



Convention 2018

**Thursday September 27 –
Friday September 28, 2018**

Included in this Registration Package
Convention Agenda
Registration Form

REGISTRATION DEADLINE September 10th, 2018



The PBA Society of Atlantic is pleased to announce that the 2018 Convention will take place at:

JAG Boutique Hotel

115 George Street West St. John's, NL A1C 0B7

We have a block of 30 rooms at a rate of \$179.00 plus taxes. Group name: Professional Business Accountants

Call 1-844-564-1524

Rate and rooms will be held until August 25, 2018

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

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

Meet Our Presenters



Colin Sullivan – Sullivan Law & Tax

I am the operator of a niche law practice providing tax and estate planning services to high net worth individuals, professionals and business owners.

I give each client the attention they require to guide them through the many financial and tax related items they need to reflect on to accomplish their objectives. My philosophy is that “good tax advice is individual in nature and an integral part of each person’s financial goals”. This allows the client to focus on growing their enterprise, while having their corporate and personal tax needs met by a professional who is in tune with their objectives.

Each client is encouraged to have a proper estate plan and Will in place to protect their family and their hard-earned equity.

In addition to a Bachelor of Commerce (Co-Op) and Law Degree, I have completed CPA Canada’s In-Depth Tax Course (Parts I, II and III) and currently instruct various courses for CPA-NL, including Purchase and Sale of a Business and the Taxation of Domestic Trusts.



Chad Peters – m5 Group of Companies

Chad Peters is Vice President, Business Development with the m5 Group of Companies, Atlantic Canada’s largest integrated marketing communications company. In this role he helps companies, organizations and governments deliver value to their various publics through marketing communications programs, research and public opinion polling and public & community relations efforts.

Over the past 20 years, Chad has held senior roles with various national and international companies in a variety of sectors including energy, retail, community economic development and manufacturing. Prior to joining m5, Chad led SWN Resources Canada’s oil and natural gas exploration program in New Brunswick.

As a strategist, Chad has extensive experience in corporate communications, policy development and crisis management. With a unique insight and knowledge of how governments work and relate to the publics they serve, Chad has provided strategic counsel to a number of clients throughout Canada and the United States.

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Chad holds a Bachelor of Arts (Political Science) from University of New Brunswick and diplomas in Corporate Communication and Marketing Management from Centennial College.

A proud Monctonian, Chad is active in his home community as a member and Part-President of the Rotary Club of Moncton and is a member of the board of directors of the Atlantic Chamber of Commerce, the Food Depot Alimentaire and the YMCA of Greater Moncton.



Tracey Stephenson – m5 Group of Companies

Tracey Stephenson is Vice President, Account Services with the m5 Group of Companies, Atlantic Canada’s largest integrated marketing communications company. Tracey is responsible for oversight on all client accounts in the Atlantic Provinces. She has over 15 years of experience in public relations – managing large national and international clients.

She has worked both sides of the business including client management and internal agency production. An in-depth knowledge of these two disciplines makes Tracey the ideal person to provide senior account leadership.

Tracey has worked with many clients in the public and private sectors specializing in the mining and natural resources sector. Tracey provides expert counsel in strategic and corporate communications, issues management and crisis communications including media messaging and coaching for high-pressure situations.

Over the last two years, Tracey and her team have worked with numerous clients to develop and execute comprehensive public engagement programs.

When not in the office, Tracey volunteers her time with youth minor sports associations and has supported and advocated for numerous literacy initiatives in the province.



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 15 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 Norton – TD Commercial Banking

Michael Norton is a Manager of Cash Management at TD. He previously held positions of District Manager - Strategy and Sales, Manager - Customer Service and Sales and Branch Manager with TD.

Michael received his Bachelor of Commerce Degree with certificates earned in Financial Services and Human Resources Management from Nipissing University. He was awarded the President's Gold Medal for highest academic average in the BCOMM program.

Michael has also earned the Summit Award and the Champions Club from TD.



Brian Pittman – TD Commercial Banking

Brian Pittman is a Relationship Manager at TD. He previously held positions of Vice-President – Financing & Consulting, Business Centre Manager, Area Manager – Underwriting & Portfolio Management and Senior Account Manager with BDC.

Over 15 years experience culminating in 4 years Vice President experience in sales leadership, performance management, employee development, and the building of both employee and client engagement.

Brian received his Bachelor of Commerce Degree from Mount Allison University

In Brian's spare time he enjoys coaching minor hockey and baseball.



Peggy Gates-Hammond – BMO Wealth Management

Peggy is Director, Tax Planning at BMO Wealth Management.

In her role at BMO Private Banking, she uses her unique combination of interpersonal skills, experience and training to guide families through the emotional and technical aspects of wealth planning. She works with financially successful Canadian families as well as their legal, tax and insurance advisors to develop customized strategies for achieving goals.

In her career, which spans more than three decades, Peggy had worked extensively in the areas of tax and estate planning.

Peggy is a Chartered Accountant, Certified Financial Planner, Trust and Estate Practitioner, and holds a Business degree from Saint Mary's University. She had completed the in-depth income tax training through the Canadian Institute of Chartered Accountants and Family Council Facilitation Training through The Canadian Association of Family Enterprise.



Brodie Taylor – BMO Wealth Management

Brodie is Director, Wealth Planning at BMO Wealth Management.

As Director of Wealth Planning he is responsible for understanding client's goals while developing a wealth plan that considers their current financial needs and objectives for the future.

His background enables him to provide insight and advice on Trust & Estate Planning, Business Succession, Tax Planning and Philanthropy.

Brodie assists high net worth clients, professionals and entrepreneurs to achieve their personal goals through the development of a comprehensive wealth plan.

Brodie has his B.Comm from Memorial University, earned his CPA, CA and completion of the CPA in depth tax program.



George Warren – EFILE Association of Canada

George is the President of the EFILE Association of Canada and has been on its board of directors for 25 years.

He is also the President of G.W. Tax & Accounting Ltd. He offers a general accounting and business advisory practice.

George also serves as a board member of the Torbay Kinsmen Manor for Seniors, is Vice President for NL of PBA Atlantic Canada and is a Director of PBA Canada.



Don Sweetapple – Sweetapple Accounting Group Ltd.

Don is the President of Sweetapple Accounting Group Ltd. He has been providing accounting and business advisory services to the fishing industry of NL and the Gander and area business community for 36 years.

He also provides valuation services for the fishing industry to Legal advisors for litigation, Trustees in Bankruptcy, Accountants, Banks and other Financial Institutions.

Don is a member of the Rotary Club of Gander, a board member of Fraser Road United Church Gander and a director of PBA Atlantic.



Linda Sweetapple – Sweetapple Accounting Group Ltd.

Linda is the Business Manager of Sweetapple Accounting Group Ltd. She has been in this position since 1999 and has overseen the restructuring of this firm's operations during this time. As an organizer and planner and with a major in psychology she is well equipped to manage an accounting practice and its staff.

Linda is a past director of the Gander and Area Chamber of Commerce and volunteers in the Palliative Care Unit of James Paton Memorial Hospital, Gander.

AGENDA

Wednesday September 26, 2018	
7:00 pm	Meet and Greet Reception

Thursday September 27, 2018	
8:30 am – 9:00 am	Convention Registration and Welcome
9:00 am – 10:15 am	Colin Sullivan, Sullivan Law & Tax Basket of Tax Planning Ideas
10:15 am – 10:30 am	Coffee Break
10:30 am – 11:45 am	Chad Peters & Tracey Stephenson, m5 Group of Companies Government Relationships and Advocacy
11:45 am – 1:00 pm	Lunch Break
1:00 pm – 2:15 pm	Marcel Godbout, Bishop & Company Tax Updates, Changes and News Events
2:15 pm – 2:30 pm	Coffee Break
2:30 pm – 4:00 pm	Marcel Godbout, Bishop & Company Tax Updates, Changes and News Events
4:00 pm – 4:15 pm	AGM Registration
4:15 pm – 5:00 pm	PBA Atlantic Annual General Meeting
6:30 pm	President's Banquet, Annual Awards

AGENDA

Friday September 28, 2018	
9:00 am – 10:15 am	Michael Norton & Brian Pittman, TD Commercial Banking Cash Management Services, Commercial Lending and Full-Service Offering
10:15 am – 10:30 am	Coffee Break
10:30 am – 11:45 am	Peggy Gates-Hammond & Brodie Taylor, BMO Wealth Management Tax on Split Income (TOSI) Rules
11:45 am – 1:00 pm	Lunch Break
1:00 pm – 2:15 pm	George Warren, EFILE Association of Canada EFILE Association & CRA Updates
2:15 pm – 2:30 pm	Coffee Break
2:30 pm – 3:45 pm	Don Sweetapple & Linda Sweetapple, Sweetapple Accounting Group Ltd. Discussion on Accounting Firm Operations and Practices
3:45 pm – 4:00 pm	Mark Reid, PBA Atlantic Canada Convention Concluding Comments

PLEASE NOTE: The agenda is subject to change.

REGISTRATION FORM

(prices do not include HST)

Package Selection			
Package A	Full Registration Price includes Thursday & Friday lunch, coffee breaks, all educational sessions and the President's Banquet on Thursday evening. <u>All other meals are the responsibility of the registrant.</u>	\$595.00 (member) \$695.00 (non-member)	
Package B	Partial Registration Price includes lunch, coffee breaks and one day educational sessions. <u>Excludes President's Banquet.</u>	Thursday or Friday (per day)	\$275.00 (member) \$325.00 (non-member)
Banquet Add-On	Partial Registrant: In addition to my partial registration, I would like to attend the President's Banquet.	YES NO	\$60.00 Please add this charge if selected Package B
Banquet Guest Add-On	All Registrants: I would like to register an additional guest for the President's Banquet. Name of Guest: First: _____ Last: _____	\$60.00 Please add this charge if selected Package A or B	
Payment Method <i>Please make cheques payable to "PBA Society of Atlantic"</i>			
Cheque (Enclose with registration form)	Visa/MC/AMEX via PayPal using email: adminATL@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