

## AGENDA SUBJECT TO CHANGE WITHOUT NOTICE – September 12, 2019

---

### *“Raising The Bar” – ATAP Fall 2018 Seminar Agenda*

<b>Saturday September 29, 2018</b>		<i>Subject to change without notice</i>
<b>8:00am</b>	<b>Breakfast is Served ...</b> Breakfast is available in the Riverview Dining Room located at the resort.	
<b>9:00am</b>	<b>Welcome and Opening Comments</b> Master of Ceremonies – Frank Arnold	<b>Frank Arnold</b>
<b>9:10am</b>	<b>Estate Freezes and Trusts – The How and Why</b> Estate Freezes and Trusts remain a strategy that every accountant should be considering in providing advice to their clients. Learn why they remain important and the impact of recent changes on these strategies. Know the risks in implementing these strategies and how to avoid unhappy endings.	<b>ATAP Director</b> <b>Walter Williams</b> Vine & Partners LLP <i>Sponsored by:</i> <b>ATAP</b>
<b>10:15am</b>	<b>Corporate Asset Transfer Strategy.</b> <ul style="list-style-type: none"><li>• The ideal clients for this strategy</li><li>• The tax treatment of the corporately owned life insurance.</li><li>• How it can be used for the estate transfer purposes.</li><li>• How it compares to the corporately owned real estate investment.</li></ul>	<b>Vlad Solokhine</b> <i>Sponsored by:</i> <b>Lazar-Wealth</b> <b>Succession</b> <b>Strategies</b>
<b>10:30am</b>	<b>Stretch, Break &amp; Re-fuel</b> Refreshments available	
<b>10:45am</b>	<b>Cannabis in the workplace</b> Having a workplace drug and alcohol policy, which will be topical at the time as we head towards October 17th and the expansion of cannabis retail into edibles/topicals/vapables.	<b>Ryan Mallough /</b> <b>Chris Crowne</b> CFIB <i>Sponsored by:</i> <b>ATAP</b>
<b>11:45am</b>	<b>REMITR</b> The stress-free alternative to Wire Transfers	<b>Sandeep Todi</b> <i>Sponsored by:</i> <b>Remitr</b>
<b>12:00pm</b>	<b>Lunch is Served ...</b> Lunch is available in the Riverview Dining Room located at the resort.	
<b>1:00pm</b>	<b>Not for Profit Organization</b> At some point in time, every accountant and tax professional gets asked about not for profit organizations. This can begin with a question or your own involvement in NPO’s but misnomer is that NPO’s do not have to file returns. Nothing is further from the truth.  This session will deal with the differences between NPO’s and Charities as well as the “if, when and how’s” of filing the proper documentation so that the NPO remains onside and continues to retain their tax exempt status.	<b>Alan Rowell</b> The Accounting Place <i>Sponsored by:</i> <b>ATAP</b>
<b>2:15pm</b>	<b>Stretch, Break &amp; Re-fuel</b> Refreshments available	

## AGENDA SUBJECT TO CHANGE WITHOUT NOTICE – September 12, 2019

---

<b>2:30pm</b>	<b>Ministry of Labour Occupational Health and Safety Standards Requirements and Resources for Small Businesses</b> Reviewing what is required for Small businesses under the current Occupational Health & Safety regulations, along with resources to help employer's ensure that they are compliant	<i>Nicole Cote</i> Payroll Solutions <i>Sponsored by:</i> <b>ATAP</b>
<b>3:00pm</b>	<b>Recapping the Day &amp; Close</b> What's Next?	Frank Arnold  <b>ATAP Director</b>