use of Analytical Procedures					X				
The Essentials of Review Engagements					X				
File Review Methodologies					X				
Financial Statement Presentation & Disclosure						X			
Fraud Awareness for CAs in Industry	X				X				
Fraud Awareness for CAs in Public Practice	X				X				
Legal Office Trust Reporting					X				
Non-Profit Organizations and Registered Charities: Accounting and Taxation Issues				X	X	X	X		
PSAB Update					X	X			
Quality Assurance Workshop	X				X				
Related Party Transactions: What is at Stake?				X	X				
Revenue Recognition					X	X			
Review & Compilation Engagements: A Review of the Options and Requirements					X	X			
Sarbanes-Oxley/Bill 198 Compliance – An Overview					X	X			
Sarbanes-Oxley/Bill 198 Compliance Workshop					X	X			
FINANCE									
Analysis, Financing & Completion of Acquisitions		X							
Business Valuation - Introduction		X							
Business Valuation - Intermediate		X							
Business Valuation - Advanced		X							
Corporate Treasury Management	X	X					X		
Due Diligence in an Investment Context		X			X				

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PRACTICE MANAGEMENT									
Marketing for the Modern Practitioner	X								
Practical Privacy for CAs	X								
Seven Areas to Improve Marketing Professional Services	X								
Succession Planning for Today's Practitioner - The Insider's Guide to Making a Deal			X	X					
PUBLIC COMPANIES									
Assurance & Accounting Issues for Public Companies					X		X		
Financial Reporting for Preparers of Public Company Financial Statements						X			
IPO' S, Prospectuses, and Stock Exchange Listings						X			
Management Discussion & Analysis	X					X			
Public Company Reporting: Annual Update						X			
Raising Equity in Canada – Going Public						X			
WEALTH MANAGEMENT									
A Creative Review of Compensation Topics in the Small Business Context			X	X					
Estate Planning for High Net Worth Individuals			X	X					
The End of RRSPs and IPPs?			X	X					
Unveiling the Retirement Myth			X						
MANAGEMENT SEMINARS									
COMMUNICATION									
Communicating Under Pressure									X
I'm Right – You're Wrong!									X
Managing the Difficult Conversations									X
Presentation Skills Coaching Clinic									X
Sharpening Your Business Writing Skills									X
Speed Reading - Read Twice as Fast and Retain More									X
Talk Your Way to the Top: Managing and Maximizing Relationships									X
Think on Your Feet®									X
You – the Confident, Dynamic Speaker									X
									X
CONTROLLERSHIP/ MANAGEMENT ACCOUNTING									
Building Better Business Cases	X						X		
Controllership – A 'Partner' for Business	X	X					X		X

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Credit and Collection	X								
Current Trends of the Financial Executive	X	X							
Effective Financial Analysis for Business Decisions – Small Businesses	X	X					X		
Financial Tools That Go Beyond the Statement: Industry Focus		X					X		
Getting the Bank to say “Yes”	X	X					X		
Practical Guide for Controllers and CFOs in the High Tech and Biotech Industries	X	X					X		
Using Activity-Based Costing and Management (ABC/M) and Activity based Budgeting (ABB) for Improved Profitability & Performance	X	X					X		
ECONOMIC/ LEGAL/ INDUSTRY SPECIFIC									
Entrepreneurship and Innovation – The Engine for Corporate and Economic Success	X								
Globalization - Economic and Social Implications	X								
The Peaceful Rise of China ... the Economic Resurgence of Japan	X								
Reduce Your Exposure to Directors' & Officers' Liabilities	X								
You and Your CA Designation									
GOVERNANCE/ NEGOTIATING/ STRATEGIC PLANNING									
Addressing Conflict in the Family Firm									X
Corporate Governance: Leveraging Human Capital	X								
Developing a Strategic Mindset									X
Negotiating I									X
Negotiating I: Strategies and Skills for Effective Negotiations									X
Negotiating II									X
Negotiating II: The Challenges and Pitfalls of Negotiations									X
Negotiating III: Cross-Cultural & Team Negotiating									X
Performance Indicators for the Public Sector	X						X		
Preventing and Dealing with Board Dysfunctions									X
Resolving and Managing Conflict									X
Risk Management From All Angles	X						X		
Turning Conflict into Cooperation									X
What am I Getting Into? – Due Diligence for the Prospective Board Member									X
HUMAN RESOURCE									
A Creative Review of Compensation Topics in the Small Business Context	X								
Cost Control for Employee Benefits	X		X						

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Excel Budgeting Techniques								X	
Paperless Office - Managing Documents in a Digital World								X	
TAXATION SEMINARS									
A Creative Review of Compensation Topics in the Small Business Context			X	X					
Advanced Tax Planning Strategies				X					
Basic but Essential Income Tax Issues for the General Practitioner				X					
Business Succession for the Entrepreneurial Client			X	X					
Charitable Giving: Tax Issues & Planning Techniques				X					
Corporate Reorganizations				X					
Corporate Tax Returns				X					
Corporate Tax Returns Workshop				X					
Current Strategies in Tax Dispute Resolution				X					
General Practitioners – Important Tax Issues You Need to Know				X					
GST and Real Property – Tips & Traps				X					
GST Refresher for Professionals				X					
Income Splitting				X					
Income Tax Issues for the File Preparer				X					
Income Tax Refresher for Corporate Tax Planning				X					
Income Tax Refresher for Personal Tax Planning				X					
Income Tax Update 2005				X					
Income Tax Update for Industry				X					
Integration 2005				X					
Loss of CCPC Status				X					
Mom Always Liked You Best: Disgruntled Beneficiaries and Other Estate Challenges				X					
Non-Profit Organizations and Registered Charities: Accounting and Taxation Issues				X	X	X			
Owner Manager Compensation: Latest Trends				X					
Partnerships				X					
Personal Tax Returns				X					
Personal Tax Returns Workshop				X					
Preparing the T4 Summary and Supplementary				X					
Probate Fee Avoidance Planning				X					
PST Refresher				X					

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Purchase & Sale of a Business				X					
Related Party Transactions: What is at Stake?				X	X				
RIP: Compliance Matters Related to Terminal Filing Preparation				X					
RIP: Estate Planning to Minimize Tax Leakage				X					
Section 85: Transfer of Property				X					
Settlement Strategies in Tax Disputes				X					
Selected Tax Issues for the Mining Industry				X					
Shareholders Agreements – Tips and Traps				X					
Taking Advantage of New Developments in Customs				X					
Tax & Real Estate: What Do You Need To Know?				X					
Tax Decisions with Long Term Implications				X					
Tax for Controllers	X			X					
Tax Issues for Private Corporate Groups				X					
Tax Strategies for Corporations in Financial Difficulty				X					
Tax Planning for Business Succession			X	X					
Taxation of Employee Benefits				X					
Taxation of Domestic Family Trusts: Basic				X					
Taxation of Domestic Family Trusts: Advanced				X					
Transfer Pricing: Latest Developments				X					
Trust: Spouse Trust, Joint Partner Trusts, Alter Ego Trusts & Protective Trusts				X					
US TAX									
Advanced Personal Cross Border Issues				X					
Introduction to US Corporate Taxation				X					
US Sales Tax 101				X					
Understanding and Managing US State Taxes				X					
US State and Local Tax				X					
US Taxation of US Citizens Abroad				X					