

STRENGTHEN & ENRICH

Annual Report
2024-2025



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

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Website ccpaa.ca
LinkedIn 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 march forwards in the latter half of 2025, I want to take a moment to extend my gratitude to everyone. Your support in continuing to build and strengthen our community year after year and the progress the Canadian-Chinese Professional Accountants' Association - Ontario Chapter (CCPAA-ON) has achieved is something we can all be proud of. On behalf of the Board of Directors, I am honored to acknowledge the contributions and growth our organization has realized together.

This success story has been made possible through the efforts of our exceptional Board, our ever-supportive sponsors, our dedicated President – Mia Ma, and our enthusiastic volunteers. Their unwavering support, particularly for our professional development and networking events, has driven meaningful opportunities for accountants within our community. These events not only provide valuable insights for practicing professionals but also help students and foreign-trained CPAs integrate seamlessly into the profession.

One of the critical developments shaping our industry this year has been the uncertainty surrounding global trade. Rising geopolitical tensions, evolving trade dynamics, and supply chain disruptions are profoundly impacting businesses and financial operations globally. Accountants are increasingly being called upon to navigate these complexities, ensuring compliance and managing risks while strategically positioning organizations for growth. This emphasis on global trade uncertainties presents both challenges and opportunities for our profession. To delve further into these dynamics and gain actionable insights, join us at our Annual Conference on November 2, 2025!

As we look forward to what the future holds, we remain committed to supporting growth and fostering connections within our community. I look forward to meeting you at our events.

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,

It is both an honor and a privilege to continue serving as the President of CCPAA-ON and to grow alongside our Association. Over the years, CCPAA-ON has become not only a professional platform but also a community where we learn, share, and thrive together. I am grateful for the trust placed in me to lead this journey.

Looking back on the past year, I would like to extend my deepest appreciation to all who contributed to our success. To our dedicated Board members and volunteers who invested their time and energy in every initiative; to our inspiring speakers who delivered high-quality seminars; to our generous sponsors who provided invaluable financial support; and to our partner professional associations who walked alongside us in pursuit of shared progress—thank you. Every effort, every contribution, and every act of collaboration has helped us shine brighter as a community.

This year has been one of transformation. We witnessed a rapidly evolving financial landscape across North America, as well as profound changes in employment trends driven by technological innovation. I am proud that our Association responded with agility, offering timely seminars on cutting-edge topics to help our members and friends strengthen their professional expertise. We are especially proud to have expanded our focus beyond technical excellence to the inner growth of our members—encouraging self-discovery, resilience, and the courage to pursue new possibilities. These qualities are essential for navigating the challenges and opportunities of today’s dynamic environment.

As we look to the year ahead, I sincerely hope that all our members and friends will take one step further in their personal journeys, discovering new opportunities and becoming the best versions of themselves. Together, we will continue to build a stronger, more connected, and forward-looking community.

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.

Professional
Development



Business
Networking



Career
Coaching



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.

Change and evolution continued to be a theme in 2024-2025 in the world and CCPAA-ON evolved with it while maintaining its focus on the pillars of professionalism, leadership, and networking.

Throughout the year, CCPAA-ON provided its members and seminar attendees with an exciting slate of events.

Events in the CPA Excellence series delved deep into different opportunities for CPAs as they advanced in their career, and the From Self-Awareness to Self-Realization series guided attendees in building the careers they aspire to. The From Idea to Launch series discussed the various considerations for startups and the NextGen CPA Horizons series explored broader career opportunities in the market for young CPAs. The annual CPA Career Day for future CPAs was held once again, attracting a strong turnout.

The 2024-2025 year was also a ground-breaking year in partnerships for the organization - partnering with CPA Ontario, CPAC Enlight, WeWorkingWomen, CCAA, CCEA, and many other professional associations to deliver many of the events and series mentioned above, as well as others highlighted over the next few pages.

All of these events and partnerships are bookended by the annual conferences that highlight two major global shifts.

The majority of the 2024 year focused on the emergence of various generative AI technologies, and that was the focus of CCPAA-ON's 16th annual conference, which concluded the 2023-2024 year. CCPAA-ON was honored to host a varied group of generative AI industry professionals who covered topics such as the recent trends, ethical considerations, and applications in accounting. The speakers for "GenAI Horizons 2024: Innovation, Ethics, and Practice" provided a wide variety of insights based on their backgrounds in both firms and industry. They showcased the differences and similarities in which companies were adapting to and applying Gen AI, and discussed the new opportunities brought about by this ever-evolving technology.

While the world remained focused on Gen AI and its short-term and long-term effects on their own work, new changes to the geo-political climate in North America highlighted the interconnectivity of today's world and diverted some of the attention toward broader global impacts.



After decades of globalisation, leadership changes in several major economic powers and shifts in their trade policies are reshaping international markets. CCPAA-ON's 17th Annual Conference has gathered experts to discuss the macroeconomic effects as well as impacts on the various fields that CPAs work in. It will examine the far-reaching impacts of fluctuations in trade dynamics from multiple perspectives- economic trends, legal frameworks, tax implications, and operational strategies. This year's hybrid conference will offer in-person attendees the opportunity to network with the speakers, while allowing the online attendees to gain insights from the comfort of their own home.

Through its wide-ranging programming and collaborations, CCPAA-ON has continued to provide its members with the tools, perspectives, and connections necessary to thrive in a time of unprecedented change.



PROFESSIONALISM

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

The CPA Excellence Series

2024-11-17

Introduction of Alternative Investments

Speaker

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

This webinar explored alternative investments, highlighting how they can diversify portfolios and enhance returns beyond traditional asset classes. Participants examined key asset types, including private equity, hedge funds, real estate, and private credit, as well as the structures, regulatory requirements, and practical steps for incorporating these investments into personal portfolios. Attendees gained actionable insights into alternative investment strategies, enabling them to make informed decisions and optimize portfolio performance while managing risk in today's dynamic financial landscape.

2025-01-16

Webinar: Strategic Financial Planning and Analysis

Speaker

Jing Peng CPA, Manager, Finance and Business Solutions

The speaker delved into advanced Financial Planning & Analysis (FP&A) practices, offering participants strategic insights and practical tools to enhance decision-making and organizational performance. Key topics included forecasting techniques, performance measurement, financial modeling, and aligning analysis with broader business objectives. Attendees gained valuable knowledge to refine their FP&A capabilities, strengthen business agility, and drive long-term success in today's competitive environment.

2025-03-13

Webinar: Benefits and Considerations of Corporate-Owned Life Insurance

Speaker

Carol Foley LLB, CPA, CA, Director, Tax and Estate Planning Group, Canada Life

This webinar explored the benefits and considerations of corporate-owned life insurance, beginning with a review of corporate tax fundamentals and a comparison with corporate-owned investments. Participants examined the unique characteristics of corporate-owned life insurance, along with planning strategies to optimize tax efficiency and long-term financial outcomes for businesses. Attendees gained valuable insights into structuring insurance solutions within a corporate context, supporting informed financial decisions and enhanced business planning.

2025-10-18

Seminar: Tax Dispute Update

Speakers

Dean Blachford LLB, BCL, Tax Lawyer, Blachford Tax Law

Ella Sui Law Clerk & Office Manager, Blachford Tax Law

This webinar provided practical guidance for CPAs on helping clients minimize the risk of significant tax disputes with the CRA. Participants examined common issues related to shareholder loan accounts, strategies for responding to CRA requests for information, emerging trends such as house flipping audits, and updates on the Voluntary Disclosure Program. Attendees gained actionable insights to navigate audits effectively, stay ahead of evolving CRA practices, and provide informed, proactive support to their clients.

Building Blocks for Startups

2025-04-15

Webinar: Legal Foundations for Startups

Speaker

Tina Liu Partner, O'Connor MacLeod Hanna LLP

This webinar explored the legal foundations essential for startups, covering critical topics for founders and accounting professionals. Participants examined startup capitalization, corporate governance basics, record-keeping practices, and key legal documentation such as subscription agreements, investor/shareholder agreements, term sheets, and confidentiality agreements. Attendees gained practical knowledge to structure their startups effectively, ensure compliance with legal requirements, and set the foundation for long-term business success.

2025-06-14

Seminar: Fundamental Accounting and Taxation for Startups

Speaker

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

This seminar provided practical insights into fundamental accounting and taxation considerations for startups, tailored for founders and professionals supporting them. The session explored basic legal protections, hiring and termination rules, payroll obligations, and related tax compliance requirements. Attendees gained actionable knowledge to manage accounting and tax responsibilities effectively, ensuring their startups operate smoothly while meeting regulatory obligations.



2025-07-06

Seminar: Corporate Governance & Finance for Startups

Speaker

Jerom Yu CPA, MBA, CFO, Xodus Travel Services Inc.

This seminar explored the essential elements of corporate governance and finance for startups, providing guidance on building a strong foundation for sustainable growth. Participants examined legal and financial structures, operational management, reporting practices, and people management, as well as considerations for taxes and funding. Attendees gained practical insights to make informed decisions, avoid common pitfalls, and establish resilient, investor-ready businesses that are positioned for long-term success.



From Self-Awareness to Self-Realization



2025-07-19

Navigating Finance Careers Outside of Public Accounting

Speakers

Anni Li CPA, CA, Director of Customer & Commercial Finance, Coca-Cola Canada Bottling Ltd.

Jessica Wang CPA, CA, Director, Financial Planning & Analysis, Pure Industrial

This seminar explored diverse career opportunities in finance beyond the traditional public accounting path, highlighting the skills and competencies needed to succeed. Participants gained insights into both technical and non-technical capabilities required across various roles in corporate finance, and financial planning & analysis. Attendees walked away with a broader understanding of alternative finance career paths, practical guidance for professional growth, and strategies to position themselves for success in dynamic financial environments.

2025-08-09

Self Awareness – On Your Career Journey

Speaker

Xin Sun Principal Lawyer, XS Law Professional Corporation

This seminar explored the role of self-awareness in career development, highlighting its impact on professional growth and workplace effectiveness. Participants examined how personality traits influence communication, decision-making, and interactions across different organizational settings, from startups to large firms. Attendees gained practical strategies to enhance self-awareness, strengthen relationships with clients and colleagues, and advance their careers with greater confidence and effectiveness.

2025-08-17

Unlock Workplace Breakthrough Power: A Deep Exploration of the Six Levels of Human Thinking

Speaker

Sherry Zhang Founder & President,
WeWorkingWomen Org

This seminar explored strategies to unlock workplace breakthrough potential, using Robert Dilts' Logical Levels Model to identify and overcome mental roadblocks. Participants examined how environment, behavior, values, and identity influence professional growth, and engaged in thematic discussions and practical exercises. Attendees gained actionable insights to enhance self-awareness, drive career transformation, and empower the next stage of their professional development.

2025-09-13

From Spreadsheets to Freedom - GO F.I.R.E.!

Featured Speaker

Loewe Ke Founder and CEO of KE Solutions and Jobster.io

Panelists

Joe Li Tax Partner, KPMG LLP

Allen Yao Partner and Senior Vice President, EY-Parthenon

Michelle Zhang Partner, International Tax, Deloitte

Bo Yuan Vice President, Global Accounting, Financial Reporting & Control, Great-West Lifeco Inc.

Mavis Mu Vice President of Finance, Symtech Innovations Ltd.

Yanna Xie Director, Technology & Innovation Banking, Scotiabank

This seminar explored diverse career paths and opportunities within the accounting profession, catering to professionals at all stages, from recent graduates to senior executives. Participants engaged in keynote presentations and panel discussions, gaining insights into career growth, leadership roles, and long-term professional development. Attendees also benefited from valuable networking opportunities and practical guidance to help navigate and advance their careers in the dynamic accounting landscape.



CPA Career Day

Shaping Futures, Shaping Success



Keynote speaker

Jerom Yu CPA, MBA, CFO, Xodus Travel Services Inc.

CPA Ontario representative

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

Panelists

Lorraine Lu CPA, Deals Manager, PwC

Viki Ma CPA, Audit Manager, EY

Priya Roy Supervisor, SGGG Fund Services Inc.

Yamil Salomon Property Analytics & Budgeting Lead, Ontario Provincial Government

Round table mentors

Zizheng Gan CPA, Tax, Public Accounting Firm

Grace Lin CPA, Operations M&A, KPMG

Cindy Liu CPA, Operations M&A, KPMG

Shell Liu CPA, Manager, Accounting & Reporting Advisory, Deloitte

Moby Sun CPA, Fixed Assets & Lease Accounting, Freedom Mobile

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.

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.



Young professionals, join us in fostering growth and success!

NextGen CPA Horizons

A professional development series designed for young professionals to explore broader career possibilities and unlock their potential. Through engaging talks, real-life career stories, and interactive discussions, the series provided valuable insights to help participants expand their vision, gain practical guidance, and build confidence for the new stage of their professional journey.

2025-02-06

CPAC Enlight & CCPAA-ON Series 1 Hedge Accounting

Speaker

Annie Zhang CPA, CFA, Senior Manager, Hedge Accounting, TD

The speaker led the session in examining emerging opportunities in the accounting profession, the direction of its future development, and how professionals can stay ahead in a rapidly evolving landscape.

2025-02-20

CPAC Enlight & CCPAA-ON Series 2 Beyond Auditing

Speakers

Vicky Li CPA, Senior Consultant, Finance Transformation, Management Consulting, KPMG

Nancy Qiu Senior Accountant, Audit & Consulting, EY

The speakers shared their perspectives on exploring opportunities beyond traditional audit roles. The webinar provided valuable insights into how audit experience can be leveraged as a strong foundation for diverse career paths, from consulting to finance transformation. Through inspiring career stories and practical advice, participants were encouraged to think broadly about their professional journeys and unlock the full potential of their audit background.

2025-03-06

CPAC Enlight & CCPAA-ON Series 3 Taxation & Accounting Advisory

Speakers

Ray Chen Partner, Z&C CPA Firm

Shell Liu CPA, Accounting & Reporting Advisory, Deloitte

CCPAA-ON invited two speakers to share their experiences in the field of taxation and accounting advisory. The session offered young professionals practical insights into career opportunities, day-to-day challenges, and growth pathways in this specialized area. Through real-world stories and interactive discussion, participants gained a deeper understanding of how tax and advisory expertise can serve as a powerful foundation for long-term career development.

2025-03-20

CPAC Enlight & CCPAA-ON Series 4 Strategy and Deal Advisory

Speakers

Loewe Ke CEO, KE Solutions & Jobster.io

Grace Lin CPA, Senior Consultant, Strategy & Deal Execution, KPMG

Featuring our speakers, this session explored the broader landscape of accounting and finance career paths, from audit and tax to strategy and deal advisory. The speakers shared market trends, career advancement strategies, and essential skills for success, inspiring participants to think beyond traditional career trajectories. Attendees walked away with actionable insights and a clearer vision of how to navigate opportunities in the dynamic world of strategy and deals.

2025-02-12

Campus Info Session: Western University

Panelists

Andy Ma Finance Leadership Development Program (CPA Preapproved Program), Siemens Canada

Mia Ma Tax Manager, Grant Thornton LLP, President, CCPAA ON

Nicholas Qin Senior Manager, Finance, National Bank of Canada

Following a reflective start to 2025 post-recovery from 2024, 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 taxation, 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.

2025-03-26

Webinar: Unlocking Opportunities in Carbon Markets: A Guide for Accountants

Speakers

Hao Tian Blended Finance Solutions Advisor, Global Climate Finance Accelerator

Yingzhi Sarah Tang Senior Research Associate, Institute for Sustainable Finance

This webinar explored opportunities in carbon markets, providing accountants with a comprehensive overview of both compliance and voluntary frameworks. Participants examined the evolving regulatory landscape, market dynamics, and the role of accountants in ensuring integrity and effective carbon strategy implementation. Attendees gained practical insights to guide businesses in navigating carbon markets, aligning sustainability initiatives with financial objectives, and contributing to long-term environmental and organizational impact.

2025-06-05

Webinar: Employment Law & Tax Essentials

Speakers

Xin Sun Principal Lawyer, XS Law Professional Corporation

Mark Both CPA, CA, Director of Cloud Accounting, Kraft Berger LLP

This webinar explored the fundamentals of employment law and taxation, providing practical guidance for both employers and employees. Participants examined key topics including workplace rights and obligations, employment contracts, payroll considerations, and related tax compliance requirements. Attendees gained actionable insights to navigate employment law effectively, ensure compliance, and make informed decisions that support both organizational and employee success.



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 operations departments (e.g., Business Development, Communication, Public Relations, Administration).

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 Operations 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!

Startup Series Collaboration with ID8 Ventures

In 2025, we collaborated with ID8 Ventures to launch the “From Idea to Launch: Building Blocks for Startups” series, providing professional support to the startup community while helping accounting professionals better understand the unique needs of early-stage businesses. The series covered:

- Legal foundations – startup capitalization options (common shares, preferred shares, convertible notes, SAFEs), corporate governance basics, record-keeping, and essential agreements.
- Accounting & taxation – practical insights into financial reporting, workplace compliance, hiring and termination rules, and related tax obligations.
- Corporate governance & finance – establishing strong structures for funding, reporting, people management, and operational growth to build resilient, investor-ready businesses.

Through this collaboration, CCPAA-ON and ID8 Ventures empowered entrepreneurs with essential knowledge while bridging connections between the startup ecosystem and CPA professionals, fostering innovation and community growth.

NETWORKING

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



Unlock Workplace Breakthrough Potential

On August 17, 2025, CCPAA-ON partnered with WeWorkingWomen to host a seminar designed to help professionals deepen self-awareness and identify personal growth opportunities. Through interactive discussions and practical frameworks, participants explored strategies to overcome mental roadblocks and enhance career development. This collaboration reflects CCPAA-ON's commitment to building stronger ties with diverse professional community associations, enriching the range of programs we offer, and providing members with broader perspectives, tools, and resources to support both personal and professional growth.

2025 Young Professional Series: NextGen CPA Horizons

We partnered with CPAC Enlight to co-host professional development series designed for young professionals entering the workforce. The program complemented resources between the two organizations and provided participants with deeper insights into the accounting profession and its diverse career paths.

The series included Beyond Audit, inspiring professionals to explore opportunities beyond traditional audit roles; Taxation & Accounting Advisory, offering practical guidance and real-world industry experiences; and Strategy & Deal Advisory, highlighting market trends, skill-building, and career advancement strategies.

Through this collaboration, CCPAA-ON strengthened community connections while equipping the next generation of CPAs with valuable knowledge, inspiration, and networking opportunities to support their long-term career growth.

2025 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 and resilient professional network for the future.

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

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Keynote Speaker

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Cindy Liu CPA, Senior Consultant, Operations M&A, KPMG

Shell Liu CPA, Manager, Accounting & Reporting Advisory, Deloitte

Moby Sun CPA, SPV, Fixed Assets & Lease Accounting, Freedom Mobile

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Mavis Mu Vice President of Finance, Symtech Innovations Ltd.

Yanna Xie Director, Technology & Innovation Banking, Scotiabank

2025.10.18 Tax Dispute Update

Dean Blachford LLB, BCL, Tax Lawyer, Blachford Tax Law

Ella Sui Law Clerk & Office Manager, Blachford Tax Law

THANK YOU TO ALL OF OUR VOLUNTEERS!

Zizheng 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
Ivy Yang
Nico Yuan
Jacqueline Zhang
Pennie Zhao
Sophie Chen
Mingyu Chu
Grace Lin
Amy Xu
Olivia Lu
Yuanqi Song
Jiakai Xu
Di Yang



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





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



Jerom Yu
Board Member



Bo Yuan
Board Member



Lei Wu
Board Secretary



Pennie Zhao
Treasurer

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



Zizheng Gan
Co - VP, Professional
Development



Cindy Liu
VP, Communications



Linda Liu
VP, Membership



Moby Sun
VP, Public Relations



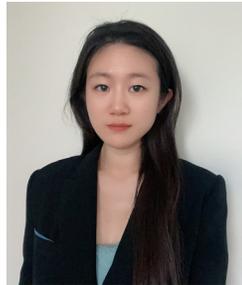
Dongsheng Wang
VP, Business
Development



Gabriella Lu
Co - Director,
Professional Development



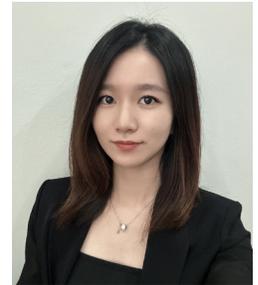
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Julian Wu
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Marco Li
Event Advisor



Andy Ma
Event Advisor



Ivy Yang
Communications Specialist

Trade Dynamics and Global Impacts

In an era of shifting economic landscapes, global trade continues to evolve, influencing markets, investment, and business strategies worldwide. As organizations adjust to the trade environment, supply chain disruptions, and financial regulations, professionals must navigate complex dynamics to remain competitive. Understanding these shifts is essential for businesses to mitigate risks and seize opportunities in a rapidly changing global economy.

CCPAA-ON's 17th Annual Conference, "Trade Dynamics & Global Impacts", aims to examine the far-reaching impacts of fluctuations in trade dynamics from multiple angles – economic trends, legal frameworks, tax implications, and operational strategies.

09:00 – 09:30 **Breakfast, Registration & Networking**

09:30 – 09:35 **Conference Introduction**

09:35 – 09:45 **Opening Remark from CCPAA-ON**

09:45 – 09:55 **Remark from CPA Ontario**

09:55 – 10:00 **Sponsor Appreciation**

10:00 – 10:45 **Navigating the Fog of US Trade Policy**

Examine how tariffs and trade wars shape global trade flows, influence inflation, and drive long-term shifts in global growth dynamics. Also, explore how they lead to the reconfiguration of supply chains and investment patterns.

10:45 – 11:30 **Legal Framework and Policy Considerations**

Explore the legal aspects of tariffs/trade war, including domestic legislation, international trade agreements, etc. Discuss the role of dispute resolution mechanisms, trade retaliation, and legal compliance challenges for multinational businesses.

11:30 – 12:30 **Cross-Border Tax and Transfer Pricing Implications**

Investigate transfer pricing basics and customs valuation rules, and evaluate tax and customs planning opportunities and risks in global structuring. Understand the interactions between transfer pricing, customs valuations, and international tax planning.

12:30 – 13:30 **Lunch & Networking**

13:30 – 14:15 **Operational Impact and Strategic Business Response**

Analyze recent macroeconomic trends and explore strategies for strengthening operational and business resilience—supported by practical frameworks and real-world case studies.

14:15 – 14:45 **Leverage Trade Finance to Go Global**

Gain an overview of strategies and resources available to help businesses expand internationally. Through success stories and best practices, the session will showcase how tailored financial solutions and expert guidance can help organizations navigate international markets and achieve their global ambitions.

14:45 – 15:30 **Real World Case Study and Insights on the Bakery Industry**

Review a case study to highlight the impact of tariff/trade war on the bakery industry. Discuss actions taken to adjust operational and financial strategies, mitigate risk, optimize compliance, and streamline processes with technology in response to a dynamic trade environment.

15:30 – 16:00 **Coffee Break & Networking**

16:00 – 17:00 **Panel Discussion**

Panelists

Jessica Horwitz **Kenneth Jordan**
Vincent Le **Mei He**

Michelle Zhang Partner, International Tax Services, Deloitte, CCPAA

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

Speaker

Christy Chen PhD, CFA, Director, Enterprise Stress Testing, Global Risk Management, Scotiabank

Speaker

Jessica Horwitz Partner, International Trade and Investment, Bennett Jones LLP

Speakers

Maria Cherkasova CPA, CA, Partner, Tax-Global Transfer Pricing Services, KPMG Canada

Kenneth Jordan CCS (US/CA), CTCS, Partner, Trade & Customs, KPMG Canada

Speakers

Vincent Le Partner, Strategy & Execution, EY Parthenon

Whitney Xu CPA, Senior Consultant, Strategy & Execution, EY Parthenon

Speaker

Mohamed El Metni Senior Manager, Trade Finance Solutions, RBC

Speaker

Mei He CPA, Vice President, Finance, Bond Bakery Brands Ltd.

Moderator

Cindy Liu CPA, Senior Consultant, Deal Advisory, KPMG Canada

Michelle Zhang



Michelle Zhang is a Partner with the International Tax Services practice of Deloitte in Toronto. She assists clients across sectors and industries in developing tax-efficient structures for cross-border acquisitions, joint ventures, corporate reorganizations, cash management and repatriations, and financing transactions. With 15 years in practicing Canadian international tax, Michelle has deep knowledge and extensive experience about both the Canadian inbound and outbound/through-bound investments.

Prior to moving to Canada as an immigrant in late 2010, Michelle spent almost 9 years in China practicing China tax. As a result, Michelle has decent tax and business knowledge of the Asia-Pacific region as well.

Christy Chen



Christy Chen is a seasoned economist with two decades of experience in Canada's financial industry, including 10 years as a senior economist at a Big-5 bank and additional senior roles in the risk management area. A trusted voice in Toronto's media, Christy is a frequent commentator on central bank policy and market trends, and previously penned an economics column for Ming Pao. Christy holds a PhD in Economics from the University of Victoria. She is also a CFA charterholder, a certified FRM, and has lectured for eight years at the University of Toronto's Department of Economics.

Maria Cherkasova



Maria Cherkasova is a Partner in KPMG's transfer pricing practice. She has been with KPMG and a member of the transfer pricing group since 2010. She has experience in a variety of complex transfer pricing matters, including planning, dispute resolution, and documentation. Maria

serves a client base spanning a wide array of industries, including consumer & industrial markets, software & technology, financial services, infrastructure, and real estate. She is experienced in supporting multinational companies through business reorganizations, performing value chain analyses, managing large documentation engagements, and assisting clients in CRA audits, appeals, and competent authority proceedings.

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. Carmen holds a certificate in Leadership and Inclusion from Centennial College and is a committed member of CPA Ontario's EDI Working Group.

Jessica Horwitz



Jessica Horwitz is a partner at Bennett Jones LLP in Toronto, specializing in international trade and investment law. She advises clients on a wide range of trade-related matters including customs, trade remedies, WTO law, export controls and economic sanctions, and supply chain compliance and represents businesses in appeals, enforcement, and investigations with Canadian regulatory and law enforcement agencies. Recognized by Chambers Global, Legal 500 Canada, and Best Lawyers in Canada, she is actively involved in several legal organizations and has held leadership roles in not-for-profit industry associations.

Kenneth Jordan



Kenneth Jordan has 12 years' experience advising clients with accounting firms, including 10 years with KPMG. Kenn has extensive experience working on projects involving various government agencies and non-government organizations in and outside Canada,

which assists in building a complete understanding of the import process and import requirements. Bringing this holistic approach to serving clients allows Kenn to assist in mitigating risks while creating liquidity in an area that usually is considered a cost centre. Kenn specializes in auditing processes and procedures, process and procedure improvement, duty recoveries and mitigation and establishing new business in Canada with compliant customs functions.

Vincent Le



Vincent Le is a Partner with deep expertise in value creation, turnaround strategy, M&A, and operational restructuring. He has led over 100 engagements, advising executive teams on strategic transactions, organizational realignments, and operational

transformations. His clients include public and private companies, with a strong focus on private equity and portfolio firms. Vincent's experience spans industries such as manufacturing, technology, consumer goods, financial services, and engineering & construction, delivering results through trusted leadership and practical guidance.

Whitney Xu



Whitney Xu is a Senior Consultant in EY Parthenon's Value Creation team, with experience in operational and cost optimization, financial and commercial due diligence, and inventory and procurement efficiency optimization. She holds a master's degree in management and

accounting from the University of Toronto and has participated in multiple engagements across the government and public, retail, manufacturing, and financial services sectors.

Mohamed El Metni



With a 10+ year tenure in commercial banking, Mohamed El Metni supports Small and Medium Enterprises (SMEs) with supply chain finance solutions. Mohamed helps companies by delivering bespoke trade financing structures and risk mitigation instruments to SMEs with

international and domestic counterparties, positioning them for growth and stability in their physical supply chains.

Mei He



Mei He, CPA, is Vice President of Finance at Bond Bakery Brands with over 15 years of experience in finance, management, and strategic growth. She leads high-performing teams, oversees financial strategy, and drives scalable growth through acquisition, integration and strong

accounting practices. With expertise in corporate finance, FP&A, and operations, Mei partners with internal and external stakeholders to align financial performance with long-term goals. Passionate about leadership and talent development, she mentors accountants, fosters collaborative cultures, and inspires the next generation of finance professionals.

Jacqueline Zhang MC



Jacqueline Zhang is a manager at KPMG in the Private Enterprise Audit group. She has extensive

experience in working with a variety of audit clients by managing audit operations, leading audit teams, and overseeing specific areas such as financial audits, compliance reviews, and operational assessments.

Andy Ma MC



Andy Ma is a Finance Leadership Development Program Associate at Siemens Canada,

specializing in financial analysis, internal controls, and financial reporting. Before joining Siemens, he completed co-op placements at PwC and Canadian Tire, gaining valuable experience in accounting and financial operations.

Cindy Liu Moderator



Cindy Liu is a Senior Consultant at KPMG in the Operations Mergers and Acquisitions group. She supports clients

in a wide array of industries, supporting them in pre-deal diligence as well as pre-Close and post-Close in transactions. She minored in international studies in university and has a deep interest in helping companies and individuals navigate change on the international stage.



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In today's complex economic landscape, it is critical to have a comprehensive approach to navigating trade and tariffs. KPMG in Canada can help businesses optimize strategies and build resilience in the face of continuous uncertainty.

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Contact a member of our team to learn more and make informed decisions on what's best for your business.

Contact us



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