

STRENGTHEN & ENRICH

CCPAA-ON
Annual Report
2022



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

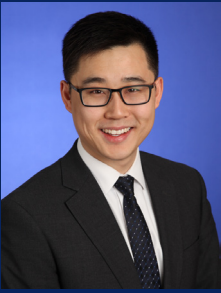
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<https://ccpaa.ca/>

DEDICATION PROFESSIONAL INTERGRITY



LETTER FROM THE BOARD

CCPAA-ON Joe Li

Dear CCPAA-ON Community,

As I think back to year and reflect upon all that has transpired, I think the past year has been a year of continual change and adaptation for many of us. As communities and social events return in person, I am proud of the stride that our community and volunteers continue to make. There is much to look forward to in the coming year and I cannot wait to have the opportunity to share some of those moments to come with the community.

Professional and Personal Growth

I am so delighted to have the support of a remarkable Board, a fierce President and dedicated volunteers. We are thankful to have received support from industry-leading organizations, such as KPMG, EY, Grant Thornton, CIBC, KVB Kunlun, Cidel Asset Management, and WealthOne for insights shared at our professional development events. We are also delighted for the continual support provided by CPA Ontario in our career coaching program to assist international students and foreign-trained CPAs, which have made tangible impact in the community as we continue to adapt. Special thank you to Maggie Liu and Mavis Mu, two departing board members who have contributed so much to the CCPAA-ON communities in the many roles they have held. Both Maggie and Mavis are instrumental in shaping CCPAA-ON into the organization that we all know and love today.

Stay Tuned

Over the coming year, while we will continue to bring industry leading professionals to share their insights and perspectives, we will thrive to provide the community more opportunities for meaningful in-person interactions. I look forward to meeting more of you at our events!

Yours very truly,
Joe Li



LETTER FROM THE BOARD

CCPAA-ON Maggie Liu

Dear CCPAA members,

It is with immense gratitude and pleasure that I write this letter to advise you of my retirement as Vice-Chair of the CCPAA Board of Directors.

Over the past 15 years it has been an honor and a privilege to be part of the CCPAA. My time with CCPAA began in 2008 and over the course of my tenure I have had the opportunity to advance in many ways, both personally and professionally. The time spent here has truly been a wonderful experience working alongside many dedicated people.

Starting as a seminar volunteer and working my way up to Vice-Chair of the Board of Directors gave me many opportunities, including working alongside a great group of people towards one common goal as a team, the success of CCPAA. During this time, I was able to enhance my organizational, communication and leadership skills which have been an asset in my professional career. I made many friendships over the years, which I will treasure.

As I retire from the CCPAA to enter the next phase in my life, I am proud of all that has been accomplished over the years, including a platform to provide education, networking and friendships to all members. I wish each member of the organization and the incredible team continued success. Continue to move forward in great strides for one common goal - the success of CCPAA.

Thank you,
Maggie Liu

Canadian-Chinese Professional Accountants Association

Ontario Chapter
NPO Since 2008

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 the related areas in various public and private sectors including firms, financial institutions, educational institutions, government agencies, etc.



MISSION

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

OBJECTIVES

1. To facilitate career and professional development of members in 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 system in both Canada and China.

GOALS

- CCPAA-ON encourages members to develop their career path 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 the accounting and related industries.
- CCPAA-ON welcomes opportunities such as joint research projects, education programs, publications in accounting, auditing, finance, taxation or the related areas.

PROFESSIONALISM

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

2021–22 Professional Development Seminars

September 22, 2021

GST/HST New Non-Resident Registration Requirements

Speaker

Christina Zurowski, CPA, CA, Partner, Commodity (Sales) Tax, Grant Thornton LLP

In this webinar, we reviewed new registration requirements, who is impacted, how to comply and what are the obligations once registered. Also highlighted were the challenges we had seen to date that organizations are facing under these new simplified GST/HST registration provisions. The speaker provided a summary of the general GST/HST registration requirements to help the audience obtain a complete understanding of the obligations for non-residents and how it impacts your business.

November 11, 2021

Working with Data and Data Ethics: Protection and Cyber Security

Speaker

Chris Walker, Senior Manager, Forensic Technology, KPMG

In modern business, innovation and decision-making are profoundly influenced by the collection and analysis of data in every aspect. Enterprises are facing challenges and ethical issues in data privacy and security. In this webinar, we explored the consequences of inappropriate data usage and threats to data security. We discussed the causes of data breaches and the implications of cyber attacks. The speaker also walked us through practical methods and knowledge to help us gain an understanding of the role of accountants in protecting data as a valuable asset and ensuring data integrity and security.

December 9, 2021

Blockchain Payment & Open DeFi

Speakers

Steven Kim, MBA, CIM, CFP, PFP, TEP, FCSI, Chief Operating Officer, Blockchain Venture Capital Inc.
Bobby Wang, Counsel, Business Law Group, KPMG
Matt McGuire, MAcc, FCPA, FCA, CFF, DIFA, CCI, AMLP, CAMS, Practice Leader, The AML Shop
Zahra Admani, CPA, CA, Senior Manager, Assurance and Advisory, NVS professional Corporation

Sponsored by KVB Kunlun, this webinar provided an overview on the trending topics surrounding recent developments in financial technology, Blockchain Payment & Open DeFi. Decentralized Finance is a means to reduce the control and



influence of centralized institutes and politics over money and financial products. It is a peer-to-peer global financial system that operates on smart contracts and computer codes rather than relying on middlemen or third parties. In recent times, the decentralized financial system has exhibited rapid growth. Participants were introduced to the topic from different aspects, including general introduction, legal, forensic and audit.

December 16, 2021

Excel VBA Introduction - Session One

April 4, 2022

Excel VBA Introduction - Task Automation

Speaker

Fredrick Zhou, Manager, TD Wealth Operations

The first session provided an introduction to VBA through basic concepts and use cases of the application for people with limited programming knowledge. With the correct mindset and understanding of the benefits of VBA, anyone can start coding. Participants also enjoyed a live tutorial on how to write a simple script to automate a task using various data types, loops, methods, and objects.

In the second session, the speaker introduced various data types, syntax and common debugging methodology. Easy and replicable codes were provided to allow participants to do hands-on practice. Participants also explored functions to enhance productivity, such as interacting with multiple spreadsheets and using VBA to send emails and attached files automatically.

January 27, 2022

CSRS 4200 Introduction

Speaker

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

The new standard updates and strengthens the requirements and guidance for accepting, conducting, and reporting on compilation engagements. This webinar was to raise awareness of the new compilation standard and discuss the main changes and expectations from your external accounting services providers.

February 10, 2022

Professional Ethics, Fraud, and Bribery and Corruption

Speakers

Rebecca Ip, CPA, CA, CFF, CAMS-Audit, Partner, KPMG Forensic, Financial Crimes

Jason Thalla-Joel, CPA, CA, Manager, KPMG Forensic, Disputes & Investigations

Veronica Fedorovich, CPA, Manager, KPMG Forensic, Disputes & Investigations

Ethical decision-making occurs throughout one's professional career. It can be challenging to manage given various pressures and incentives in today's fast-paced business environment. In this session, the forensic team from KPMG explained the frameworks of moral principles, and demonstrated tools and methods for ethical decision making. Cases of organizations facing fraud, bribery and corruption, regulatory non-compliance, and other misconducts were also presented at this webinar.

May 12, 2022

Capital Markets in the Inflationary Era

Speaker

Vianne Xu, CFA, MBA, Wealth Consultant, Cidel

In an inflationary environment, unevenly rising prices inevitably reduce the purchasing power of some consumers, and this erosion of real income is the single biggest cost of inflation. The negative effects of inflation are easy to see. The loss of real income – for those on fixed incomes is particularly pronounced. Moreover, because people need to hold some wealth in money for transactions and unforeseen expenditures, inflation ultimately acts to diminish this portion of wealth until wages increase. To understand how we can better preserve our wealth, CCPAA-ON hosted a webinar to discuss the mechanism of macroeconomics and capital markets.

May 26, 2022

Long-Term Incentive Planning

Speakers

Jennifer Powell, Sr. Manager, Global Mobility Services, KPMG
Belinda Mendoza, Sr. Manager, Global Mobility Services, KPMG

Share-based incentive compensation plans continue to be in the spotlight, for both companies and the Canada Revenue Agency. Significant changes took effect in 2021 in connection with stock option plans and new pronouncements by the CRA. This session summarized these significant changes and the effect they have on existing plans and provided an overview of

the advantages and disadvantages of various plans that companies may wish to use to aid in long-term growth and the retention of key employees.

June 21, 2022

Excel Pivot Table

Speaker

Pennie Y. Zhao, Senior Analyst, TAO Admin

An Excel Pivot Table is a powerful tool to calculate, summarize, and analyze data that shows comparisons, patterns, and trends in your data. It will save you time by allowing you to quickly translate large amounts of data into a meaningful report. The workshop prepared CCPAA-ON professionals for effectively using the Pivot Table features and maximizing its functions and capabilities.

August 4, 2022

Outlook Tips Workshop

Speaker

Gabriella Lu, Finance professional at Brookfield

Receiving and sending emails using Outlook are almost everyone's daily tasks. CCPAA-ON hosted a webinar to introduce some Outlook tips to help accounting professionals to save time and energy, and be more efficient when using Outlook.

September 21, 2022

HNWI Investment and Tax Planning

Speakers

Patrick Wei, Manager, Domestic Tax Practice, Grant Thornton LLP

Vianne Xu, CFA, MBA, Wealth Consultant, Cidel

This webinar discussed common tax planning opportunities for business owners and their families, including estate planning opportunities, personal planning opportunities, and corporate planning opportunities. The other topic discussed was the use of trust in wealth planning, including tax planning, estate planning, and succession planning, as well as illustrating how a wealth management company provides solutions to ultra-high net worth families.



Young professionals, we welcome you to grow with us!

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

In order to help everyone better understand and prepare for the CFE exam, CCPAA-ON invited 2020 successful candidates to share their experiences and tips on passing the CFE exam. The three speakers were from different backgrounds (working full time and full-time study) and picked different roles (tax, assurance, and performance management), students with different situations were able to obtain useful advice from them.

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



We Help You Get There!

CPA CFE Exam Preparation

CPA PERT

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.



Alumni Experience Sharing – Words of Wisdom

In 2021, CCPAA-ON supported students to take bold steps for the future of their profession during the COVID-19 pandemic. We strive to help students adapt to disruption in the job market and thrive far into the future. In online seminars, we invited experienced professionals to share their insights on the critical trends in industries and labor market and give practical advices. Various topics were covered, including co-op opportunities hunting, networking skills improvement, and job search preparation. We wish all attendees can strengthen themselves during this special time and be more than ready for any upcoming opportunities.

LEADERSHIP

We come together to develop well-rounded leadership skills. No matter if you are a student, new immigrant, a junior or senior professional, we welcome you to be a member of our community.



March 17, 2022

Career Coach: How to Obtain Long-Term Development in Your Career Path?

Speaker

Jade Shi,
Career Coach

In the earlier stage of the career, people usually feel confused when talking about future paths and are not sure which way to choose. They are afraid of picking the wrong option and regretting it in future. Developing a career plan helps us achieve our goals.

Understanding oneself and building up a reasonable long-term plan will help a person to continually work towards their final goals. In this workshop, career coach Jade was invited to discuss how to obtain long-term development in one's career, including key elements to be successful in the career, utilizing one's own advantages to plan, and tips on changing or starting a career.

Volunteer Rotation Program

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

By joining the Volunteer Rotation Program, volunteers will have a cross-functional network, have a deeper understanding of the routine work of 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 to a mentor. We also offer soft skills development workshops exclusively to volunteers to help you enhance your communication, leadership and other important soft skills!



NETWORKING

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

Cidel In-Person Event

Extreme Market Volatilities

In this in-person event, the speaker shared with us her observations and thoughts on what is happening with the economy, and what it means for the future. The economy has been through seemingly never-ending uncertainty since the pandemic began over two years ago. Just a few days ago, the S&P 500 was reported to have had the worst half-year since 1970, more than 50 years ago. This is just the latest in all of the movement since COVID-19 was declared a pandemic. When things seemingly stabilized with the introduction of the vaccines, new variants of the coronavirus cropped up, introducing more uncertainty into the market. As tired as we all may be of the phrase, it certainly feels like we are in unprecedented times.

Joint Event with Sino-American CPAs Association (SACPAA)

Year of the Ox: A Look Back and a Look Ahead, End of 2021 Online Seminar on Tax and Legal

In light of the changes in tax laws and regulations caused by the pandemic, and the ups and downs in the financial situation of individuals, families and businesses, the SACPAA and the IRS hosted an online seminar on the legal aspects of tax life at the end of 2021 on December 4 and 5, co-organized by the CCPAA-ON and other professional associations. The seminar brought together experts in tax law, lawyers and insurance professionals from all over North America to help taxpayers keep an eye on their wallets, while teaching them how to cut costs and enhance their investment concepts and awareness.

Professional Collaboration with CPA Ontario

February 3, 2022

CPA Ontario Own Your Future Career and Job Fair

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

Professional Collaboration with CPA Ontario

June 21, 2022

CPA Ontario Firm Day

Virtually meet with, screen and hire talents from across Ontario and shape the future of the KPMG's workforce; Attract a wide talent pool of candidates from diverse professional backgrounds.



February 21–24, 2022

2022 Professional Career Development Forum and Virtual Job Fair

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

Digital Transformation

Adapting to Grow in Today's
Virtual Workplace

2021 Annual Conference Recap

Change is the only constant in life. CCPAA-ON adopted this philosophy and didn't miss a chance to evolve its way to serve its audience and members. Year 2021 was one like no other, year two of the pandemic not only brought more challenges to the world, but also established a new norm for people's living style. As many were still wondering when's the time to return to office, companies are adopting changes to make business on cloud.

Thanks to the fast evolution of technology such as 5G, business can move from analog to digital. Given so many limitations under the pandemic, digitalization and cloud-based business are no longer an option for companies. In every perspective, the pandemic indeed accelerated this inevitable movement and forced the trend to stay. As many traditional businesses do, finance and accounting industries are also wondering how they can adapt their business and processes to make the most of technology investments.



Embracing this opportunity, CCPAA-ON successfully held the 13th Annual Conference virtually this year, and invited professionals from industries such as technology, finance, accounting, etc., to discuss how the digitalization of work would affect the financial professions. A wide range of topics in the theme of “Digital Transformation” were covered.

Technology has changed the way businesses operate and collaborate. To continue to stay relevant, businesses require a new set of strategic frameworks to evolve and adapt to an online-centric environment. CCPAA-ON and more took this chance to share their view and experience in adopting the new normal during the annual conference.

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

2021.09.22 **GST/HST New Non-Resident Registration Requirements**

Christina Zurowski CPA, CA
Partner, Commodity (Sales) Tax, Grant Thornton LLP

2021.11.11 **Working with Data and Data Ethics: Protection and Cyber Security**

Chris Walker
Senior Manager, Forensic Technology, KPMG

2021.12.09 **Blockchain Payment & Open DeFi**

Steven Kim MBA, CIM, CFP, PFP, TEP, FCSI
Chief Operating Officer, Blockchain Venture Capital Inc.

Bobby Wang
Counsel, Business Law Group, KPMG

Matt McGuire MAcc, FCPA, FCA, CFF, DIFA, CCI, AMLP, CAMS
Practice Leader, The AML Shop

Zahra Admani CPA, CA
Senior Manager, Assurance and Advisory, NVS professional Corporation

2021.12.16 **Webinar: Excel VBA Introduction - Session One**

Fredrick Zhou
Manager, TD Wealth Operations

2022.01.27 **CSRS 4200 Introduction**

Jessica Jin CPA, CA, MMPA
Assurance/Accounting Senior Manager, Kraft Berger LLP

2022.02.10 **Professional Ethics, Fraud, and Bribery and Corruption**

Rebecca Ip CPA, CA, CFF, CAMS-Audit
Partner, KPMG Forensic, Financial Crimes

Jason Thalla-Joel CPA, CA
Manager, KPMG Forensic, Disputes & Investigations

Veronica Fedorovich CPA
Manager, KPMG Forensic, Disputes & Investigations

2022.03.17 **How to Obtain Long-Term Development In Your Career Path?**

Jade Shi
Career Coach, BLC Career Coaching

2022.04.09 **CPA Ontario Career Day**

Keynote:

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

CPA Representative:

Ghada Tajeddine
Student Recruiter, CPA Ontario

Panelists:

Cathy Anania CPA, CGA
Sr. Director of Finance, Miravo Healthcare Inc.

Cecilia Zhao CPA, CA
Manager, Assurance Services, EY

Fannie Cai CPA
Senior Manager, Digital Products Analytics, RBC

Jade Shi
Career Coach, BLC Career Coaching

Mentors:

Grace Wu
Controller, Confra Global Solutions Inc.

Kevin Wang
Senior Risk Manager, Computershare

Dan Yi
Manager of Wholesale Financial Control, Royal Bank of Canada

Ellen Tang
Senior Accountant, Kraft Berger LLP

Zoe Chan
Assurance and Accounting Manager, MNP LLP

Jessica Jin
Assurance/Accounting Senior Manager, Kraft Berger LLP

2022.04.21 **Excel VBA Introduction - Task Automation**

Fredrick Zhou
Manager, TD Wealth Operations

2022.05.12 **Capital Markets in the Inflationary Era**

Vianne Xu CFA, MBA
Wealth Consultant, Cidel

2022.05.26 **Long-term Incentive Planning**

Jennifer Powell CPA, CA, CPA (Illinois)
Senior Manager, Global Mobility Services, KPMG

Belinda Mendoza CPA, CA
Senior Manager, Global Mobility Services, KPMG

2022.06.21 **Excel Pivot Table**

Pennie Y. Zhao
Senior Analyst, TAO Admin

2022.07.16 **Extreme Market Volatilities**

Vianne Xu CFA, MBA
Wealth Consultant, Cidel

2022.08.04 **Outlook Tips Workshop**

Gabriella Lu
Finance professional at Brookfield

2022.09.21 **HNWI Investment and Tax Planning**

Vianne Xu CFA, MBA
Wealth Consultant, Cidel

Patrick Wei
Manager, Dometic Tax Practic, Grant Thornton LLP

CCPAA-ON Board Of Directors



Joe Li
Chair of Board of Director



David Cao
Board Member



Shaoyang Fang
Board Member



Tina Liu
Board Member



Grace Wang
Board Member



Allen Yao
Board Member



Maggie Liu
Board Member
Retires on October 31, 2022



Mavis Mu
Board Member
Retires on October 31, 2022



Michelle Zhang
Board Nominated New
Member
Effective on November 1, 2022



Rachel Xue
Board Nominated New
Member
Effective on November 1, 2022



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.

Committee Members

2021–2022



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



Grace Zhang

Director, Communication



Julian Wu

Director, Business
Development



Marco Li

Event Specialist



Andy Ma

Event Specialist

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.

ENVIRONMENTAL, SOCIAL, AND CORPORATE GOVERNANCE

CCPAA-ON 14th Annual Virtual Conference Agenda

12:30 - 12:55	Registration / Breakout Room - Speed Networking	
12:55 - 13:00	Conference Introduction	
13:00 - 13:10	Opening Remark from CCPAA-ON	Speaker Allen Yao
13:10 - 13:25	Remark from CPA Ontario	Speaker Vicki Liederman
13:25 - 13:30	Sponsor Appreciation	
13:30 - 14:00	ESG Introduction <ul style="list-style-type: none"> • Landscape of ESG and Sustainability • Financial Solutions • Emerging Topics 	Speakers Hao Tian Matthew Kielek
14:00 - 14:30	ESG Research <ul style="list-style-type: none"> • Introduction of current ESG research literature 	Speaker Yue Li
14:30 - 14:45	Breakout Room Networking / Break	
14:45 - 15:25	ESG Reporting and Strategy <ul style="list-style-type: none"> • ESG reporting and disclosure • ESG strategy and governance 	Speakers Mary Guo Julia Whitney
15:25 - 15:45	Case: ESG Application <ul style="list-style-type: none"> • Connecting Sustainability with Accounting: Real life ESG application at Algoma Steel Inc. 	Speaker Michael Moraca
15:45 - 16:15	ESG Investing <ul style="list-style-type: none"> • Considerations of ESG investing 	Speaker Vianne Xu
16:15 - 16:30	Breakout Room Networking / Break	
16:30 & Onward	Panel Discussion	Moderator Hao Tian



Allen Yao

Member of CCPAA-ON Board of Directors, and Vice-President in Strategy and Transactions Practice at EY Canada

Specializing in restructuring, turnaround and corporate finance matters, Allen has over 10 years of experience advising debtors, lenders, bondholders and investors on navigating distressed situations and maximizing value. Allen is active in the insolvency community as a committee member of the Canadian Association of Insolvency and Restructuring Professionals' corporate program.

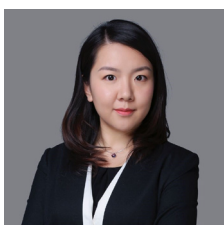


Vicki Liederman

Director, Student Recruitment at CPA Ontario

Vicki is the enthusiastic leader of the Recruitment Team at CPA Ontario. Vicki has had an extensive career in senior leadership roles with Canadian and International business organizations, including Securit, Bell Canada and Allstream. She is a coach, strategist and business leader with a passion for helping others achieve their potential.

Vicki is your link to a career in business or finance, and to a designation that will advance your knowledge, broaden your prospects and enhance your reputation ... the Chartered Professional Accountant (CPA) designation.



Hao Tian FRM

Associate in CIBC Capital Markets Global Investment Banking Sustainability Advisory Team

Prior to joining CIBC, Hao held roles in technology, risk management, global loan syndication and financial sector consulting at several well known banks and public sector.

Hao holds a Master of Finance degree from the University of Toronto Rotman School of Management and Bachelor of Economics degree from the Central University of Finance and Economics. Hao is a Certified FRM and is working on a Graduate Diploma in Social Responsibility and Sustainability from the University of St. Michael's College in the University of Toronto.



Matthew Kielek CFA

Associate in CIBC Capital Markets' Global Investment Banking Group

Matthew's focus is on advising corporate clients on environmental, social and governance matters and helping clients to achieve their sustainability ambitions and targets.

Prior to this role, Matthew spent time working within the Office of the CEO responsible for enterprise-wide strategic client initiatives and supporting the CEO in the establishment, expansion and retention of strategically important client accounts. Previously, Matthew spent time working in Asset and Wealth Management distribution, in both the retail and institutional distribution channels.

Matthew received his Bachelor of Commerce with Honours from Toronto Metropolitan University and is a CFA charterholder.



Yue Li CPA, CMA

Associate Professor of Accounting in the Institute for Management & Innovation at the University of Toronto-Mississauga, and the Associate Director of the MMPA Program

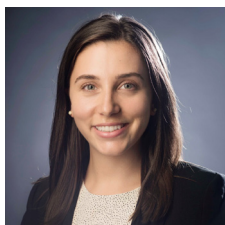
Yue Li's research focuses on the disclosure and valuation relevance of corporate environmental performance information, corporate social responsibility, as well as corporate governance and IPO valuation. Yue serves as Ad Hoc Editor for Contemporary Accounting Research, as Associate Editor for British Accounting Review and Managerial Auditing Journal, and as a Guest Editor for the Journal of Management Accounting Research. He has published in many leading accounting research journals, including the Accounting Review, Contemporary Accounting Research, Accounting, Organizations and Society, Journal of Accounting and Public Policy, European Accounting Review, Journal of Accounting, Auditing and Finance, among others.



Mary Guo CPA, CA
 Manager, EY Climate Change and Sustainability Services

As part of EY’s ESG Strategy group, Mary is involved with advising clients across sectors on integrating ESG into corporate strategy and governance, from design to implementation.

Prior to joining EY’s Climate Change and Sustainability Services practice, Mary spent 4.5 years in mergers and acquisitions and financial statement assurance practices focused on mid-market clients across various industries, as well as top-tier Canadian banks. Mary also spent 2 years in EY’s Geostrategic Business Group, advising clients across sectors on the geopolitical impacts on their business strategy and operations. Mary received her Bachelor of Commerce from Queen’s University.



Julia Whitney
 Manager, EY Climate Change and Sustainability Services

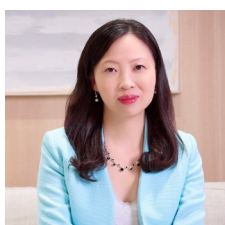
Julia is involved in supporting the delivery of ESG strategy including stakeholder engagement, materiality assessment, as well as the development of non-financial disclosures. Her client portfolio includes natural resources and extractives, lottery and gaming, hospitality, food and agriculture, social media, telecommunications and real estate.

Prior to joining EY’s Toronto office, Julia was based in Hong Kong where she supported publicly listed companies in complying with ESG disclosure requirements set by The Stock Exchange of Hong Kong Limited. Julia is a successful candidate of the GRI Standards exam, and holds a Bachelor of Arts, combined honours International Development Studies and Environment, Sustainability and Society from Dalhousie University.



Michael Moraca CPA, CMA
 Treasurer & Investor Relations Officer at Algoma Steel Group, Inc

With more than 17 years of experience, Michael is a driven finance leader with experience spanning various industries and challenging business environments, who provides an enlightened perspective to business decision making, with leadership in strategic planning, finance and capital markets. He is also an independent director (Chair) of Algoma University.



Vianne Xu CFA, CFP
 Wealth Consultant, Cidel

Vianne Xu is a Wealth Consultant at Cidel, specializing in providing wealth management solutions for high net worth families. With experience in the investment industry for almost two decades, Vianne brings to her clients expertise and help them reach their life goals. Prior to joining Cidel, she was an Assistant Vice President in the Institutional Investments Group at Invesco Canada for 5 years. Before joining Invesco, Vianne spent 6 years at Letko Brosseau & Associates, a Montreal-based asset management firm. Prior thereto, Vianne spent 4 years at the Private Client Division at BMO Nesbitt Burns. Throughout her career, Vianne has worked with numerous large institutional investors, including some of the largest pension plans, foundations, and endowments in Canada.

Vianne holds a Master of Science degree in Business Administration from University of British Columbia. Vianne is a Chartered Financial Analyst (CFA) charterholder, a member of the CFA Institute and the Toronto CFA Society. Vianne is also a Certified Financial Planner (CFP).

MC Introductions



Julian Wu
 Julian is a Senior Consultant in the Accounting and Reporting Advisory Group at Deloitte. He primarily focuses on securities filing and GAAP conversion projects. Julian joined CCPAA-ON in 2021 and recently passed the May 2022 CFE. Julian holds a Bachelor of Commerce degree from the Haskayne School of Business at the University of Calgary.



Danni Yan
 Danni Yan is a fully qualified CPA with a demonstrated history of working with both private and public multinational companies in the media and hospitality industries. Danni joined CCPAA in 2014 and has held progressive roles serving various committees. Danni holds a Bachelor of International Business Administration degree from the Schulich School of Business at York University.

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For more information contact Vianne Xu.

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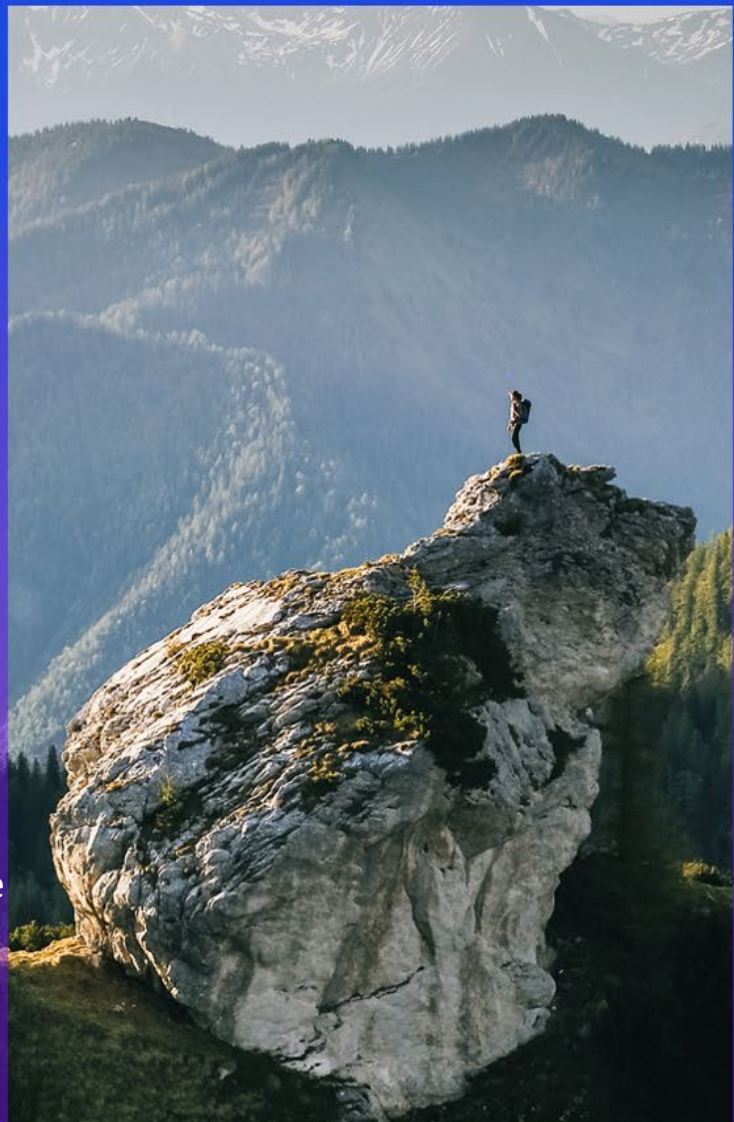
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Blockchain
Venture Capital



KVB Global
昆 命 國 際

BVCI has been officially listed as a public company on the CSE on Aug 12, 2022

Symbol: CSE-BVCI



· Digital wallet that can receive money, digital money that can be spent

· The first Canadian stablecoin CADT to be jointly issued with the Wyth Trust, a subsidiary of Wyth Financial, a Schedule I financial institution in Canada

100% Asset-backed

The Canadian dollar in the bank account corresponds to the CADT issued, to ensure the exchange ratio is always 1:1, 1 CADT=\$1 CAD, both can be exchanged any time via an account from a recognized Canadian financial institution.

Transparency

Real-time publishing of CADT and Bank's daily transaction ledger.

Safe and Trustworthy

BVCI has extensive experience in compliance and digital asset management, regulated by the Ontario Securities Commission and other industry authorities.

Real-time

BvcPay can conduct 24-hour real-time settlement of digital asset transactions, providing efficient, convenient, and low cost payment/transfers. Solving fund delays and complications for real estate developments.

The next generation of "Paypal" - "Low cost of payment solution"

BvcPay aims to promote its use in various business environments such as real estate development, e-commerce, retail, wholesale, cross-border trade, etc.



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对于首次购房者，我们专业的贷款顾问将为您提供详细指导。第一财富银行也与数百个贷款经纪人紧密合作，为您提供最适合您的贷款解决方案。

• 支持本地商户

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• 多套投资物业

目前，依靠物业租金创收的融资已经变得越来越复杂。我们的政策适合希望购买单个或多个租赁房产的合格投资者。对所投资的物业数量没有限制，您甚至可以在您的控股公司中持有抵押贷款。

• 拥有海外收入？

我们接受来自中国大陆、中国香港或者美国的确认收入。我们会把您的海外收入与加拿大收入结合补充进个人收入。

• 国际留学生

父母担保，学生借款，学生拥有100%房屋产权。

联系我们的业务发展经理：
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加拿大第一财富银行成立于2016年，是加拿大第一家由华人企业家成立的联邦一级特许银行，接受加拿大金融监管委员会最高级别的规管。第一财富银行根据华人群体的需求提供产品与服务，包括：高息储蓄账户(HISA)、GIC担保投资证、住房/商业按揭贷款，以及分红寿险保单抵押贷款，并且提供普通话、粤语、英语三语服务。

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Thank You to All of Our Volunteers!

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