



Convention 2019

**Friday January 25 –
Saturday January 26, 2019**

Included in this Registration Package
Convention Agenda
Registration Form

REGISTRATION DEADLINE September 30, 2018



The PBA Society of Canada is pleased to announce that the 2019 Convention will take place at:

**Omni Orlando Resort at ChampionsGate
1500 Masters Blvd. ChampionsGate, FL 33896**

We have a small block of rooms at a rate of \$235.00 (double occupancy) + \$10.00 Resort Fee plus applicable taxes.

To book please click the link;

<https://www.omnihotels.com/hotels/orlando-championsgate/meetings/pba-canada>

Professional Business Accountants' Society of Canada
#206, 10544 – 106 Street, Edmonton, Alberta T5H 2X6
www.pba-canada.org

Ph:780-448-9692
Fx: 780-448-9698

Meet Our Presenters



Marcel Godbout, CPA, PBA – Bishop & Company

Marcel is a Saint Mary's University grad and received his CA designation in 1996. He is a tax specialist and joined the Firm in 2008 with over 25 years' experience in providing financial advice and business counsel to clients from a wide range of industries.

Originally from Quebec, Marcel is raising his young family in the Valley and has been an active volunteer with the Wolfville Business Development Corporation. Marcel sits on the CPA Canada SMP Tax Committee. Marcel advises clients in estate and succession planning, corporate organization and effective tax planning strategies tailored to meet their specific requirements.



Michael Barbera – Barbera Solutions

Michael Barbera is an award-winning consumer psychologist and strategy consultant for Fortune 50 companies. He is a business psychologist who is involved in both practical and academic endeavors. His areas of practice are consumer behavior,

consumer emotions, social psychology, decision-making, brand management, marketing, and long-term business strategies. Michael is currently employed as the CEO of Barbera Solutions. His clients can be found on the Fortune 50 list and several television programs show as ABC's Shark Tank and Bravo's Million Dollar Listing. Michael shares his research and experiences as a keynote speaker for public and private organizations, as the host of the Clicksuasion podcast, and twice for TED to discuss human perception of gender-neutral restrooms. In 2015, the White House recognized Michael for his contributions to entrepreneurship. This work includes development and validation of consumer emotions, consumer behavior, product placement, consumer experiences and business growth strategies.



Jamie McDonald, BA, MBA – Hubdoc

Jamie McDonald is the co-founder and co-CEO of Hubdoc where he focuses on product direction. Prior to Hubdoc, he was the founder and CEO of Sparkroom and an Internet 1.0 employee at Expedia. Jamie has a BA in Economics from Duke University and an MBA from Northwestern University.



Rod Burylo, CIM, FCSI – Medallion Health

Rod Burylo is a serial entrepreneur with 30 years of experience in all major sectors of the financial services industry. He has served in a wide range of roles – including Chief Compliance Officer and National Marketing Director – and has earned CFP and CIM designations. He is a recipient of a Canadian Advisor of the Year Award, and has recently been acknowledged as a Fellow of the Canadian Securities Institute. Rod currently serves as Director of Business Development, Western Canada, for Croft Financial Group, and as a private equity specialist on that firm’s investment review committee - which manages over \$700 million in assets. Rod serves as Director and Board Advisor for public and private companies, and volunteers as a Director of the Foundation for the Advancement of Entrepreneurship, which provides scholarships to students of Junior Achievement.

Rod is a business author, international speaker, and currently designs and delivers the mandatory ethics class for CFP designation holders. His books include “Awesome Client Events (2001)”, and “More Awesome Client Events (2011)”, and he has been speaking and consulting internationally on client relationship topics for over 20 years.

Today Rod will be discussing the importance of client relationships with a focus on attraction, building, and termination strategies, in a world of technology.

AGENDA

| Friday January 25, 2019 | |
|-------------------------|---|
| 7:45 am – 8:30 am | Breakfast & Registration |
| 8:30 am – 10:00 am | Marcel Godbout, Bishop & Company Tax Updates & Changes |
| 10:00 am – 10:30 am | Coffee Break |
| 10:30 am – 12:00 noon | Michael Barbera, Barbera Solutions Succession Planning: How to Build Your Business for Merger and Acquisition |

| Saturday January 26, 2019 | |
|---------------------------|---|
| 7:45 am – 8:30 am | Breakfast & Registration |
| 8:30 am – 10:00 am | Jamie McDonald, Hubdoc Introduction to Hubdoc – Document Collection & Management Software |
| 10:00 am – 10:30 am | Coffee Break |
| 10:30 am – 12:00 noon | Rod Burylo, Medallion Health How to Relationship Build Your Business |

**PLEASE NOTE: The agenda is subject to change.
Full CPE credits (7 formal per day) will be earned.**

PBA Convention 2019

REGISTRATION FORM

(prices do not include GST)

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| Registration Price includes Friday & Saturday breakfast, coffee break and all educational sessions. <u>All other meals are the responsibility of the registrant.</u> | | \$595.00 CDN (member) \$695.00 CDN (non-member) |
| Payment Method Please make cheques payable to "PBA Society of Canada" | | |
| Cheque (Enclose with registration form) | Cheque, Etransfer or Visa/MC/AMEX via PayPal using email: admin@pba-canada.org | |
| Registrant Personal Information | | |
| First & Last Name: _____ | _____ | Member # _____ |
| Address: _____ | | |
| Phone: _____ | Email: _____ | Fax: _____ |
| Food Allergies: _____ | | |

Please return completed form VIA

EMAIL, MAIL or FAX

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