

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

STRENGTHEN & ENRICH

Annual Report

2025–2026

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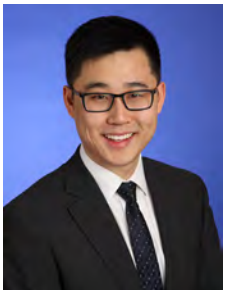
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Website ccpaa.ca
LinkedIn ca.linkedin.com/in/ccpaa
WeChat ccpaa-on

LETTER FROM THE BOARD



Joe Li
Chair of the Board of Directors

Dear CCPAA-ON Community,

As the Canadian-Chinese Professional Accountants' Association – Ontario Chapter marks its 18th year, I want to thank each of you for helping our community grow stronger. What began in 2008 as a small group of professionals has become the largest Canadian-Chinese CPA community in the province. On behalf of the Board of Directors, I am proud of what we have built together and grateful for the trust you continue to place in us.

None of this would be possible without our dedicated Board, our President – Mia Ma, the executive team, and the many volunteers who give their evenings and weekends to serve fellow members. I also extend my sincere thanks to our sponsors – CPA Ontario and Xin Law – and to our promotional partners and student associations for helping us reach the next generation of professionals.

This year, our seminars went beyond technical updates to address the skills today's accountants need most. Members explored ethical leadership in practice, practical communication and networking skills, compliance and growth for owner-managed businesses, and the startup journey through our series with ID8. Our AI Toolkit for the Modern CPA seminar drew strong interest, reflecting how quickly artificial intelligence is reshaping our daily work. These sessions continue to serve practicing professionals while helping students and internationally trained accountants build their careers in Canada

Looking at our profession more broadly, two forces stand out in 2026. First, businesses are expanding across borders amid shifting trade relationships and a changing energy landscape, bringing new tax, structuring and reporting questions. Second, AI is changing how we prepare, review and deliver our work. These changes ask more of us, but they also create room for accountants to focus on judgment, advice and strategy – the work that adds the most value.

To explore these themes together, I warmly invite you to our 18th Annual Conference, "Energy in Motion: Cross-Border Expansion, Tax and Reporting," on Sunday, October 25, 2026. Whether you join us in person or virtually, it will be a day of practical insights, meaningful conversations and reconnecting with friends and colleagues.

As we look ahead, the Board remains committed to strong governance, sound financial stewardship and programs that reflect what our members need. Thank you for being part of the CCPAA-ON community. I look forward to seeing you at our events.

Sincerely,

Joe Li

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

LETTER FROM THE COMMITTEE



Jessica Jin
Incoming Co-President

Dear CCPAA-ON Members and Friends,

It is my great pleasure to reflect on another meaningful year for CCPAA-ON. As our profession and the broader business environment continue to evolve, CCPAA-ON remains committed to bringing our community together to learn, connect, and grow.

I would like to extend my heartfelt appreciation to our dedicated volunteers and Board members for the time, energy, and commitment they have generously contributed throughout the year. As a not-for-profit organization, our progress would not be possible without their contributions of time and expertise to support our initiatives. I am also grateful to our speakers and professional partners who generously share their knowledge and experience with our community, and to our sponsors for their continued trust and support. Every contribution helps us create meaningful opportunities for professional development, networking, and connection, and strengthens the community that CCPAA-ON strives to serve.

This year, we continued to provide opportunities for professional development, knowledge sharing, networking, and community connection, with a focus on both technical knowledge and the broader skills needed to navigate today's changing professional landscape. We also continued to support professionals at different stages of their careers and create opportunities for meaningful connections within our community.

Our 18th Annual Conference explores the growing importance of energy in today's economic and business environment, bringing together perspectives on economic trends, tax, financial reporting, operations, and governance. We hope it provides our community with valuable insights into the challenges and opportunities ahead.

It is a great honour and privilege to serve as Co-President of CCPAA-ON in the coming year. I am excited to continue working alongside our Board, volunteers, members, partners, and sponsors. Together, we will continue strengthening professional development, fostering meaningful connections, and supporting the next generation of accounting and finance professionals. I look forward to continuing this journey together.

Sincerely,

Jessica Jin

Incoming Co-President
Canadian-Chinese Professional Accountants' Association - Ontario Chapter

Canadian-Chinese Professional Accountants Association

Ontario Chapter
NPO Since 2008



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.

2025–2026 **Annual Events Recap**

Adaptability, innovation, and professional growth were defining themes for CCPAA-ON throughout 2025–26. As economic uncertainty, technological advancements, and evolving career paths continued to shape the accounting profession, CCPAA-ON remained committed to supporting members through high-quality professional development, leadership learning, and networking opportunities. Throughout the year, the organization delivered a diverse slate of events designed to help CPAs and aspiring professionals navigate change, build skills, and create meaningful connections.

The year began with CCPAA-ON's 17th Annual Conference, Trade Dynamics & Global Impacts, which closed the 2024–2025 year. The hybrid event brought together experts from economics, law, taxation, finance, and industry to explore the business impacts of evolving trade policies and geopolitical developments. Speakers addressed U.S. trade policy, regulatory and tax considerations, operational resilience, trade finance, and strategies for navigating disruption and uncertainty.

Professional development remained a core focus of CCPAA-ON's programming. Through the CPA Excellence series and related technical seminars, participants explored a wide range of topics including year-end audit preparation, Canadian tax developments, international tax considerations, finance in the banking industry, asset protection strategies, and building sustainable business growth. These sessions provided members with practical insights into emerging challenges and opportunities across the accounting profession.

As organizations continued to embrace digital transformation, CCPAA-ON expanded its technology-focused programming. Members participated in sessions covering Power BI fundamentals, automation and reporting, artificial intelligence tools and applications, and the ethical considerations associated with AI implementation. These events highlighted the growing importance of data analytics, automation, and digital literacy in the future-ready workplace.

Supporting the next generation of accounting professionals remained another important priority. Through initiatives such as the Young Enterprise Accountants Series, Future-Ready Professional Series, CPA Career Day, and information sessions for internationally trained professionals, CCPAA-ON continued to provide guidance and support to students, new graduates, internationally trained professionals, and early-career CPAs. These initiatives were strengthened through collaborations with valued partners including CPA Ontario and CPAC Enlight.

Entrepreneurship and business leadership programming also continued to grow during the year. Through CCPAA-ON's startup-focused programming delivered in collaboration with ID8, participants gained practical insights into early-stage business foundations, valuation and investment readiness, exit planning, value creation, and navigating growth amid uncertainty. These sessions provided valuable perspectives for entrepreneurs, business owners, and advisors supporting emerging businesses.

Leadership and networking remained integral pillars of the organization. Members participated in sessions focused on professional networking, leadership development, and ethical decision-making, providing opportunities to strengthen leadership capabilities while building meaningful professional relationships across industries and sectors.



The 2025-2026 year now culminates in CCPAA-ON's 18th Annual Conference: Energy in Motion: Cross-Border Expansion, Tax and Reporting, which will take a high level look at the macro energy sector overall, and in Canada, before moving on to examine the implications of the changes in the sector on ethics, taxes, financial reporting, and business strategy.

Through its diverse programming, strategic partnerships, and commitment to professional excellence, CCPAA-ON has continued to provide members with the knowledge, skills, and connections needed to succeed in a rapidly evolving profession. As change continues to shape the business landscape, CCPAA-ON remains dedicated to supporting its community through learning, leadership, and collaboration.



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

2025-10-11

Introduction to Canadian Outbound International Tax

Speaker

Michelle Zhang Partner, International Tax, Deloitte

Winnie Wang CPA, MTax, Senior Manager, International Tax, Deloitte

This webinar explored fundamental Canadian outbound international tax considerations for Canadian companies with foreign subsidiaries. Participants examined key concepts including foreign affiliates, controlled foreign affiliates, foreign accrual property income (FAPI), and surplus computations. Attendees gained valuable insights into navigating cross-border tax structures and understanding the tax implications of international business operations.

2025-11-18

Introduction to Canadian Inbound International Tax

Speaker

Michelle Zhang Partner, International Tax, Deloitte

Angel Tong CPA, MTax, Senior Manager, International Tax, Deloitte

This webinar explored fundamental Canadian inbound international tax considerations for foreign companies investing in Canada. Participants examined key topics including operating through a Canadian corporation versus a branch, repatriating funds from Canadian subsidiaries to foreign parents, and tax considerations when exiting a Canadian investment. Attendees gained valuable insights into structuring cross-border investments and navigating Canadian international tax requirements.

2026-01-27

Preparing for a Successful Year-end Audit

Speakers

Jacqueline Zhang CPA, Manager, Private Enterprise Audit, KPMG

This webinar explored key considerations for preparing for a successful year-end audit, focusing on strengthening organizational readiness. Participants examined the audit process, pre-audit planning, financial record preparation, and account reconciliations, along with effective communication with auditors. Attendees gained valuable insights into enhancing audit preparedness, improving financial accuracy, and strengthening internal processes for future reporting success.

2026-03-26

Finance in the Banking Industry

Speaker

Nicholas Qin CPA, Senior Manager, Finance at National Bank Financial

This webinar explored the structure and key functions of finance teams within large banking institutions, with a focus on financial reporting and FP&A operations. Participants examined how finance professionals support business strategy through budgeting, performance analysis, and the monitoring of key metrics such as net interest margin, operating costs, and revenue growth across different banking divisions.

CPA Excellence Series (continued)

2026-04-07

Canadian Income Tax Update

Speaker

Henri Klein CPA, CA, Senior Manager, Tax, KPMG
Janice Lai CPA, CA, Senior Manager, Tax, KPMG
Cosimo Commisso CPA, MAcc, Manager, Tax, KPMG

This webinar explored key updates and policy directions from the 2025–2026 Canadian federal tax landscape. Participants examined implications for both corporate and personal taxation, including tax planning, compliance requirements, and cross-border considerations. Attendees gained valuable insights into adapting to the changing tax environment and supporting informed financial decision-making.



2026-07-25

How to Protect Your Assets

Speaker

Xin Sun Principle Lawyer of XS Law Professional Corporation

This webinar explored key legal considerations in asset protection from both family law and estate planning perspectives. Participants examined the division of family property, asset protection strategies such as domestic contracts and trusts, and essential estate planning tools including wills, powers of attorney, and beneficiary designations. The session highlighted practical examples of how legal structures and planning decisions can impact wealth preservation in events such as divorce and death.



2026-10-20

Tax Dispute Update

Speaker

Dean Blachford LLB, BCL, Tax Lawyer, Blachford Tax Law
Ella Sui Law Clerk & Office Manager, Blachford Tax Law

This year's annual tax dispute update discussed GST/HST rebates and assessments, statute-barred year defense, and common RRSP/TFSA issues. The speakers discussed circumstances that can result in significant reassessments and pentalties, propoerty-flipping and self-supply rules, and practical knowledge and strategies that practitioners can use in their own work.



Building a Foundation for Sustainable Growth

2026-04-16

Startup - Early Stage ID8: Early Stage

Speaker

Tina Liu Partner, O'Connor MacLeod Hanna LLP

Claire Tian CPA, CA, Senior Tax Manager, Doane Grant Thornton LLP

This webinar explored key legal and tax considerations for early-stage startups. Participants examined business structures, shareholder agreements, and investor protection mechanisms, alongside tax implications of different entity types and financing arrangements. The session highlighted practical guidance on structuring and organizing startup operations in the early phase.

2026-05-10

Startup - Early Stage ID8: Valuation

Speakers

David Dai CPA, Manager, Valuations & Financial Advisory, Clearhouse LLP

Richard Meng Co-founder, MyDreamFinance

This seminar explored key concepts and practical approaches to business valuation in early-stage startups. Participants examined how strategy, unit economics, and KPI performance drive valuation, along with the role of FP&A in forecasting, scenario planning, and execution. Attendees gained valuable insights into building sustainable value and enhancing investor confidence in a startup environment.

2026-05-31

Startup - Early Stage ID8: Exit Plan

Speakers

Jeff Ng Managing Director, Corporate Finance, MNP

This seminar explored key considerations for planning a successful business exit within the M&A landscape. Participants examined transaction strategies, valuation drivers, timing considerations, and the key stages of the sale process. The session highlighted practical insights into structuring transactions and identifying potential buyers to maximize business value.

2026-06-21

Startup - Early Stage ID8: Navigate Turbulence to Growth

Speakers

Allen Yao CPA, CA, CFA, CIRP, Partner and Senior Vice President, Strategy and Transactions, EY

Jack Yu Partner, China Practice Group, Fasken

Bernard He Managing Partner, Bright Mega

This seminar explored how organizations can navigate financial and operational challenges in uncertain environments. Participants examined strategies for assessing financial health, managing liquidity, and evaluating strategic options during periods of stress. Drawing on real-world examples, the session highlighted practical approaches to restructuring, transaction strategy, and value preservation. Attendees gained valuable insights into enhancing resilience, supporting decision-making, and positioning businesses for sustainable growth.

2026-09-12

Owner Management: Compliance and Growth for Private Enterprises

Speakers

Tina Liu Partner, O'Connor MacLeod Hanna LLP

Jessica Jin CPA, CA, LPA, Partner, Kraft Berger LLP

George Hsu Product Manager, Toronto Branch Manager, Enoch Wealth

Daniel Yao CPA, General Manager at DY ACCOUNTING AND TAX CONSULTING

This seminar brings together leading industry experts to address the critical pillars of Owner Management, including protecting corporate assets and mitigating liability through Corporate Law & Structure, preparing robust financial reporting to unlock diverse funding channels through Accounting & Funding, optimizing tax structures and securing a seamless wealth legacy through Corporate Tax & Estate Planning, and maximizing returns on corporate surplus cash while managing tax implications through Passive Investment.



Digital Transformation & Future-Ready Technology



2026-02-19

From Data to Information: An Introduction to Power BI

Speakers

John Samuels Senior Business and Data Analyst, TD Wealth

This webinar provided an introduction to Power BI and its role in modern reporting workflows. Participants examined key reporting stages, including data extraction, transformation, and visualization, along with core Power BI tools such as Power Query and Power BI Desktop. The session also highlighted practical data preparation techniques and report-building capabilities. Attendees gained valuable insights into enhancing efficiency, accuracy, and data visualization in accounting and finance reporting.

2026-03-12

From Data to Information: Automation, Reporting, Collaboration (Power BI)

Speaker

John Samuels Senior Business and Data Analyst, TD Wealth

This webinar explored how automation, reporting, and collaboration tools can enhance data workflows in finance and accounting. Participants examined the use of Power Query, modern Excel capabilities, and OneDrive/SharePoint to streamline data preparation and reporting processes. The session highlighted practical approaches to improving efficiency and reducing errors. Attendees gained valuable insights into building more reliable, automated, and collaborative reporting solutions.

2026-09-27

Common AI Tools and How to Use Them Effectively

Speaker

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

This session examined the growing role of artificial intelligence in the accounting profession and introduced practical AI tools, including Custom GPTs, ChatGPT Projects, Google NotebookLM, and AI browser agents. Through demonstrations and real-world examples, participants explored how these technologies can enhance productivity and support modern accounting practice.

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.



2026 Future Ready Accounting Series

This professional development series equipped young accounting professionals with the skills and mindset needed to succeed in an evolving business environment. Through discussions on digital transformation, artificial intelligence, and emerging technologies, participants gained insights into the trends reshaping the profession and explored their impact across industries, including public accounting. Featuring industry leaders and subject matter experts, the series encouraged innovation, broadened perspectives, and helped participants prepare for future opportunities in accounting and business leadership.

2026-02-11

CPAC Enlight Collaboration: Young Enterprise Accountants Series: New Generation of Accountants

Speaker

David Tang Senior Manager, Risk Consulting, KPMG
Lynn Qiao CPA, Associate Director, MUFG Investor Service
Frank Lyu Financial Analyst, Alternative Investment, OPTrust

This webinar explored career preparation for the next generation of accounting professionals in a digital environment. Participants examined the role of AI, data analytics, and automation in accounting and investment operations. Attendees gained valuable insights into building technical capabilities and adapting to emerging industry trends.

2026-02-25

CPAC Enlight Collaboration: Young Enterprise Accountants Series: AI and the Future

Speakers

Hassan Mahmood Manager in Deal Advisory, Operations M&A, KPMG
Jessie Li Tax Manager, Doane Grant Thornton LLP

This webinar explored practical AI applications across consulting and tax functions. Participants examined how AI supports deal advisory, due diligence, and cross-border tax work. Attendees gained valuable insights into leveraging technology to enhance competitiveness and advance their careers.

2026-03-11

CPAC Enlight Collaboration: Young Enterprise Accountants Series: Data and AI

Speakers

Elaine Han CPA, Assistant Controller, GE Healthcare
Grace Lin CPA, Canadian Segment IT Finance Manager, Manulife
Jenny Peng CPA, Senior Manager, Finance & Business Solutions, People Corporation

This webinar explored the evolving role of corporate accountants in a digital landscape. Participants examined financial planning, reporting, and performance management within large organizations. Attendees gained valuable insights into strengthening analytical skills and improving corporate finance processes.

2026-03-25

CPAC Enlight Collaboration: Young Enterprise Accountants Series: Young Professionals' Career Preparation

Speakers

Lynn Qiao CPA, Associate Director, MUFG Investor Service
Nico Yuan CPA, CA, CFA, Senior Manager, Global Accounting Policies & Procedures, Scotiabank

This webinar explored accounting careers in the financial services sector. Participants examined fund accounting, financial reporting, and accounting policy practices. Attendees gained valuable insights into developing technical expertise and navigating industry changes in an AI-driven environment.

L E A D E R S H I P

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.

2026-08-15

Chat Smarter - Practical Small Talk Skills for Professionals



Speakers

Xin Sun Principle Lawyer of XS Law Professional Corporation

This seminar explored the role of small talk in building professional relationships and confidence in the workplace. Participants learned practical networking techniques and tips for starting conversations, engaging with others, and building meaningful professional connections. The session concluded with a networking session, allowing attendees to practice their small talk and networking skills in a supportive environment.

2026-08-29

Beyond Compliance: Ethical Leadership in Practice

Speakers

Allen Yao CPA, CA, CFA, CIRP, Partner and Senior Vice President, Strategy and Transactions, EY
Grace Wang MBA, CPA, CMA, VP Finance and Operations, Bousfields Inc.
Jerom Yu CPA, MBA, Chief Financial Officer, Xodus Travel Services Inc.
Michelle Zhang Partner, International Tax Services, Deloitte

This panel discussion brought together senior executives and professional leaders to explore ethical leadership beyond compliance. Participants examined ethical challenges related to AI and emerging technologies, professional judgment under business pressures, and the complexities of making principled decisions in ambiguous situations. The session supported Ethics CPD learning while encouraging meaningful reflection and discussion.

Volunteer Rotation Program

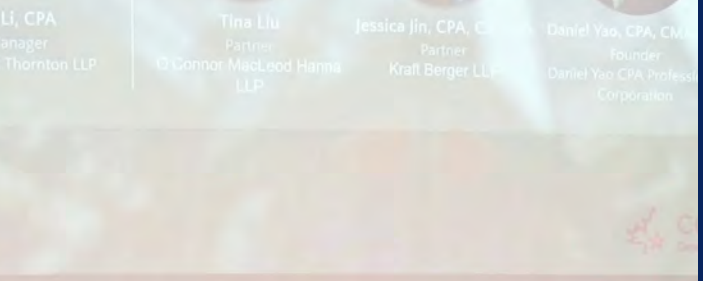
Join us for professional development, leadership skills, and for fun! Volunteers will have the opportunity to rotate through all operations departments (e.g., Business Development, Communication, Public Relations, Administration).

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!



CPA Career Day

Shaping Futures, Shaping Success



2026-06-13

Professional Collaboration with CPA Ontario

Keyote Speaker

Bo Yuan CPA, Vice-President, Global External Reporting, Great-West Lifeco Inc.

CPA Ontario representative

Robin Clarke Career Partnership Specialist, CPA Ontario

Panelists

Jessica Jin CPA, CA, LPA, Partner, Kraft Berger LLP

Mary Joy (MJ) Paulo CPA, Senior Finance Controller, AsKiyKo Inc.

Taiwo Oretuga CPA, Assistant Controller, Motorcade Industries Inc.

Lorraina Lu Investment Banking Associate, National Bank of Canada

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

Info Session for International Trained Professional

The event provided internationally trained accounting professionals with valuable guidance on achieving CPA Ontario membership, offering a clear overview of the assessment process and available qualification pathways. Through a collaborative session hosted by CPA Ontario and CCPAA-ON, participants gained practical insights into leveraging their international credentials and experience to advance their careers and expand professional opportunities in Canada.

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

N E T W O R K I N G

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

Startup Series Collaboration with ID8 Ventures

In 2026, we continued our collaboration with ID8 Ventures through the Startup Series, delivering practical insights and strategic guidance to entrepreneurs and professionals supporting the startup ecosystem. The series focused on helping founders navigate critical stages of the startup journey, from establishing a strong foundation to scaling sustainably and preparing for long-term success.

- Early-stage foundations – understanding the key building blocks of a startup, including business model validation, market positioning, operational planning, and strategies for launching with confidence.
- Valuation & investment readiness – exploring the drivers of startup valuation, investor expectations, funding considerations, and approaches to building enterprise value.
- Exit planning & value creation – examining common exit strategies, succession and acquisition planning, and how founders can align strategic decisions with long-term value realization.
- Navigating turbulence to growth – addressing challenges such as market uncertainty, cash flow management, operational scaling, and leadership resilience while pursuing sustainable growth.
- Through this collaboration, CCPAA-ON and ID8 Ventures continued to support entrepreneurs by providing relevant, practical knowledge and fostering connections between startup founders, industry advisors, and accounting professionals. The series helped participants strengthen their business acumen, improve investment readiness, and build greater confidence in navigating the evolving entrepreneurial landscape.



2026 Professional Career Development Forum & Job Fair

Organized by Chinese Alumni Associations (CCAA), Canada-China Economic Trade & Culture Exchange Promotion Alliance (CCEA), and Chinese Professionals Association of Canada (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.

2026 Young Professional Series: Future Ready Accounting

We partnered with Chinese Professionals Association of Canada (CPAC) Enlight to launch the Future-Ready Accounting Series, a professional development initiative designed to help young professionals navigate the rapid transformation of the accounting profession driven by artificial intelligence, digital innovation, and emerging technologies. By leveraging the strengths and networks of both organizations, the series connected participants with industry leaders and subject matter experts who shared practical insights on emerging trends, evolving career opportunities, and the future of work.

Through this collaboration, CCPAA-ON and CPAC Enlight fostered meaningful dialogue around innovation and career development while empowering the next generation of accounting professionals to embrace change, expand their professional horizons, and prepare for future leadership opportunities."

Fundraising

Making Waves for Autism

Hosted by the Canadian-Chinese Finance Association, CCPAA-ON and other professional associations walked through the City of Toronto to fundraise and to build a network between these organizations. Participants walked through the city on September 19th, raising funds for autism while building stronger bonds with other Chinese-Canadian professional in the city.

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

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Michelle Zhang Partner, International Tax, Deloitte
Winnie Wang CPA, MTax, Senior Manager, International Tax, Deloitte

2025-11-18 **Introduction to Canadian Inbound International Tax**
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Angel Tong CPA MTax, Senior Manager, International Tax, Deloitte

2026-01-27 **Preparing for a Successful Year-end Audit**
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Frank Lyu Financial Analyst, Alternative Investment, OPTrust

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2026-03-26 **Finance in the Banking Industry**
Nicholas Qin CPA, Senior Manager, Finance at National Bank Financial

2026-04-07 **Canadian Income Tax Update**
Henri Klein CPA, CA, Senior Manager, Tax, KPMG
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2026-05-31 **Startup - Early Stage ID8: Exit Plan**
Jeff Ng Managing Director, Corporate Finance, MNP

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Jessica Jin CPA, CA, LPA, Partner, Kraft Berger LLP
George Hsu Product Manager, Toronto Branch Manager, Enoch Wealth
Daniel Yao CPA, CMA, MBA, Founder, Daniel Yao CPA Professional Corporation

2026-09-27 **Common AI tool and how to use it effectively**
Loewe Ke Founder and CEO, KE Solutions and Jobster.io

2026-10-20 **Webinar: Tax Dispute Update**
Dean Blachford LLB, BCL, Tax Lawyer, Blachford Tax Law
Ella Sui Law Clerk & Office Manager, Blachford Tax Law

Mia Ma

Jessica Jin

Kam Gan

Lynn Qiao

Dongsheng Wang

Gabriella Lu

Andy Ma

Linda Liu

Moby Sun

Pennie Zhao

Lei Wu

Cindy Liu

Effy Gong

Marco Li

Phyllis Li

Ivy Yang

Yi Shang

Nicholas Qin

Sophie Chen

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

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

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

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



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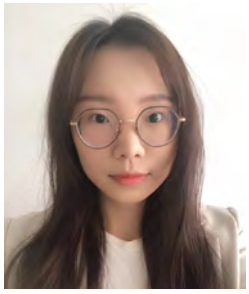
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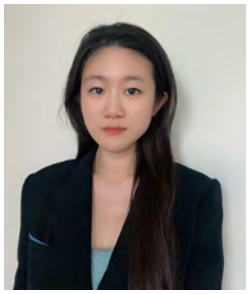
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Volunteer Engagement Coordinator



Moby Sun
Community Engagement Coordinator

CCPAA-ON **18th Annual Conference**

Energy in Motion: Cross-Border Expansion, Tax and Reporting

Energy has moved to the centre of today's economic shifts. Surging electricity demand, driven by artificial intelligence and data centres, electrification, and EV adoption, is colliding with oil price volatility, evolving trade flows, and a global wave of cross-border investment. In Canada, governments and businesses are responding with major investments in data centre capacity, nuclear and small modular reactors (SMRs), and clean energy infrastructure. At the same time, enterprises expanding across borders must navigate complex tax, financial reporting, operational, and governance realities.

CCPAA-ON's 18th Annual Conference will examine these forces from multiple angles, including macroeconomic and policy trends, tax and structuring, financial reporting, operational execution, and governance.

Agenda

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

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

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

Jerom Yu CPA, MBA, Chief Financial Officer, Xodus Travel Services Inc.

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

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

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

10:00 – 11:00 **Macro Overview: Energy Sector Dynamics & Canada's Energy Landscape**

Edmund Tam Director, Model Development and Analytics, Ontario Power Generation

Overview of the dynamics reshaping Canada's energy sector, from oil-price swings and EV adoption to the AI-driven data-centre boom increasing electricity demand. Explore Canada's clean electricity response and investment push: data centre growth, SMRs and nuclear power, and the grid infrastructure and clean energy capacity needed, alongside opportunities and constraints across provinces.

Using Ontario examples, the session will examine how these trends are influencing electricity system planning and how planners and decision-makers can align demand, supply, and infrastructure over the long term while managing uncertainty, enabling economic growth, and balancing reliability, affordability, and decarbonization.

11:00 – 11:45 **Navigating Ethical and Governance Considerations in Cross-Border Energy and Infrastructure Investments**

Mary Joy (MJ) Paulo CPA, Senior Finance Controller, AsKiyKo Inc.

- ESG expectations and regulatory compliance
- When the Numbers Tell Only Half the Story: Transparency, Greenwashing & Reporting Integrity
- Profit, Purpose & Pressure: Making Responsible Decisions When Commercial Interests Collide with Sustainability
- Beyond the Numbers: The CPA as a Strategic and Ethical Advisor

11:45 – 12:45 **Lunch & Networking**

12:45 – 13:30 **Know Your Business: Tax Considerations for Growth and Investment**

Glendy Cheung CPA, CA, Senior Manager - Tax, KPMG

Practical tax considerations arising from business growth and investment, such as:

- Business structures, ownership models, and tax considerations
- Tax and regulatory considerations for rate-regulated businesses
- Capital investments, CCA developments, and available tax incentives
- Financing decisions and EIFEL considerations
- Investing across jurisdictions and related tax considerations
- Global Minimum Tax considerations for growing enterprises
- Tax reporting, compliance, and governance considerations

13:30 – 14:15 **Financial Reporting Implications across the Energy Sector**

Russell Sweeney CPA, Senior Manager - Accounting Advisory Services, KPMG

Accounting and reporting challenges across the energy sector, such as:

- Government grants, subsidies, and investment tax credits, including clean-technology / SMR credits (IAS 20)
- Asset impairment, useful lives, and lifecycle valuation (including battery and equipment)
- Revenue recognition for energy and bundled-service arrangements – PPAs, capacity contracts, and V2G (IFRS 15)
- Asset capitalization, componentization, and classification (generation, data-centre, and energy assets)
- Decommissioning and asset retirement obligations (e.g., nuclear / SMR, oil & gas, and battery assets)

14:15 – 15:15 **Executing Trade & Investment Strategies for Canada**

Hannibal El-Mohtar Counsel, Global Trade, EY Law LLP

Janet Zhu Partner, CFA. FRM, ACCA, Transactions & Corporate Finance - Valuation, Modelling & Economics, EY Parthenon

Challenges in executing cross-border expansion strategies, such as:

- Investment screening, incentives, and regulatory approvals
- Customs, trade remedies, and supply chain considerations
- Operational and geopolitical risks
- Stakeholder expectations: governance and cultural alignment

15:15 – 15:45 **Coffee Break & Networking**

15:45 – 16:30 **Panel Discussion**

Moderator

Jessie Li Tax Manager, Doane Grant Thornton LLP

Panelists

Edmund Tam — Russell Sweeney

Glendy Cheung — Janet Zhu

Jerom Yu



Jerom Yu, CPA, MBA, is a distinguished finance professional with over a decade of expertise in corporate governance, financial management, and business intelligence across various industries. Currently, he serves as the Chief Financial Officer at Xodus Travel Services Inc., where he oversees the strategic and operational aspects of finance, accounting, business intelligence, human resources, recruiting, and IT/IS.

Previously, Jerom was the Director of Finance at ProNavigator and the Vice President of Finance and Human Resources at LowestRates.ca, where he also spearheaded business intelligence initiatives. Jerom holds an MBA from the University of New Brunswick and a CPA designation from CPA Ontario. He is also actively involved in the community, serving on the boards and committees of several local non-profit organizations, including the Rexdale Community Health Centre and the Vaughan Community Health Centre.

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.

Edmund Tam



Edmund Tam is Director, Model Development & Analytics at Ontario Power Generation (OPG), the province's largest electricity generator, with 25 years of experience in Ontario's electricity market. His career spans business planning, business development, and strategy. He leads a team of energy modellers who forecast demand, plan and evaluate new supply, and stress-test scenarios to navigate uncertainty while balancing reliability, affordability, and decarbonization. Their work guides OPG's growth strategy and, through stakeholder engagement with the Independent Electricity System Operator (IESO), helps shape Ontario's electricity future. Edmund holds a BASc in Industrial Engineering from the University of Toronto.

Mary Joy (MJ) Paulo



MJ is a Senior Finance Controller with over 15 years of broad end to end strategic financial leadership. She currently works at AsKiyKo Inc. — a data analytics company focused on helping organizations achieve sustainability and energy efficiency goals through actionable insights and accessible Energy Savings Goal (ESG) reporting. Her CPA background has been a key foundation of her success, strengthening her ability to lead with accuracy, integrity, and sound financial judgment throughout her career. In addition, which shaped her discipline, analytical mindset, and commitment to excellence.

Glendy Cheung



Glendy Cheung is a Senior Manager in KPMG's Canadian Tax practice with extensive experience in corporate tax, tax accounting, and compliance gained through both professional services and industry roles. While her primary focus is the utility and energy sector, she has advised clients across a broad range of industries on tax, regulatory, and reporting matters. Glendy spent 10 years working at two large Canadian utilities, providing her with a practical industry perspective on the challenges facing the sector. She has supported two major Ontario Energy Board rate applications, including providing tax witness support in regulatory proceedings. She advises organizations on the tax implications of capital investments, business growth, regulatory matters, and emerging tax legislation.

Russell Sweeney



Russell is a senior manager in KPMG's accounting advisory services group, specializing in complex transaction accounting and financial reporting advisory for clients reporting under US GAAP and IFRS. Russell has over 7 years of experience advising organizations on the implications of complex accounting implementations and transactions across a variety of industries including energy, real estate, mining, pensions and private equity.

Hannibal El-Mohtar



Hannibal is Counsel with EY Law LLP's Global Trade Team. He advises on international trade, CITT proceedings and Investment Canada Act national security reviews. Hannibal has practised in Toronto, Beijing and Ottawa; he also served in the Canadian Armed Forces, retiring as Captain. Hannibal supports APAC clients across multiple sectors and speaks Mandarin and French. In his volunteer roles, Hannibal sits on the CBA's Foreign Investment Review Committee and serves as a Director of the Hong Kong-Canada Business Association (Ottawa).

Janet Zhu



Janet is a partner in EY with over 25-year experience in valuation, financial modeling, and other transaction-related advisory areas. She brings deep technical expertise and extensive cross-border experience, having worked across multiple jurisdictions including China, Singapore, and Canada. Her multinational background enables her to advise clients on complex valuation matters in diverse regulatory, accounting, and transaction environments.

Janet has extensive experience advising companies on a wide range of strategic, investment, and valuation matters across domestic and cross-border contexts. Her work has included valuation support for outbound investments, helping clients assess target businesses and investment structures in overseas markets.

Mingyu Chu MC



Mingyu is a Toronto-based Deal Advisory professional specializing in mergers & acquisition, value creation and operational performance improvement. She works with senior leadership teams, private equity investors, and corporate stakeholders to identify cost optimization opportunities, drive strategic initiatives, and enhance enterprise value during critical business transitions. Her experience spans financial modeling, synergy assessment, standalone cost analysis, and operational due diligence. Mingyu has supported complex carve-outs, integration planning, and performance transformation projects across multiple industries, helping organizations translate data-driven insights into actionable strategies.

Sean Song MC



Sean is a software engineer at Ideogram, a Toronto-based generative AI company building state-of-the-art AI models and products for image generation and creative workflows. His work focuses on leading engineers, building AI-powered products and implementing solutions for enterprises. Prior to Ideogram, Sean worked at companies including Amazon and Huawei, contributing to a range of product, AI, and infrastructure projects. He first connected with CCPAA while exploring the opportunity to build a startup in the accounting technology space, which sparked his interest in how AI can improve accounting workflows and create new opportunities for businesses and professionals.

Jessie Li Moderator



Jessie Li is a Tax Manager at Doane Grant Thornton LLP with four years plus of professional experience since graduating from McMaster University, specializing in multinational tax compliance and cross-border matters. In her current role, she works closely with global clients to navigate international reporting and regulatory requirements while delivering practical, business-focused tax solutions. Outside of her professional work, she enjoys relaxing time with close friends, or solitary activities such as playing musical instruments and hiking.

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