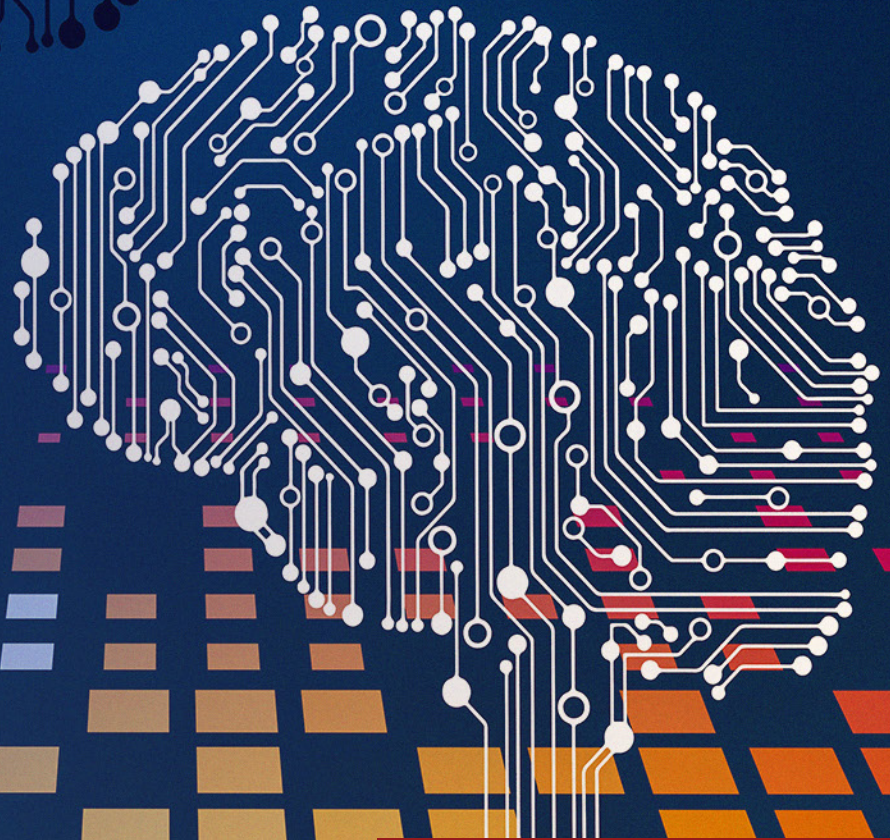


# STRENGTHEN & ENRICH



Annual Report

2023-2024



CCPAA 加中专业会计师协会  
Canadian-Chinese Professional Accountants Association

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Website [ccpaa.ca](http://ccpaa.ca)  
LinkedIn [ca.linkedin.com/in/ccpaa](https://ca.linkedin.com/in/ccpaa)  
WeChat [ccpaa-on](#)

# LETTER FROM THE BOARD



**Joe Li**  
Chair of the Board  
of Directors

Dear CCPAA-ON Community,

As we're about to step into another new fiscal year, I want to say a big thank you. You've all been amazing, showing such resilience and adaptability, and making real progress in the community. On behalf of the Board of Directors of CCPAA-ON, I must say that we are proud to see the progress and we are proud of the part that CCPAA-ON has played.

Our journey has been incredible, and it's all thanks to a fantastic Board, our dedicated President – Mia Ma, and our enthusiastic group of volunteers. And let's not forget our sponsors – CPA Ontario, KPMG LLP, Amistar Capital Group Inc., XS Law Professional Corporation, KVB Canada Inc., Neutral Pilates, and Skills4Good. They've been a huge help, especially with our professional development events. These events have not only offered enriching insights practicing accountants, but have also had a significant impact on international students and foreign-trained CPAs within our community.

One of the exciting developments that we continue to observe this year is the rise of generative AI in the accounting industry. This technology is revolutionizing the way we work, automating routine tasks and freeing up our time to focus on more strategic initiatives. It's also helping us to generate insights from our data that we could never have discovered on our own. This is a game-changer for our profession, and I'm excited to see how we can leverage it to take our profession and our community to even greater heights. For more insights on this topic, come join us at our Annual Conference on October 27, 2024!

Looking ahead, we're committed to helping you grow and connect. We'll keep bringing in top professionals to share their insights, and we're planning more in-person events. I can't wait to meet more of you at these events.

In conclusion, I extend my gratitude to each one of you for your support to the CCPAA-ON community. Together, we are stronger, and together we will grow.

Sincerely,

*Joe Li*

Chair of the Board of Directors  
Canadian-Chinese Professional Accountants' Association - Ontario Chapter

# LETTER FROM THE PRESIDENT



**Mia Ma**  
President

Dear CCPAA-ON Members and Friends,

As President of CCPAA-ON, it is my great privilege to reflect on another successful year for our association. This success would not have been possible without the tireless efforts of our dedicated volunteers, whose time and energy have been instrumental in organizing our events and initiatives. I would also like to extend my heartfelt thanks to our board members and expert speakers, whose professional knowledge and guidance have been invaluable to the development of our programs. Furthermore, I would like to express our sincere gratitude to our sponsors, whose financial support has enabled us to continue delivering high-quality programs and resources to our community.

Our association's mission remains at the core of everything we do. We are committed to synergizing Chinese professional associations to create a strong and dynamic professional network. This network empowers CPA professionals by providing access to the latest industry knowledge and insights, helping them to continuously sharpen their skill sets and remain competitive in an ever-changing landscape. We are also dedicated to supporting the future growth of young professionals by offering them opportunities to learn, connect, and advance their careers in accounting and finance.

Looking ahead to 2024, we are excited to announce our annual conference will focus on the topic of "GenAI Horizons 2024: Innovation, Ethics, and Practice". This timely theme underscores the critical importance of staying informed about technological advancements that will shape our industry. We are committed to staying at the forefront of these changes and will continue to provide our members with the knowledge and tools they need to navigate this evolving landscape.

Thank you all for your unwavering dedication to CCPAA-ON. Together, we will continue to face challenges and seize opportunities with professionalism, innovation, and collaboration.

Sincerely,

*Mia Ma*

President  
Canadian-Chinese Professional Accountants' Association - Ontario Chapter

# Canadian-Chinese Professional Accountants Association

Ontario Chapter  
NPO Since 2008

We come together to promote **professionalism**, develop well-rounded **leadership skills**, and grow our **network**.

## Serving Canadian-Chinese Professionals

The Chinese-Canadian Professional Accountants Association Ontario Chapter (CCPAA-ON) is an independent, not-for-profit organization of professionals and scholars who are of Chinese origin and work in accounting, auditing and taxation or related areas, including banking, investment, insurance, education institutions, and government agencies. We work to introduce fellow CPAs to career paths beyond the traditional audit and tax, as well as upskill our members and introduce them to the newest industry changes.

## Mission

CCPAA-ON seeks to enhance communication between Canada and China in research, education, regulation, and business practices in accounting, auditing, finance, taxation, and related areas.



## Goals

- CCPAA-ON encourages members to develop their career paths and professional competency.
- CCPAA-ON encourages members to understand both Canadian and Chinese accounting, auditing, finance, and taxation systems from a broad view and actively participate in the modernization and globalization process of accounting and related industries.
- CCPAA-ON welcomes opportunities such as joint research projects, education programs, and publications in accounting, auditing, finance, taxation, or related areas.

## Objectives

1. To facilitate the career and professional development of members in the accounting industry.
2. To provide networking opportunities and enhance interaction among professional accountants in Canada and China.
3. To encourage members to understand Canada and China's accounting, auditing, taxation, and finance systems.

Professional  
Development



Business  
Networking



Career  
Coaching



15<sup>th</sup> Annual Conference

# Deal Flow: Navigating Merger and Acquisition Transactions

The year 2023-2024 marked another year of growth for the CCPAA-ON against the backdrop of changes in the global and Canadian markets, as the world navigates how to reconcile the adjustments resulting from the global pandemic with what was once considered "normal". The period leading up to the year was marked by significant shifts in the M&A landscape as companies navigated the shifting financial terrain.

In this environment, CCPAA-ON ended the 2022-2023 year with its 15th annual conference and its first in-person conference since the pandemic. CCPAA-ON was honored to host a diverse group of M&A industry professionals covering a broad spectrum of professional services that help companies execute transactions.

The conference, "Deal Flow: Navigating Merger and Acquisition Transactions," featured speakers who shared their views on the current and future of the Canadian and global M&A markets from a financial, legal, accounting, tax and valuation perspective. This provided attendees with a comprehensive view of the deal lifecycle and the various considerations involved in a transaction. Attendees also had the opportunity to listen to a moderated panel of these experts share further insights, ask their own questions, and then network.

The 2023-2024 year began with CCPAA-ON's on-going collaboration with other groups through the 2024 CPA Own Your Future Career and Job Fair with CPA Ontario, the Startup Success Series with the Asia American Innovation Alliance, the Explore Your Future Opportunities with ID8 Ventures, and the Ignite Your Career event with CPAC Enlight.

Mergers and acquisitions (M&A) refers to the consolidation of companies or their key business assets through financial transactions between companies. These financial transactions are largely debt-driven, as companies typically do not have all of the cash required for such large transactions.

The Canadian M&A market has seen significant changes in transaction volume over the past four years. It started with an uptick, largely driven by lower interest rates at the beginning of the COVID-19 pandemic in 2020 and 2021, and then the uncertainty caused by successive interest rate hikes, market volatility and geopolitical tensions cooled the market in 2022 and 2023.

This year, CCPAA-ON also hosted a number of events across its three pillars of Professionalism, Leadership, and Networking, with specific events aimed at young professionals preparing to become CPAs, such as an event on the Common Final Evaluation (CFE) exam. CCPAA-ON also introduced a series of themes within the Professionalism pillar, focusing on startup success, strengthening technical skills, professional technical updates, and soft skills development. This provided attendees with a wide range of topics that allowed them to improve both their soft and technical skills, as well as network with other CPAs.

With the world constantly innovating, it is no surprise that Generative Artificial Intelligence ("Gen AI") has taken the world by storm in the past year. Many different companies have introduced Gen AI programs that generate content, images, videos, and even help prepare for job interviews. However, as with all new technologies and phenomena, there are uncertainties: what are the threats and how do we mitigate them? What opportunities does it offer the world, and more specifically, what opportunities does it offer CPAs? At the 16th Annual Conference, CCPAA-ON will share insights on these topics and more from industry professionals with experience working with this emerging technology and help attendees gain a deeper perspective.



Startup Success Series:  
**Comprehensive Strategies for Growth and Exit**

2024-03-14

### Startup Valuation and ESOP Tax Consideration

Speakers

**Jin Wen** CPA, CA, Tax Partner, Grant Thornton

**Victor Wong** CPA, CMA, CBV, Partner, Valuation Practice, MNP

**Danae Li** CPA, CA, CBV, Senior Manager, Valuation Practice, MNP

**Tony Zhu** CPA, Manager, Valuation Practice, MNP

This webinar provided deep insights into business enterprise valuation techniques, pitfalls to avoid, and financial instruments crucial for capital raises across different company stages. Participants gained a comprehensive understanding of ESOP taxation rules, the effects of stock-based compensation on company valuation, knowledge of critical financial strategies for startups and beyond, and practical examples illustrating these concepts.

2024-02-15

### SAFE Agreement - Financing and Tax Planning

Speakers

**Jin Wen** CPA, CA, Tax Partner, Grant Thornton

**Ruming Liu** Founding Partner, Silicon Valley MagStone Law LLP

Following a dynamic event focused on startup finance and tax planning, experts delved into crucial topics including Simple Agreement for Future Equity (SAFE) terms, tax structuring, and strategic considerations for startups. Attendees gained exclusive insights and practical guidance on navigating complex investment terms and protecting entrepreneurs' interests in today's thriving economic environment. This session proved invaluable for startup founders, team members, advisors, and investors alike, shaping critical perspectives for future success in the startup ecosystem.

2024-05-16

### Startup Exit Strategy

Speakers

**Dr. Sue Xu** Managing Partner, Amino Capital

**Ines Yu** MTax, CPA, CA, Partner, M&A Canadian Tax, Deloitte

**Joyce Dai** CPA, CA, Partner, M&A Advisory, Deloitte

This webinar delved deeply into Startup Exit Strategy and Tax Restructuring, featuring expert insights on pre-IPO tax restructuring, tax due diligence, audit defence, tax accounting, internal controls, and optimization strategies. Participants gained valuable perspectives from both entrepreneur and investor viewpoints on crafting effective exit strategies, with an enhanced understanding of tax considerations crucial for startup success and growth.



Operated by hundreds of professional individuals, CCPAA-ON is proud of our professionalism and achievements as a member to member serving organization.

# PROFESSIONALISM





Series:  
**Strengthen Technical Skills**

2023-11-21

### Tax Considerations in Real Estate Law

Speaker

**Xin Sun** Principal Lawyer, XS Professional Corporation

This webinar explored crucial tax considerations in Ontario real estate transactions, focusing on the Land Transfer Tax, Non-Resident Speculation Tax, and Harmonized Sales Tax (HST). The speaker provided insights on minimizing tax liabilities and navigating HST complexities.

2024-02-27

### Sustainability in Corporate and Financial Markets

Speakers

**Hao Tian** FRM, Director, Sustainability Advisory, CIBC

**Mary Chan** CFA, CPA, CA, Director, Sustainable Finance, CIBC Capital Markets

This enlightening session navigated the evolving dynamics of sustainable finance. Speakers led a thought-provoking discussion on the sustainable financial market, exploring its current landscape and implications for businesses. Participants gained insights into how sustainability influences asset valuation, risk management strategies, and innovative market solutions.

2024-05-28

### How to Avoid Large CRA Audits

Speakers

**Dean Blachford** LLB, BCL, Owner, Blachford Tax Law

**Ella Sui** Tax Clerk, Blachford Tax Law

The speaker focused on navigating complex tax audits conducted by the CRA, offering strategies to resolve disputes effectively. Attendees gained insights into CRA's audit selection criteria, audit techniques, and measures to safeguard clients during audits. This webinar covered common audit challenges including net worth audits for restaurants and contractors, real estate audits like property flipping, and audits concerning input tax credits, providing valuable guidance for managing these issues proactively.



Series:

## Core Professional Updates

2024-03-27

### Digital Sales Tax & Forced Labour Reporting Act

#### Speakers

**Grace Zheng** CPA, Executive Director, Indirect Tax, KPMG

**Walter Sisti** CPA, Partner, National Leader, Indirect Tax Services, KPMG

**Kenn Jordan** CPA, CCS (US/CA), CTCS, Partner, Trade and Customs, KPMG

This webinar covered essential GST/HST changes updates, followed by detailed discussions on the Digital Services Tax (DST) regime and Bill S-211 addressing forced and child labor in supply chains. Participants gained insights into the businesses affected by DST, new filing requirements, and compliance obligations. Speakers explored the comprehensive scope and upcoming deadlines under Bill S-211, highlighting its impact on supply chain reviews and disclosure requirements, and provided valuable guidance on navigating these evolving regulatory landscapes.

2024-05-07

### Introduction to EIFEL Rules

#### Speakers

**Michelle Zhang** Partner, International Tax Services, Deloitte

**Jessica Yeung** CPA, CA, Senior Manager, International Tax, Deloitte

Speakers introduced Budget 2021 to align with Action 4 of the Base Erosion and Profit Shifting Project, providing a comprehensive overview. Participants gained insights into how these rules limit deductions of net interest and financing expenses for taxable income calculations. This webinar also covered impacted taxpayers, the application of the Excessive Interest and Financing Expenses Limitation (EIFEL) rules, and potential relief measures available under this regime, offering clarity on navigating these important tax considerations.

2023-11-09

### VBA As An Everyday Solution

#### Speaker

**Fredrick Zhou** Manager, TD Wealth Operations

In this webinar, the speaker demonstrated the evolution of an Excel sign-in sheet that was created in two hours, including the logic and related VBA solutions, and then used the sheet at the CCPAA annual conference sign-in desk. The speaker also paired the demonstration with an explanation of the basic VBA syntax and formulas used.

2024-07-27

### Canadian Investments introduction and Midyear Market Outlook

#### Speaker

**Tony Yuan** CIM, MSc, Vice President and Head of Products and Strategy, AimStar Capital Group Inc.

This seminar on Canadian investment options covered essential topics including tax-advantaged accounts, investment income taxation, and a wide array of financial products from mutual funds to private REITs and structured notes. Participants gained insights into midyear market trends, economic analysis, and strategies to optimize returns and manage risks in today's financial landscape. The speaker aimed to equip attendees with the knowledge and networking opportunities needed to make informed decisions and effectively manage personal investments for long-term financial success.

2024-10-08

### Family Law Uncovered: Essential Legal and Tax Insights for Professionals

#### Speakers

**Jian Kang** Counsel, XS Professional Corporation

**Jason Simon** CPA, CA, Partner, Kraft Berger LLP

The webinar addressed the protection of family assets and optimization of tax planning within the context of family law. Accounting professionals explored the integration of legal and tax considerations, including the impacts of support payments, property division, and the utilization of family law agreements and trusts.



Series:

## Hard and Soft Skills Development

2024-06-23

### From Stress to Success: Psychological Strategies for Career Advancement

#### Speaker

**Mei (May) Long** CPA, MBA, Senior Director in Finance, CIBC

This career workshop centered on recognizing and transforming workplace stress into opportunities for career advancement, offering participants practical strategies and psychological frameworks. Attendees gained insights into managing stress effectively, empowering them with tools to enhance both professional and personal aspects of their lives. This seminar also fostered awareness of internal strengths and aimed to equip participants with actionable steps to achieve career growth and personal well-being.

## We Work Closely with CPA Ontario to Promote Professionalism

Supported by CPA Ontario, we invited accounting professionals from various professional fields to share their personal stories about how they made the leap from a CPA to today's management position. They also shared their lessons learned along the way for us to learn from them.

## CPA Career Day: Shaping Futures, Shaping Success

### Keynote Speaker

**Grace Wang** CPA, CMA, MBA, Director of Finance & Operations, Bousfields Inc.

### CPAO Representatives

**Robin Clarke** Student Recruiter, CPA Ontario

**Carmen Jacques** CPA, CGA, Student Recruitment Manager, CPA Ontario

### Panelists

**Burnice Francis** CPA, CA, Director of Finance, Rogers Bank

**Grace Wu** CPA, CGA, CPM, Financial Controller, Call2Recycle

**Nico Yuan** CPA, CA, CFA, Manager, Financial Accounting Advisory Services, EY

**Wenyan Gu** CPA, CGA, Manager, Tax, BDO

### Mentors

**Dongsheng Wang** CPA, Senior Associate, Private Equity, SGGG Fund Services Inc.

**Julian Wu** CPA, Senior Consultant, Strategy & Deal Execution, KPMG

**Lynn Qiao** CPA, Associate Director, Investor Services, MUFG

**Zubaier Ahmed** CPA, CPA(NH), CIA, MZA CPA Professional Corporation

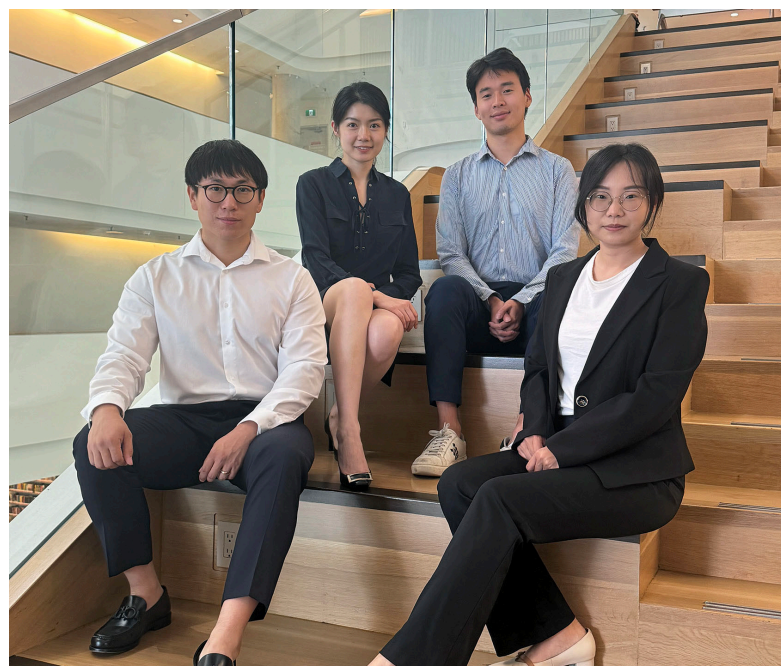
**Stephen Sieger** CPA, Director of Finance, Art Canada Institute

This seminar provided invaluable insights into the multifaceted world of becoming a CPA beyond traditional perceptions. Attendees received expert guidance on career development and an introduction to the CPA path, complemented by perspectives from mentors representing diverse backgrounds within the accounting industry. Supported by CPA Ontario, this event catered to professionals, students, and newcomers keen on exploring the dynamic opportunities within the accounting profession. Participants connected with seasoned professionals and gained insights into various career paths from tax to forensic accounting, networking with peers, and making CPA Career Day an essential step toward realizing their accounting career aspirations.

## Professional Collaboration with CPA Ontario

### 2024 CPA Ontario Own Your Future Career and Job Fair

We diversified outreach and built a talent pipeline of highly skilled, internationally educated professionals. We showcased various opportunities within PMG and raised awareness of non-traditional CPA roles and niche areas.



2024-03-18

## CPA Professional Career Path

### Speakers

**Dongsheng Wang** CPA, Senior Associate, Private Equity, SGGG Fund Services Inc.

**Julian Wu** CPA, Senior Consultant, Strategy & Deal Execution, KPMG

**Nico Yuan** CPA, CA, CFA, Manager, Financial Accounting Advisory Services, EY

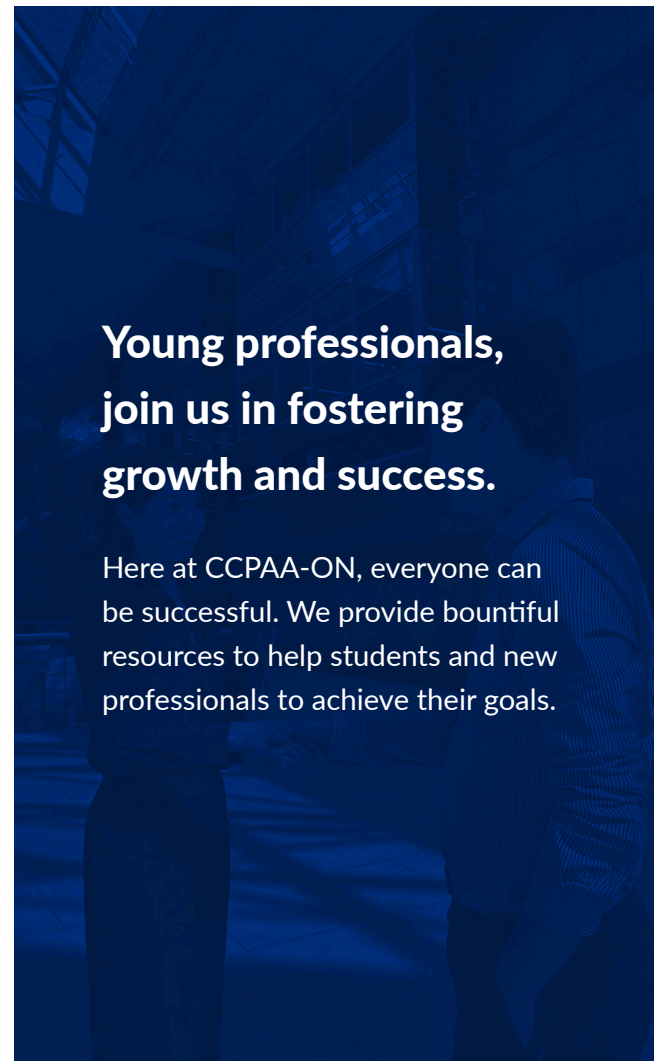
Following a reflective start to 2024 post-recovery from 2023, this event delved into career prospects for students and young professionals amidst today's competitive job market. Attendees engaged with three senior professionals boasting 5 to 10 years of accounting industry experience, who shared insights into career trajectories, and job prospects in auditing, finance, financial analysis, and M&A consulting. The session concluded with interactive group discussions where participants exchanged experiences, sought advice, and gained practical insights to navigate their career paths effectively.



## Wisdom from Experience

To help everyone better understand and prepare for the CFE exam, CCPAA-ON invited successful candidates to share their experiences and tips on passing the CFE exam. The speakers were from different backgrounds (individuals who had been working full time and ones who had been studying full time) and picked different roles (tax, assurance, and performance management). Candidates participating in the session were able to obtain advice for each of the unique situations they were in.

Understanding the struggle of CPA students who are in the Experience Verification Program, we collected many issues students were facing and organized PERT workshops to help students pass the verification assessment.



2024-01-30

## Webinar: Career Development

### Speaker

**Mei (May) Long** CPA, MBA, Senior Director in Finance, CIBC

With over 15 years at CIBC, Mei shared inspiring insights in Financial Planning & Analysis, Strategy, and more. Her guidance transcended common career myths, offering transformative strategies for professionals seeking growth and being ready to elevate their professional journey.

2024-08-11

## Accelerate Your Career Growth

### Speakers

**Vivian Li** Head of HR, People and Culture, North Horizon

**Lingping Li** ICF Professional Certified Coach, Founder, CCG Learning and Coaching Services; Head of Coaching, WeWorkingWomen

The seminar focused on enhancing communication skills for accountants, addressing client interactions, team collaboration, and data presentation. Participants gained valuable insights and practical strategies for improving their communication abilities. The event also facilitated networking with fellow accountants.

2024-10-06

## Communicate to Win: Professional Skills Summit

### Speakers

**Xin Sun** Principal Lawyer, XS Professional Corporation

**Michael Sun** Investment Director, CBRE Investment Management

Attendees gained valuable insights into building stronger client relationships, enhancing team collaboration, and clearly presenting complex data. This event provided a fantastic opportunity for accountants to refine their communication skills and network with peers.



# LEADERSHIP

We come together to develop well-rounded leadership skills. Whether you are a student, new immigrant, a junior or senior professional, we welcome you to be a member of our community.

## Volunteer Rotation Program

Join us for professional development, leadership skills, and for fun! Volunteers will have the opportunity to rotate through all operation departments (e.g., Business Development, Communication, Public Relations, Administration).

By joining the Volunteer Rotation Program, volunteers will have a cross-functional network, have a deeper understanding of the routine work of the CCPAA-ON Operation Committee, and gain unique experiences that will help to develop strong, soft skills.

## Volunteer Mentorship Program

CCPAA-ON offers volunteers a one-on-one mentorship program. If you would like to have a coffee chat with industry professionals or public accounting professionals, we will pair you with a mentor.

We also offer soft skills development workshops exclusively to volunteers to help you enhance your communication, leadership, and other important soft skills!

## Joint Event with Community Professional Associations

### Participating in WeWorkingWomen's Asian Heritage Month Leadership Forum

In May 2024, CCPAA-ON President Mia spoke as a panelist, focusing on the value of belonging: how networks can help everyone thrive, at the WeWorkingWomen Asian Heritage Month Leadership forum, which brought together over 100 attendees for an afternoon of networking and conversations on what it means to navigate life as an Asian-Canadian woman today.



# NETWORKING

CCPAA-ON collaborates with other professional associations to help accounting professionals build connections and create further career opportunities.



### 2024 Startup Success Series: Comprehensive Strategies for Growth and Exit

We collaborated with professionals from the Asia America Innovation Alliance to introduce a series of seminars:

- Venture Financing and Tax Planning - Explore the intricacies of securing venture capital, structuring investments, and optimizing tax strategies for startups.
- Corporate Valuation and ESOP Tax Considerations - Delve into corporate valuation methods, Employee Stock Ownership Plans (ESOPs) implications, and associated tax considerations.
- Exit Strategy and Tax Implications - Examine effective exit strategies, including mergers, acquisitions, and IPOs, focusing on navigating the tax landscape.

### CPAC Enlight's Unleash Your Potential: Leadership and Career Development for Prospective CPAs

This in-person event brought together diverse leaders who shared insights and experiences to inspire participants to chart their own CPA path, with a focus on how to become a CPA and then networking with professionals. Guest speakers also provided different career potentials and opportunities with a CPA designation. Members of the CCPAA team participated in giving advice to students.

### Explore Your Future Opportunities - CPA Professional Career Path with ID8 Ventures

This event educated and empowered prospective students interested in pursuing a career in accounting, in context of obtaining the CPA designation. We aim to provide valuable information, insights, and guidance to help them make informed decisions about their educational and career paths.

### 2024 Professional Career Development Forum & Job Fair

Organized by CCAA, CCEA, and CPAC and co-organized by CCPAA-ON along with other professional associations, brought together Chinese community resources to support university students, recent graduates, and newcomer professionals. The event created valuable networking opportunities, fostering early career growth and empowering young generations to build a strong, resilient professional network for the future.

Thank you to all of our speakers, we cannot achieve our objective of helping members without you!

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**Fredrick Zhou** Manager, TD Wealth Operations

**2023-11-21 Tax Considerations in Real Estate Law**

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**Rageeb Ashekin** CPA, Corporate Accountant, AltaGas

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**Jason Simon** CPA, CA, Partner, Kraft Berger LLP

# THANK YOU TO ALL OF OUR VOLUNTEERS!



Kam Gan

Effy Gong

Edward He

Jessica Jin

Marco Li

Phyllis Li

Cindy Liu

Linda Liu

Gabriella Lu

Andy Ma

Mia Ma

Lynn Qiao

Nicholas Qin

Yi Shang

Moby Sun

Dongsheng Wang

Julian Wu

Lei Wu

Rosie Wu

Ivy Yang

Nico Yuan

Jacqueline Zhang

Pennie Zhao

We appreciate the efforts of our volunteers who make all our events possible and successful. Your volunteer work has proven that one person can make a significant difference. Thank you for your enthusiasm and generosity. Your work makes our dream work!



## To Join Us

Please visit our website and submit your resume, we will follow up with you shortly.

[ccpaa.ca/volunteers](http://ccpaa.ca/volunteers)



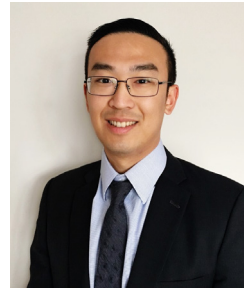




**Joe Li**  
Chair of Board of Directors



**David Cao**  
Board Member



**Shaonan Fang**  
Board Member



**Tina Liu**  
Board Member



**Grace Wang**  
Board Member



**Rachel Xue**  
Board Member



**Allen Yao**  
Board Member



**Michelle Zhang**  
Board Member



**Lei Wu**  
Board Secretary



**Pennie Zhao**  
Treasurer



**Jerom Yu**  
Board Member  
Effective Nov. 1, 2024



**Bo Yuan**  
Board Member  
Effective Nov. 1, 2024

Our Board of Directors of CCPAA-ON currently consists of nine (9) directors, including the President. The Board of Directors appoints the President, who then appoints other members in the Executive Committee.

The Board of Directors has set up a governance committee and an operational oversight committee. The directors' term of office is four years and each director can serve no more than two consecutive terms. Any vacancy occurring in the Board may be filled for the remainder of the term by the directors then in office.

The slate of directors shall be approved by the majority of the active voting members of CCPAA-ON at its annual general meeting duly called and held.

The President is elected with a regular term of three (3) years, and can be extended by the Board of Directors. The President nominates the members in the Executive Committee, which is subject to the approval of the Board of Directors. The Executive Committee is responsible for the daily operations and project executions of the CCPAA-ON.



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President and  
Board Member



**Jessica Jin**  
VP, Professional  
Development



**Cindy Liu**  
VP, Communication



**Linda Liu**  
VP, Membership



**Moby Sun**  
VP, Public Relations



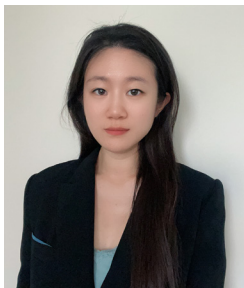
**Dongsheng Wang**  
VP, Business  
Development



**Kam Gan**  
Co - Director,  
Professional Development



**Gabriella Lu**  
Co - Director,  
Professional Development



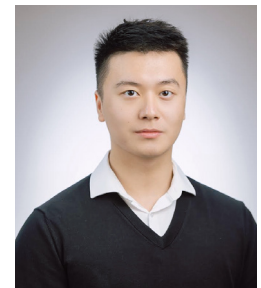
**Phyllis Li**  
Director, Communication



**Lynn Qiao**  
Director, Membership



**Effy Gong**  
Director, Business  
Development



**Julian Wu**  
Director, Business  
Development



**Andy Ma**  
Event Advisor



**Nico Yuan**  
Event Advisor



**Marco Li**  
PD Specialist



**Ivy Yang**  
Communication Specialist

# GenAI Horizons 2024

## Innovation Ethics, and Practice

Generative Artificial Intelligence, often shortened to Gen AI, refers to deep-learning models that can generate high-quality text, images, and other content based on the data they were trained on. Rooted in natural language processing, now it has seized the popular imagination.

Over the last few years, it has taken off quite quickly, with ChatGPT the most famous example of how it has affected our daily lives. This language model that was built to generate human-like text based on context has now been used to answer questions, idea generation, writing assistance, and coding assistance using just a few words to prompt the model. In the business world, many companies have built their own internal Chat GPT function, and introduced AI to different parts of their operations. While AI is sure to bring disruption to different professions and industries, it also opens up a world of different possibilities and efficiencies.

CCPAA-ON's 16th Annual Conference, **GenAI Horizons 2024: Innovation, Ethics, and Practice**, aims to understand the impact of generative AI on the different industries and career paths that CPAs have taken or will take, exploring how it is currently being used, and the future potential use cases of this technology.

## Agenda

09:00 – 09:30

Breakfast, Registration &amp; Networking

09:30 – 09:35

Conference Introduction

09:35 – 09:45

Opening Remarks from CCPAA-ON

09:45 – 09:55

Remarks from CPA Ontario

09:55 – 10:00

Sponsor Appreciation

10:00 – 10:45

### General Introduction and Recent Trends

- Introduction to GenAI and its growing popularity.
- Highlight recent examples and innovations in GenAI.

10:45 – 12:30

### Challenges, Ethics and Governance in the Adoption of Gen AI

- How to mitigate the ethical and legal risks of Generative AI with actionable steps to safeguard your profession and stay competitive in the rapidly evolving AI landscape.
- Address corporate governance challenges, risk considerations and best practices.

12:30 – 13:30

Lunch &amp; Networking

13:30 – 14:15

### Gen AI in Practice: Perspectives from Professional Accountants

- Review current applications of GenAI in accounting and its integration into practices.
- Analyze the effects of GenAI on accounting careers and opportunities.

14:15 – 15:00

### Current Implementation and Outlook of Gen AI

- Overview of GenAI deployment and training needs.
- Explore future trends and their implications.

15:00 – 15:15

Coffee Break &amp; Networking

15:15 – 16:00

### Panel Discussion

#### Panelists

Marjan Alirezaie    Josephine Yam  
Bryant Ramdoo    Vishal Gossain

**Allen Yao** CPA, CA, CFA, Partner and Senior VP, EY Canada; Board of Director, CCPAA-ON

**Carmen Jacques** Student Recruitment Officer, CPA Ontario

#### Speaker

**Marjan Alirezaie** Director of AI, Flybits

#### Speakers

**Josephine Yam** JD, LLM, MA Philosophy (AI Ethics), CEO & CO-Founder, Skills4Good AI

**Yvonne Zhu** CISA, Partner, Canadian Responsible AI Leader, EY Canada

#### Speaker

**Bryant Ramdoo** CPA, CA, National Audit and Assurance Innovation Leader, KPMG Canada

#### Speaker

**Vishal Gossain** Partner, Risk Analytics and Balance Sheet Management Leader, EY Canada

#### Moderator

**Shirley Lin** CPA, Audit Senior Manager, TMT Audit Practice AI Lead, KPMG Canada

## Guest Speakers



### Allen Yao

Allen is a Partner and Senior Vice President with EY's Strategy and Transactions practice, bringing over 16 years of experience in corporate restructuring, distressed M&A and financial advisory. Allen has provided strategic advice to management, lenders, bondholders and investors in distressed situations, helping them navigate complex financial and operational challenges. Allen has been serving on the board of CCPAA since 2020.



### Carmen Jacques

Carmen Jacques, CPA, CGA, is a Student Recruitment Officer with the Chartered Professional Accountants of Ontario. In addition to her CPA designation, Carmen also holds a Bachelor of Commerce degree from Sydenham College, University of Mumbai. A skilled accountant with a wealth of experience in Canada and abroad, she offers exceptional knowledge and expertise in helping new Canadians. Carmen personifies the values of CPA Ontario and is an invaluable resource when communicating the career benefits and opportunities offered by a CPA designation. She is a member of several advisory committees such as the IEP Conference, York University IEP Bridging Program, Halton Newcomer Strategy, etc. Carmen holds a certificate in Leadership and Inclusion from Centennial College and is a committed member of CPA Ontario's EDI Working Group.



### Marjan Alirezaie

Marjan Alirezaie is the Director of Artificial Intelligence at Flybits, overseeing the strategic implementation of AI technologies to enhance personalization and leverage generative AI. Before moving to Canada, she served as an assistant professor at the Center for Applied Autonomous Sensor Systems (AASS) at Örebro University, Sweden, where she earned her PhD in Computer Science in 2015, focusing on semantic perception. With over 15 years of experience in R&D, Marjan's interests include machine learning, knowledge representation, reasoning, and advancing neuro-symbolic (NeSy) models in sensory systems and robotics.



### Josephine Yam

Josephine Yam is an AI lawyer, AI ethicist, and CEO and Co-Founder of Skills4Good AI, Canada's leading platform for Responsible AI literacy. A sought-after speaker, she delivered Canada's first TEDx talk on Responsible AI and gives keynote addresses across the US and Canada. Named one of the Top 100 Brilliant Women in AI Ethics, Josephine holds a Master's in Law and a Master's in AI Ethics, and is a graduate of Stanford's Executive Program. Through Skills4Good's AI Academy platform, she empowers non-tech professionals to tackle AI's ethical challenges and advance their careers. Recognized with the RBC Top 25 Canadian Immigrant Award, she champions equity, diversity, and inclusion in AI, advocating for a human-centered AI world where AI is used for good.



### Yvonne Zhu

Backed by over 18 years of experience in risk management and IT auditing, Yvonne specializes in AI governance, risk and controls management and AI assurance since 2018. Believing in AI's potential for good, she is deeply committed to assisting organizations implement AI in an ethical and responsible manner. As EY's Canadian Responsible AI Leader, and Global Assurance AI client services workgroup, she plays a pivotal role in the development of the EY Responsible AI Framework, AI principles, and the AI Assurance Framework. Yvonne is actively engaged in discussions regarding AI compliance, attestation, and assurance frameworks. She collaborates closely with the Standards Council of Canada, the Responsible AI Institute, ISACA and other industry committees, NGO organizations to offer her insights on industry regulations and AI governance approach.



### **Bryant Ramdoo**

Bryant is a Partner in KPMG’s Consumer and Industrial Market Audit practice in Toronto, Canada. He has over 17 years of experience providing financial statement audits, audits of internal control, and accounting advisory services. Bryant is also the National Audit and Assurance Innovation leader for KPMG in Canada, driving change by leveraging emerging technologies and upskilling our people to transform the audit experience for our professionals and our clients. Bryant has provided professional audit services to several large multinational groups in accordance with Canadian Auditing Standards, PCAOB requirements, IFRS, and U.S. GAAP. His audit experience ranges from securities filings in both Canada and the United States, carve-out financial statements, bankruptcy filings, IPO filings and pension plans audits to the successful coordination of large global audit transitions.



### **Vishal Gossain**

With over 20 years of experience across Canada, the US, and Latin America, Vishal leads a team at EY focused on AI applications, lifecycle models, risk strategy, regulatory model development, risk appetite, policies, and ESG risk. Before joining EY, he was Vice President of Global Risk Management at Scotiabank, where he developed lending, retail regulatory, and money laundering models. Vishal also led credit risk at HSBC in Latin America and Capital One Canada, holding risk management roles at both institutions in the US. He serves on the board of MIT’s Machine Learning Applications program and represented Scotiabank in AI initiatives at UC Berkeley and Vector.AI. Vishal holds a Bachelor of Technology from the Indian Institute of Technology in Kharagpur and a Master’s in Engineering from the University of Texas in Austin.

## **Moderator Introduction**



### **Shirley Lin**

Shirley Lin, CPA, is the Audit Practice AI Champion at KPMG, specializing in integrating AI into auditing. She holds a degree from the University of Toronto’s Rotman Commerce and a master’s in digital analytics from Simon Fraser University, sponsored by KPMG. With over 8 years of experience, she is recognized as a digital leader in the Greater Toronto Area. Shirley began her career at Grant Thornton and now audits clients at KPMG. Beyond her professional role, she serves as Chair of the Audit Committee for a not-for-profit organization, where she advocates for integrity and transparency in financial oversight and governance.

## **MC Introductions**



### **Andy Ma**

Kaiyuan (Andy) Ma recently graduated from Western University with an accounting degree and is currently working as a Finance trainee at Siemens Canada. He gained valuable experience during co-op placements at PwC and Canadian Tire, where he honed his analytical and financial skills. In addition to his professional development, Andy is also an active volunteer with the CCPAA, which joined in 2021.



### **Gabriella Lu**

Gabriella is a finance and accounting professional with a strong investment analysis and risk management background. She currently works at RBC Commercial Banking, specializing in the Real Estate and Construction industry, where she focuses on various business credit products and provides financial strategic advisory. Previously, Gabriella worked at Brookfield Asset Management, where she conducted research and investment analysis, performed valuations, and managed data projects for private credit and structured products. She also gained extensive experience at VISTRA Fund Services and Citco, focusing on fund accounting, performance analysis, and process automation. Gabriella holds a Master of Finance from Queens University and a Bachelor of Accounting (Honors) from Brock University, where she graduated with distinctions. She will be continuously pursuing professional development in finance and risk management.



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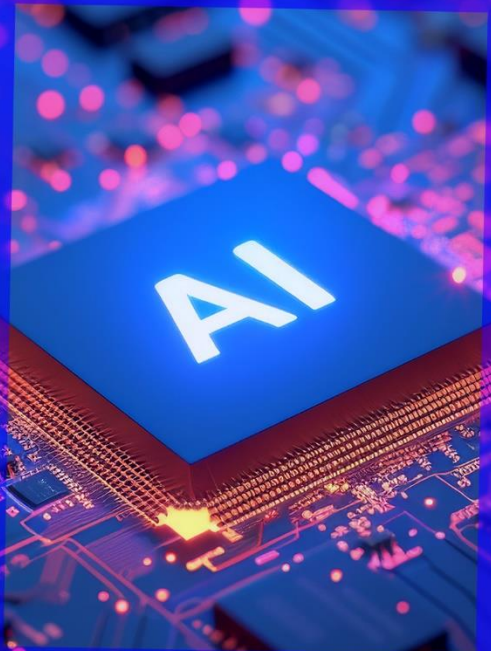


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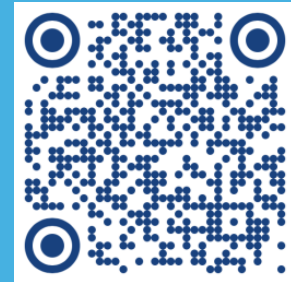
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