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CCPAA-ON Annual Report
2022 – 2023

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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

CCPAA-ON is an independent and not-for-profit organization of professionals and scholars who are interested in bridging the gaps between Canada and China and work in accounting, auditing and taxation or related areas in various public and private sectors including firms, financial institutions, educational institutions, and government agencies.

Mission

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

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



Professional Development



Business Networking



Career Coaching



LETTER FROM THE BOARD



Joe Li
Chair of the Board
of Directors

Dear CCPAA-ON Community,

As we gather here in reflection on the past year, I am struck by the resilience and adaptability that define our community. In the midst of continual change, we have stood firm, demonstrating remarkable progress and unity. The challenges we faced only served to strengthen our resolve, and it is with great pride that I witness the strides our community and dedicated volunteers have made.

Our journey of professional and personal growth has been remarkable. This success can be attributed to the unwavering support of an exceptional Board, a committed President, and the passion of our volunteers. It is also thanks to the generous support of our invaluable sponsors – CPA Ontario, KPMG, KVB Kunlun, Cidel Asset Management, and Bridgewater Law. Their contributions and expertise have been invaluable, breathing life into our professional development events. These events have not only provided enriching insights but have also made a tangible impact on international students and foreign-trained CPAs within our community.

As we look ahead, our steadfast commitment is to provide you with opportunities for growth and connection. While we will continue to host industry-leading professionals to share their insights, we are also determined to foster more in-person interactions. These interactions are the lifeblood of our community, where connections are forged and knowledge is shared. I eagerly anticipate the chance to meet more of you at our upcoming events, particularly at our in-person annual conference on October 29, 2023.

In closing, I extend my heartfelt gratitude to each and every one of you for your support and dedication. Together, we have achieved remarkable heights, and together, we will continue to elevate the Canadian-Chinese Professional Accountants' Association - Ontario Chapter community to even greater peaks.

Warm regards,
Joe Li

LETTER FROM THE PRESIDENT



Mia Ma
President

Dear Members and Friends of CCPAA-ON,

With immense pride and gratitude, I address you today as the President of the Canadian Chinese Professional Accountants Association Ontario Chapter. As we reflect upon the past year and our accomplishments together, I am filled with admiration and appreciation for the remarkable dedication and support of our stakeholders.

First and foremost, I want to express my heartfelt thanks to our dedicated volunteers who have tirelessly committed their time, expertise, and passion to further our mission. I must also extend my gratitude to our esteemed board members for their exceptional leadership and guidance. The CCPAA-ON family would not be what it is without your selfless contributions.

Furthermore, our respected speakers have played a pivotal role in enriching our members' knowledge and understanding of the accounting profession. We are privileged to have had the opportunity to learn from industry leaders and experts who have generously shared their insights and experiences. I also want to express my appreciation to our fellow professional associations for their support and cooperation.

Our sponsors deserve special recognition for their continued support. Your belief in our mission and your financial contributions have played a pivotal role in our ability to provide valuable resources and opportunities to our members.

Our vision for the association is clear – continually building upon our professional platform, and providing our members with the tools and resources they need to excel in their careers. We aspire to create a dynamic and inclusive community that fosters networking, mentorship, and professional growth. To achieve this vision, we will continue to focus on expanding our educational offerings, fostering partnerships with leading organizations, and promoting diversity and inclusion within our profession. By embracing innovation and adapting to the evolving landscape of accounting and finance, we will ensure that CCPAA-ON remains at the forefront of professional excellence.

Thank you for your unwavering commitment to CCPAA-ON, and I eagerly anticipate another year of growth and success as we embark on this incredible journey together.

Sincerely,
Mia Ma

PROFESSIONALISM

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

2022–23 Professional Development Seminars

2022-11-17

Webinar: Excel Formula

Speaker

Sam Laist, CPA, Senior Accountant, Kraft Berger LLP

In this webinar, the speaker introduced a couple of Excel functions and demonstrated hands-on examples using Excel spreadsheets to organize and manage data, such as sorting data using conditional formatting, joining data from different columns, filtering data in columns and fields, and getting familiar with keyboard shortcuts for improved effectiveness and efficiency.

2023-01-31

Webinar: Caseware Introduction

Speaker

Jessica Jin, CPA, CA, MMPA, Senior Manager, Kraft Berger LLP

This webinar provided an introduction to Caseware, a software that is commonly used by small to mid-sized accounting firms for audit, review, compilation, and other engagements. The speaker showcased some basic functions of Caseware, including bookkeeping, making, adjusting, and reclassifying journal entries, generating the trial balance and general ledger, generating letters, checklists, and financial statements using CaseView documents, and organizing and signing off on working papers.

2023-02-23

Webinar: Value Preservation & Turnaround Strategies During Downturn

Speakers

Vincent Le, Associate Partner, EY-Parthenon
Allen Yao, Vice-President, EY-Parthenon

In this webinar, the speakers discussed how businesses could formulate and deploy turnaround and restructuring strategies needed in critical and turbulent situations. They also discussed how to use these strategies in responding to an uncertain environment and planning to preserve and optimize companies' capital position and operational resiliency.

2023-03-30

Webinar: Data Management and Automation

Speaker

Dmitry Gudkov, Founder, EasyMorph

In this webinar, the speaker demonstrated how to automate data preparation using EasyMorph, a visual no-code data preparation and automation tool. It could minimize tedious data-wrangling, reduce calculation errors, and enhance productivity in day-to-day work for controllers, financial analysts, and accountants.

2023-05-04

Webinar: Due Diligence

Speaker

Tina Liu, Senior Counsel, Bennett Jones LLP

In this webinar, the speaker demonstrated how to conduct legal due diligence with a focus on reviewing material contracts and provided a considerable number of examples and simulations.

2023-05-30

Webinar: Supplies to Non-Residents – GST/HST and Customs Considerations

Speakers

Dianne Bomben, Partner, Indirect Tax, KPMG
Kenn Jordan, Partner, Trade and Customs, KPMG
Lara Theron, Senior Manager, Indirect Tax, KPMG

In this webinar, the speakers discussed some of the new GST/HST rules for non-resident vendors and platform operators, effective July 1, 2021. The speakers also reviewed the GST/HST considerations for businesses in Canada that provide goods and services to non-residents, and some key customs considerations for Canadian businesses that import and/or export merchandise.

2023-06-29

Webinar: Tax Structuring of Private Equity Acquisitions

Speakers

Michelle Zhang, Partner, International Tax Services, Deloitte
Winnie Wang, Manager, International Tax Services, Deloitte

The speakers provided a high-level introductory session about the tax structuring of private equity ("PE") acquisitions. Topics included what a typical PE structure looks like and key tax considerations related to the structuring of acquisitions by PE.



2023-07-11

Webinar: Estate Planning

Speakers

Aiden Batist, Associate Investment Counsellor, Cidel Asset Management
Megan Duncan, Assistant Vice President, Cidel Trust Company

This webinar introduced trusts, focusing on how they are commonly used in wealth and estate planning. The speakers provided an overview of the main types of domestic and non-resident trusts and discussed how these are used for both Canadian and international families as part of their wealth plan.

2023-08-17

IFRS 17

Speakers

Ian Blackie, Senior Manager, Actuarial Business Consulting, EY

The implementation of IFRS 17 for insurance companies causes a major change to the accounting principles used for the preparation of insurance entities' financial statements. In this presentation, the speaker provided an introduction to IFRS 17, covering the overall IFRS 17 technical refresher, measurement of liability for remaining coverage, discounting under IFRS 17, measurement of CSM/LC, and reinsurance held.

2023-09-30

Market Veteran's Perspective on What Lies Ahead

Speaker

Philip Young, CFA, Portfolio Manager, Cidel Asset Management Inc.

This seminar featured insights from a market veteran, who has navigated the highs and lows of the financial world for decades. The speaker gave a unique perspective on the current state of the market and what the future holds. The presentation included reflection on 2023, highlights of the year's noteworthy events, followed by long-term trends that are posed to exert a sustained influence on the markets, and key indicators to monitor as we approach 2024.

ENVIRONMENTAL, SOCIAL, AND CORPORATE GOVERNANCE

Change remains the only constant in life, and the CCPAA-ON has wholeheartedly embraced this philosophy, consistently evolving to better serve its audience and members. As we stepped into the year 2023, following three years of pandemic challenges, we witnessed a gradual return to normalcy. The hybrid work model has emerged as the prevailing work-life style in the market, reflecting our adaptability and resilience. Nonetheless, individuals have been grappling with the challenges posed by high inflation and have been adjusting to the prevailing high-interest-rate environment, which continues to exert significant economic pressure.

In the fiscal year 2022-2023, CCPAA had the honor of hosting seasoned industry professionals who delivered insightful speeches to our members and non-members. These presentations covered a wide array of topics, including data management, updates on IFRS guidelines, work-related tools such as Excel, leadership, estate planning, tax structures for private equity funds, and GST/HST and customs considerations.

Notably, CCPAA-ON achieved a resounding success by virtually organizing the 14th Annual Conference in October 2022. This conference was designed to foster an expanded dialogue around the crucial theme of Environment, Social, and Governance (ESG). It brought together industry professionals for a deep dive into ESG research, sustainability, and emerging topics, facilitating a profound exchange of ideas. Furthermore, CCPAA-ON collaborated with CPAC Enlight to host the CPA Career Development Conference, which garnered excellent feedback from participants and proved to be a valuable event in advancing career development for our attendees.

The high-interest financial market conditions have significantly altered the landscape in which businesses operate, presenting both economic and societal challenges. To remain relevant and thrive, businesses now need to embrace a fresh set of strategic frameworks that enable them to evolve and adapt effectively in this economically stressed environment, with the anticipation of a potential future recession. Professionals across various sectors are uniting with a common goal: achieving a soft landing amidst these changes. The field of Mergers and Acquisitions (M&A) is also undergoing a transformation due to these evolving market conditions. CCPAA-ON, along with other industry leaders, seized this opportunity to share their insights and distill their collective experiences in the M&A industry during our 2023 annual conference.

Working 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 and provided tips for future CPAs to succeed in their career.

Young professionals, join us in fostering growth and success.

Here at CCPAA-ON, everyone can be successful. We provide bountiful resources to help students and new professionals to achieve their goals.

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.

CPA Career Day

2023-03-25

Unlock Your Potential as a Chartered Professional Accountant

Keynote Speaker

Rachel Xue, CPA, CA, FRM, VP Finance, Flybits

Panelists

Tamara Dwarika, CPA, CFE, CISA, CIA, Manager, Toronto Hydro

Roman Cherkashyn, CPA, Director, Scotiabank

Zishan Zhao, CPA, Manager, Grant Thornton

Yibo Sun, Tax Manager, KGHM International

This in-person event connected newcomers with experienced accounting professionals and provided opportunities to obtain insights and learn about the CPA profession. The event allowed them to explore different career paths and available options, as well as network with peers sharing similar backgrounds who were interested in pursuing a career in accounting.



We help you get there!

CPA CFE Exam Preparation Workshop
CPA PERT Workshop



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 fun! Volunteers will have the opportunity to rotate in all committees, including Professional Development, Business Development, Communication, Public Relations, and Membership.

By joining the Volunteer Rotation Program, volunteers will develop a cross-functional network, have a deeper understanding of the routine work of the CCPAA-ON Operation Committees, 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!

Leadership Communication

2023-08-26

Speaker

Peter Chien, Entrepreneur, Co-founder, YourTable

In this in-person leadership seminar, the speaker demonstrated core elements that are commonly recognized for effective leadership, and skills – such as storytelling, influence, and persuasion, that inspire and motivate individuals or groups to achieve a shared vision or goal.

Career Development

2023-09-16

Speaker

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

In this career development seminar, the speaker reflected on her career journey, in which she navigated language and cultural challenges to establish herself in Canada's financial sector. Moreover, she shared valuable lessons learned from both successes and setbacks, and offered practical advice on excelling in interviews, navigating career transitions, and seeking advancement.

Joint Events with Community Professional Associations

2023-05-04

Professional Career Development Forum and Virtual Job Fair

Organized by CCAA, CCEA and CPAC, co-organized by CCPAA-ON and other associations, this event was to support university students, recent graduates and newcomer professionals for co-op, early career and career development opportunities.

2023-05-06

CPAC Enlight's Ignite your Career: A Conference for Aspiring 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 showcased different potential careers and opportunities with a CPA designation.

Professional Collaboration with CPA Ontario

CPA Ontario Own Your Future Career and Job Fair

2023-02-15

Diversify outreach and build a talent pipeline of highly skilled, internationally educated professionals; Showcase a variety of opportunities and raise awareness of non-traditional CPA roles and niche areas.



NETWORKING

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

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

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Senior Accountant, Kraft Berger LLP

2023-01-31 Caseware Introduction

Jessica Jin CPA, CA, MMPA
Senior Manager, Kraft Berger LLP

2023-02-23 Value Preservation & Turnaround Strategies During Downturn

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Associate Partner, EY-Parthenon

Allen Yao
Vice-President, EY-Parthenon

2023-03-25 Unlock Your Potential as a Chartered Professional Accountant: CPA Career Day

Keynote

Rachel Xue CPA, CA, FRM
VP Finance, Flybits

CPA Representative

Robin Clarke
Student Recruiter, CPA Ontario

Panelists

Tamara Dwarika CPA, CFE, CISA, CIA
Manager, Toronto Hydro

Roman Cherkashyn CPA
Director, Scotiabank

Zishan Zhao CPA
Manager, Grant Thornton

Yibo Sun
Tax Manager, KGHM International

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Keynote

Mei Long CPA
Senior Director, CIBC

Panelists

Jason Yi CPA
Senior Manager, KPMG

Jessica Jin CPA, CA, MMPA
Senior Manager, Kraft Berger LLP

Jenny Peng CPA
Finance and Business Solutions Manager, People Corporation

2023-05-30 Supplies to Non-Residents – GST/HST and Customs Considerations

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Kenn Jordan
Partner, Trade and Customs, KPMG

Lara Theron
Senior Manager, Indirect Tax, KPMG

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Winnie Wang
Manager, International Tax Services, Deloitte

2023-07-11 Estate Planning

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Philip Young CFA
Portfolio Manager, Cidel Asset Management Inc.

Kam Gan

Effy Gong

Jessica Jin

Marco Li

Phyllis Li

Linda Liu

Cindy Liu

Gabriella Lu

Andy Ma

Mia Ma

Lynn Qiao

Moby Sun

Dongsheng Wang

Julian Wu

Lei Wu

Rosie Wu

Nico Yuan

Grace Zhang

Pennie Zhao

THANK YOU TO ALL OF OUR VOLUNTEERS!

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.



<https://ccpaa.ca/volunteers/>



Joe Li
Chair of Board of
Director



David Cao
Board Member



Shaoyang Fang
Board Member



Tina Liu
Board Member



Grace Wang
Board Member



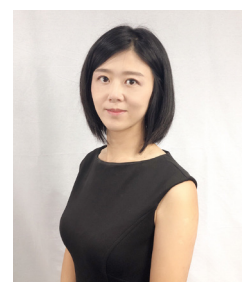
Rachel Xue
Board Member



Allen Yao
Board Member



Michelle Zhang
Board Member



Lei Wu
Board Secretary



Pennie Zhao
Treasury

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.



Mia Ma
President and
Board Member



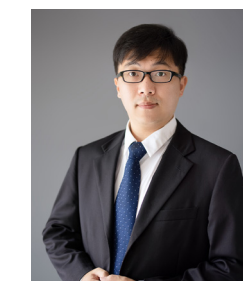
Jessica Jin
VP, Professional
Development



Linda Liu
VP, Membership



Moby Sun
VP, Communication/
Public Relations



Dongsheng Wang
VP, Business
Development



Zizheng (Kam) Gan
Co-Director,
Professional
Development



Gabriella Lu
Co-Director,
Professional
Development



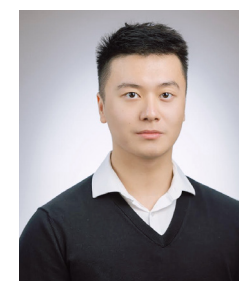
Lynn Qiao
Director,
Membership



Cindy Liu
Co-Director,
Communication



Grace Zhang
Co-Director,
Communication



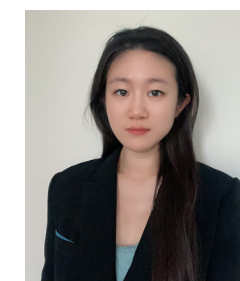
Julian Wu
Director, Business
Development



Effy Gong
Event Specialist



Marco Li
Event Specialist



Phyllis Li
Event Specialist



Andy Ma
Event Specialist



Rosie Wu
Event Specialist



Nico Yuan
Event Specialist

Deal Flow: Navigating Merger and Acquisition Transactions

Mergers and acquisitions ("M&A") refer to consolidating companies or their major businesses through financial transactions between companies. In 2020 and 2021, the M&A landscape witnessed a considerable uptick due to cheaper financing and lower interest rates. In the latter half of 2022 and the beginning of 2023, M&A activities decreased due to market volatility and uncertainties such as the war in Ukraine, supply chain disruption, and other geopolitical tensions. Despite the initial downturn, deal volumes are expected to rebound quickly in 2023 as a result of the global economic recovery and disruptions in the financial service industries, such as the collapse of Silicon Valley Bank (SVB), US Operations acquired by First Citizen, and sale of Credit Suisse to UBS.

CCPAA-ON's 15th Annual Conference, "Deal Flow: Navigating Merger and Acquisition Transactions," aims to delve into the intricate landscape of mergers and acquisitions, exploring the underlying dynamics, challenges, and opportunities that arise within this realm of corporate strategy.

With the current global business environment witnessing an unprecedented wave of M&A activities, this conference intends to foster an engaging platform for practitioners and thought leaders to share valuable insights, exchange knowledge, and shape the future direction of the M&A landscape.

Agenda

- 09:00 – 10:00** Breakfast, Registration & Networking
- 10:00 – 10:05** Conference Introduction
- 10:05 – 10:15** Opening Remark from CCPAA-ON
- 10:15 – 10:25** Remark from CPA Ontario
- 10:25 – 10:30** Sponsor Appreciation
- 10:30 – 11:15** **M&A Market Overview**
- Current macro environment & market conditions
 - M&A activity recap and outlook
 - Implications for sellers and buyers
- 11:15 – 12:00** **Legal issues**
- Legal issues, including legal due diligence, key transaction documents, public vs. private transactions, closing conditions (including regulatory considerations).
- 12:00 – 13:00** Lunch & Networking
- 13:00 – 14:10** **Accounting and Tax Issues**
- Financial reporting, accounting and tax considerations in the life cycle of a transaction.
- 14:10 – 14:55** **M&A from Investors' View**
- Current M&A and sector trends and its implication on business valuation
 - Hot topics in M&A and potential future trends
- 14:55 – 15:10** Coffee Break & Networking
- 15:10 – 16:00** **Panel Discussion**
- Panelists**
- Stephen Ng** Managing Director, Crosbie & Company
- Tina Liu** Counsel, Bennett Jones LLP
- Jessica Zhang** CPA, Senior Manager, Accounting Advisory Services, KPMG
- Bryan Lam** CPA, Manager, Valuation, Modelling & Economics, EY

Speaker

Joe Li Tax Partner, KPMG LLP

Speaker

Stephen Ng Managing Director, Crosbie & Company

Speaker

Matthew Hunt Partner, Bennett Jones LLP

Speakers

Jessica Zhang CPA, Senior Manager, Accounting Advisory Services, KPMG

Shaka Raina CPA, Senior Manager, M&A Tax, KPMG

Speakers

Elaine Liu CFA, Manager, Valuation, Modelling & Economics, EY

Bryan Lam CPA, Manager, Valuation, Modelling & Economics, EY

Guest Speakers



Joe Li

Tax Partner, KPMG LLP

Joe is a Tax Partner with KPMG LLP, based in Toronto, Canada. With over 15 years of tax experience, he is a trusted advisor and is focused on key tax issues faced by his clients in a range of industries.

He has extensive experience with providing Canadian tax compliance, tax accounting, and tax planning services to large multinational companies and regional companies, including public companies, private companies and not-for-profit organizations. Additionally, Joe leads the KPMG Rewards Practices in the Greater Toronto Area.



Stephen Ng

Managing Director,
Crosbie & Company

Stephen is a Managing Director at Crosbie responsible for originating and leading M&A, financing, and other advisory mandates for public and private companies and institutional investors across various industries.

Stephen has over 20 years of global investment banking, private equity, and corporate development experience. He also has extensive M&A and capital markets experience in New York, Hong Kong, and Toronto with Credit Suisse, Lehman Brothers, and CIBC Capital Markets.

Stephen has operating experience in C-suite roles building a small-cap company and leading acquisitions for a large public company.



Matthew Hunt

Partner, Bennett Jones
LLP

Matt Hunt provides advice to boards of directors and special committees on public and private M&A mandates and has advised on capital markets transactions involving all levels of the capital structure. Matt has acted for general partners and other private equity sponsors in management and leveraged buy-outs as well as numerous Private Investment in Public Equity (PIPE) transactions. He also has significant experience advising multinational companies on complex corporate reorganizations.

Matt has represented clients across a spectrum of industries, including established industries such as mining, aviation, manufacturing/industrial, waste management, technology, and healthcare. He has also advised clients in emerging growth industries such as gaming, cannabis, psychedelics, and cryptocurrency.

Matt joined the firm after several years at another leading Canadian law firm. His career includes engagements in the legal department of a major Canadian financial institution and at a prominent international trade law firm in Washington, DC.



Tina Liu

Counsel, Bennett Jones
LLP

Tina Liu is a senior counsel with Bennett Jones LLP, a top tier full service business law firm in Canada. Tina has a corporate and securities law practice with a focus on cross-border investment and financing transactions. Her transactional experience includes mergers and acquisitions, corporate finance, Capital Pool Company Qualifying Transactions, joint ventures, reorganizations and restructurings. Tina also advises clients on a broad range of corporate commercial law issues, including structuring and organizing start-up operations, directors' and shareholders' meetings, corporate governance, and the duties and obligations of directors. She has worked extensively with Chinese companies in connection with their Canadian investments and acquisitions.

Tina acts for clients in a wide range of industries, particularly in the natural resources industry. Before working in North America, she was a senior lawyer with the Ministry of Land and Resources of the People's Republic of China. Tina currently sits on the board of CCPAA Ontario Chapter.

Tina was the WeWorkingWomen (<https://weworkingwomen.com/>) 2022 Grand Impact Awards – Top Women Executive Award winner.

Guest Speakers



Jessica is a Senior Manager in the Accounting Advisory Services practice at KPMG with extensive experience assisting finance teams in both U.S. and Canada through pre and post deal financial reporting.

Jessica Zhang

CPA, Senior Manager,
Accounting Advisory
Services, KPMG



Shaka is a Senior Manager in the M&A Tax Practice at KPMG. Shaka has expertise in performing tax due diligence, structuring, and modelling for Canadian and US private equity and pension fund clients across various industries.

Shaka Raina

CPA, Senior Manager,
M&A Tax, KPMG



Elaine is a Manager in the Toronto Valuation Group within EY with over 5 years of professional experience in providing valuation advisory services for a variety of industries, including technology, life sciences, financial services and consumer products & retail.

She has managed valuation engagement for a variety of purposes including M&A deal support, financial reporting, litigation valuation, tax planning, and strategic advisory. She is responsible for the end-to-end planning, execution, and delivery of valuation engagements.

She has significant experience in developing project plans, budget and timelines for engagements, liaising with company management and key business functions leaders, developing and maintaining complex financial models, and presenting valuation results to clients.

She has robust experience in performing enterprise valuations, purchase price allocations, impairment tests, tangible and intangible valuations (including inventory, trademark, technology know-how, customer relationships, etc.), and common stock valuations in various valuation engagements.

Clients have included: Clairvest Group Inc, Canadian Imperial Bank of Commerce, Manulife Financial Corporation, Pet Value Holdings Ltd., Converge Technology Solutions Corp., ECN Capital Corp., Home Capital Group Inc., and DentalCorp Holdings Limited.

Elaine Liu

CFA, Manager,
Valuation, Modelling &
Economics, EY



Bryan is a Manager in EY's Valuation, Modelling & Economics Practice and has worked with clients in Canada and around the world.

He provides valuation advisory services across a range of industries, including wealth & asset management, technology, and manufacturing.

He began his career in EY's Assurance Practice, where he served wealth and asset management clients such as hedge funds, private equity funds, and mutual funds. Through this experience, he gained an in-depth understanding of his clients' businesses, portfolio companies, and market dynamics, which he has carried over into his current role.

Currently, he manages and executes valuation mandates for clients, covering matters such as financial reporting and transactions.

Selected client experience: CI Financial, Clairvest Equity Partners, Colliers International Group, OMERS, and Overbay Capital Partners

Bryan Lam

CPA, Manager,
Valuation, Modelling &
Economics, EY

Moderator Introduction



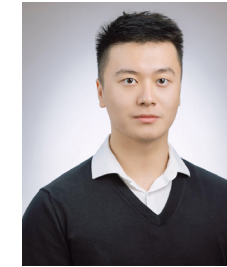
Cindy Liu is a Senior Consultant at KPMG Toronto in the Operations Mergers and Acquisitions group, specializing in integrations and separations. She recently joined this role to learn more about the operations of companies and how they should best operate as they undergo mergers, acquisitions, and carve-outs.

Prior to this role, she was a Senior Accountant/Consultant with the Private Enterprise audit practice in the same company, specializing in the audit of non-listed companies, not-for-profit organizations, and municipalities. Having been in the group for four years full time and for a total of 16 months as a co-op student, she has worked in various industries spanning from manufacturing to real estate, and in standards spanning from IFRS to PSAB.

Cindy Liu

Senior Consultant,
KPMG Toronto

MC Introductions



Julian is a Senior Consultant in the Accounting and Reporting Advisory group at Deloitte where he specializes in securities regulation, capital market offerings, and transaction services, including transactions relating to mergers and acquisitions, IPOs, and carve-outs focused on a wide range of industries.

Prior to joining Deloitte, Julian worked as a Cost Analyst at Gordon Food Service, where he assisted the Western Canada divisions with cost and operations optimization, month-end reporting, and developing budgets and forecasts.

He has 4 years of experience providing Advisory and Assurance services, working with public and private companies under IFRS, ASPE, and US GAAP.

Julian Wu

Senior Consultant,
Accounting and
Reporting Advisory
Group, Deloitte



Rosie Wu is a Senior Accountant/Consultant at KPMG Toronto, specializing in audits of public and non-public companies within the retail and manufacturing industries. She is knowledgeable about IFRS, ASPE, and US GAAP reporting frameworks, and experienced with PCAOB, ISA, and US GAAS audit standards.

Prior to joining KPMG, Rosie worked as an Intern in Financial Reporting and Corporate Accounting at Canadian Natural Resources Limited (CNRL), where she recorded transactions, monitored and reconciled selected balance sheet and income statement accounts, and assisted the team in ensuring effective monthly and quarterly reporting.

Rosie Wu

Senior Accountant/
Consultant,
KPMG Toronto

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