



Message from the Chair

Greetings to all Sudbury Chapter CGAs and students!

Sudbury Chapter's 2000/2001 board of directors has a great slate of events planned for chapter members (CGAs and students) this year. The **Student/CGA Night** is scheduled for September 20, where we will welcome a special guest from CGA Ontario. Our annual Work & Play Weekend has 'grown up' and had its name changed to **Northern Summit**. This year, the Canadian Association of Financial Planners joins Sudbury Chapter in making the event the most exciting one yet. Indeed, the two groups are "Facing the Future Together," and bringing chapter members more seminars than ever before. Plan to attend this worthwhile three-day event, which begins on September 28, 2000, at Science North.

On October 20, 2000, Sudbury directors plan to travel to **Timmins** for our **annual meeting**. This opportunity allows us to meet and interact with local student and CGA colleagues, to discuss their thoughts and needs. Read more details about all of these events in this edition of *Northern Highlights*.

Best wishes to all students from Sudbury Chapter's board in regards to your studies and exams. It takes a lot of hard work and perseverance to succeed in the CGA program of professional studies, so hang in there! Please feel free to contact any director or me if you have any questions about the program or chapter/CGA Ontario operations. Every newsletter we publish contains a board of directors listing; please keep it handy, in case you need an answer or support. Here's a bit of advice from the board: you are encouraged to enrol in the lectures and attend the review sessions. (Usually they make completing the program much easier.)

Congratulations to our newest CGAs in the chapter—all of that hard work and determination has paid off. We hope to see you all in November at CGA Ontario's annual conference, past-forward.com. In particular, the admission to membership ceremony on Saturday, November 11, 2000, is an event you do not want to miss!

We encourage all CGAs and students to consider involvement at the chapter level. Please come out and support chapter events. Better yet, consider sitting on a chapter committee. Except for the trip to Timmins, board meetings are held in Sudbury. Please attend one of them if you are thinking about becoming involved or wish to learn more about your chapter.

I hope to meet many of you at the Student/CGA Night and/or the Northern Summit 2000 – "Facing the Future Together."

Rachelle Décosse, CGA
Chapter Chair



Student/CGA Night 2000

A reminder to all students and CGAs to seize the opportunity to network and organize study groups at Sudbury Chapter's Student/CGA Night 2000. We will welcome special guest, Sheila Shewchuk, senior program advisor, from the student services department at CGA Ontario. There is no charge for attending this event, and CGA Ontario Sudbury Chapter will provide assorted snacks.

The event is scheduled for Wednesday, September 20, at 7 p.m. The venue is Trevi's Tavern, located at 1837 Lasalle Blvd.

For more information, please call Ginnette Rouleau at (705) 566-7952 (leave a message).

Tax Preparation Services 2001

Once again the annual tax preparation service for seniors will be held at Pioneer Manor. The service is scheduled for March 2001.

Sudbury Chapter requires a slew of volunteers to complete the many tax returns, and to make this event as successful as those in previous years. If you are interested in helping out next March, please call Julie Coffin at (705) 671-2424.

Wine and Cheese Evening a Success

Did you know that in six provinces and two territories CGAs and CAs have the same access to public accounting licences?

On Thursday, January 27, 2000, approximately 30 CGAs and students gathered at the Four Points Hotel in Sudbury for an information session on the political action campaign.

Guest speakers who arrived in the frigid north to discuss this interesting topic included Richard Duffield, CD, MBA, CFE, CGA, governor, CGA Ontario; Ralph Palumbo, BA, LLB, CGA Ontario's director of government relations and legislative affairs; and Michael Low, manager of government relations.

The evening began with Richard presenting an overview of the current differences between CAs and CGAs, including why access to public accounting licences is important for CGAs. Next he advised those in attendance on ways and means for CGAs at the chapter level to increase public awareness about the licensing issue, including keeping your member of provincial parliament informed and involved.

Following Richard's presentation, Ralph Palumbo detailed CGA Ontario's political action strategies and briefly described recent events in the David Venn, CGA, court case. Lastly, Ralph discussed CGA Ontario's political mobilization task force and its goals in pursuing the licensing issue.

The evening ended with casual conversation and networking over light snacks and beverages.

Thanks are extended to Richard, Ralph and Michael for visiting Sudbury Chapter to update our membership on the importance of access to public accounting licences for CGAs.

Interaction 2000

This year's Interaction 2000 (CGA Ontario's annual training workshop for volunteer chapter officials) was held at the Delta Meadowvale Resort and Conference Centre in Mississauga.

The weekend was filled with great sessions and fun-filled social evenings. Friday night's dinner was followed by a plenary session, featuring CGA Ontario's 2000/2001 president, Michelle Causton, FCGA, who gave a remarkable 'performance.' Continuing in this theme, it was followed by Hollywood-themed reception, where delegates were introduced to many stars, such as Elvis Presley, Marilyn Monroe, Charlie Chaplin and Bonnie and Clyde, to name just a few. New chapter directors were issued an unofficial challenge to collect as many chapter pins as possible. This adventure, and other networking options, provided a great way to interact and speak with other directors from across the province and in the process exchange ideas on chapter events and initiatives.

Saturday was filled with sessions aimed at increasing our Association-specific knowledge in different areas, such as professional development, improving our volunteer efforts, issues in public practice, budgets, finance and administration, changes in the mandatory continuing education program and how to promote the program in the new millennium.

Saturday evening's enjoyment was supposed to include a poolside barbecue; however, the threatening weather put a damper on those plans. Luckily, no rain fell on everyone's good mood, as all CGAs and students in attendance had a great time. Pins continued to be traded. Before the evening concluded there was even a surprise proposal of marriage to one of our board members. Happily, Julie Coffin said 'yes' to her (now) fiancé, Allan Tatley.

Interaction wrapped up Sunday morning with a chance to assess ourselves. This came by way of a session led by Michael Tutor, on True Colours: Validating Differences, Creating Unity on the Chapter Board. Any expectations attendees had about the closing session were *surpassed* in the final analysis. Each session delegate was given the opportunity to see him/herself and others in different 'shades' of attitudes and personality traits. Recognition and appreciation of these commonalities and differences will help chapter directors and committee members to work better together over this year. (If you are interested in finding your True Colours, visit <www.truecolors.org>).

In my opinion, Interaction 2000 was a complete success...and I look forward to the possibility of attending next year's event.

Ginnette Rouleau
Education/Student Affairs/
Student/Member Night

Just a Thought...

If a word in the dictionary was misspelled, how would we know?

Steven Wright

AGM 2000

Sudbury Chapter's recent annual general meeting (AGM) was held at the Sudbury Downs on June 3, 2000. This event was a huge success, with an excellent turnout. Special guest included Jeannine Brooks, FCGA, 1999/2000 president of CGA Ontario, as well as incoming president for the 2000/2001 year, Michele Causton, FCGA.

During the course of the evening congratulations were offered to the newest CGAs in the 25-year membership club. Quarter century CGAs in attendance were presented with their CGA Ontario commemorative gift by Jeanine Brooks.



Everyone at the AGM ate well and had a fun time gambling. A blanket presentation was made on Race #5 to the winning horse with our logo on it.

Anyone with suggestions or comments for next year's annual general meeting, please contact Julie Coffin (preferably by e-mail at <juliec@isys.ca>). Suggestions will be discussed at future board meetings.

Attention All Students

Welcome to another prosperous academic year in the CGA program of professional studies.

While attending Interaction 2000, it came to my attention that a diskette was created to attempt to answer the many questions received by CGA Ontario administrative staff by students during any given academic year. There are approximately 100 questions and answers listed in these files, therefore too numerous to outline in this newsletter. These FAQs now are posted online in the secured Students section at <www.cga-ontario.org/newfiles/students/private/faqs/feature.htm>.

Alternatively, if you would like a copy of the file, please feel free to contact me via e-mail at <cobra@isys.ca> or <voices@on.aibn.com>, and I will forward an attachment for you to peruse at your leisure.

New to this Year

Calculators

Commencing with the December 2000 examination sessions, the CGA calculator is no longer required. Instead, students are permitted to use any calculator, as long as it is non-printing and silent, shows one display only, and does not include alpha keys.

Exam Deferrals

Greater flexibility has been approved for inclusion into the deferral policy. Students may now request:

1. An exam deferral to a session within the next two exam offerings.
2. An examination deferral for any reason; however, an exam may be deferred only once regardless of the circumstance, medical or otherwise.

Only one exception is provided for item (2):

- An exam deferral, due to illness on the day of the scheduled exam. However, a Deferral of Examination Request form must be completed and submitted no later than the Monday following exam week, and be sent in together with supporting documentation.

Good luck this year!

Colette Barrette
Education

Sudbury Chapter Northern Highlights

is published by the Certified General Accountants Association of Ontario, Sudbury Chapter.

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This newsletter can also be accessed via the Internet:
www.cga-ontario.org/newfiles/chapters/sudbury/newsletters.htm

Thank you to CGA Ontario's administrative staff for their assistance in the production of this newsletter.

Northern Summit

The **Certified General Accountants Association of Ontario, Sudbury Chapter** and the **Canadian Association of Financial Planners, Northern Chapter**, are co-hosting a professional development conference, **Northern Summit**. It is scheduled for September 28, 29 and 30, with the majority of the summit taking place at the Holiday Inn on Brady Street. This year's theme is "**Facing the Future Together**" (very appropriate, as certified general accountants join forces with financial planners).

The Northern Summit kicks into gear on Thursday, September 28 at Science North, with an opening session on "**Tools for Effective Public Speaking and Media Relations**" with **Meg Hogarth**, a media consultant and trainer.

Schedule for Friday, September 29:

Friday a.m.

7:45 to 8:45 a.m.

Keynote Session

Raymond McFeetors, president and chief executive officer
The Great West and London Life Assurance Companies
Financial Services Industry in the 21st Century

8:45 a.m. to 12 noon

Duncan MacPherson

Duncan MacPherson & Associates
Competitor-Proof Your Clients & Stimulate More Referrals

8:45 to 10:15 a.m.

Jeffrey Brown

CI Mutual Funds
Tax Advantage Investing

10:30 a.m. to 12 noon

Bill Ramsay

Albanese Financial
Managing the Departure of Retiring Business Owners

8:45 a.m. to 12 noon

Tom McCallum, CBV, FCGA

Estate Freezes

Friday Lunch

12 noon to 1:30 p.m.

Sandra Foster, CFP, CIM, RFP, CHRP, TEP, FSCI

CaratConnect
Author of two national best-sellers,
You Can't Take It With You: The Common-Sense Guide to Estate Planning for Canadians
and
Make the Most of What You've Got: The Canadian Guide to Managing Retirement Income

Friday p.m.

1:45 to 5 p.m.

Brian Gatien, B.Comm., MBA, LL.B., CHRP

Gatien Braithwaite
Labour and Employment Overview

1:45 to 3:15 p.m.

Simon Lee, B.Comm., CA, CPA, CFP

Trimark Mutual Funds
AIM Funds

3:30 to 5 p.m.

Richard Fisher

AGF Groups of Funds
Managing Expectations in Manic Times

1:45 to 5 p.m.

Tom McCallum, CBV, FCGA

Butterfly Re-organizations

6:30 to 10 p.m.

Enjoy dinner catered by Poetz Pantry and blues band entertainment at Habanas
(known for its premium cigars, java and spirits).

Schedule for Saturday, September 30:

Saturday a.m.

- 8:30 to 11:45 a.m. **Christopher Hutchenski**
Isys Technology Inc.
E-Commerce
- 8:30 to 10 a.m. **John Della Bosca, CFP, RFP**
Investors Group
Mediation & Conflict Resolution – With Relation to Gerontology
- 10:15 to 11:45 a.m. **Joe Svorinic, BA**
Mackenzie Financial Corporation
Managed or Indexed Mutual Fund? A Strategic Analysis
- 8:30 to 11:45 a.m. **Glen Schmidt, BA, FCGA**
GTS Seminars
Corporate Income Tax Review

Saturday Lunch

- 11:45 a.m. to 12:30 p.m. Buffet Lunch
Richard Duffield, CD, MBA, CFE, CGA
BMCI Consulting Inc.
Government Affairs Update for CGAs and Students

Saturday p.m.

- 12:30 to 2 p.m. **Gerry Labelle**
The Angelis Group
Goodbye Age of Reason, Hello Age of Chaos
- 2:15 to 3:45 p.m. **Richard Duffield, CD, MBA, CFE, CGA**
BMCI Consulting Inc.
Fraud Awareness for Seniors
- 12:30 to 2 p.m. **Mike McNaughton**
McNaughton Consulting Inc.
Retirement Lifestyle Planning
- 2:15 to 3:45 p.m. **Clint Maxwell, CIM**
Spectrum Investments
Using the Internet to Build Your Business
- 12:30 to 3:45 p.m. **Glen Schmidt, BA, FCGA**
GTS Seminars
Deferred Income Tax & New Cash Flow Statement
- 6 p.m. to 12 midnight **Enjoy dinner and an evening at Sudbury Downs**, where you can have your picture taken with a winning horse. Casino gambling and horse race betting available.

Plan to attend the Northern Summit...and bring a colleague or friend or two. You don't want to miss this event.

Registration prices for Northern Summit are as follows:

	Full Day/Modular	Full Weekend
Members	\$100	\$250
Students	\$75	\$225
Non-Members	\$125	\$275
Plenary Session	\$35	included
Social Events	\$35 each	included

Check out the brochure mailed in August for further Northern Summit details and a registration form. For more information contact Doreen Thompson at 525-7526 (B).

Don't delay! Registration ends September 15th and seating is limited!

Rachelle Décosse, CGA
Co-chair, Northern Summit

Sudbury Chapter Events

Keep this listing handy

Event: Student/CGA Night
Date: September 20, 2000
Location: Trevi's Tavern, Sudbury
Cost(s): Free
Contact: Julie Coffin
B: (705) 671-2424
R: (705) 524-1546
E-mail: juliec@isys.ca

Event: Northern Summit
2000
Date: September 28, 2000
to September 30, 2000
Location: Holiday Inn, Sudbury
Cost(s): Varied
Contact: Rachele Décosse, CGA
B: (705) 566-8829
R: (705) 566-1709
E-mail: rachcga@onlink.net

Event: Public Practice
Meetings
Date: Every third Thursday
of the month
Location: Boardwalk Café,
Sudbury
Cost(s): Responsible for own
meal

Contact: David Venn, CGA
R: (705) 693-0502
E-mail: dvvcga@cyberbeach.net

Event: Timmins Meeting
Date: October 20, 2000
Location: Senator Motor Hotel,
Timmins

Contact: Astrid Schmidt
B: (705) 264-1005
R: (705) 268-2114
E-mail: astid@ntl.sympatico.ca

Event: Professional
Development Seminar
Date: Late January 2001
Location: To be announced,
Sudbury

Cost(s): To be announced
Contact: Angela McCandless
B: (705) 560-7200
R: (705) 693-1712
E-mail: mccandle@vianet.on.ca

Event: Tax Preparation
Services
Date: March 2001
Location: Pioneer Manor, Sudbury
"We need volunteers"

Contact: Julie Coffin
B: (705) 671-2424
R: (705) 524-1546
E-mail: juliec@isys.ca

Event: Meet the Board Night
Date: March 21, 2001
Location: To be announced
Sudbury

Contact: Julie Coffin
B: (705) 671-2424
R: (705) 524-1546
E-mail: juliec@isys.ca

Event: Annual General Meeting
Date: May 26, 2001
Location: To be announced
Sudbury

Cost(s): To be announced
Contact: Julie Coffin
B: (705) 671-2424
R: (705) 524-1546
E-mail: juliec@isys.ca

Event: Board Meetings
**Tentative
Dates:** September 20,
November 29,
January 4, March 21
and May 23
Contact: Rachele Décosse, CGA
R: (705) 566-1709
E-mail: rachcga@onlink.net

OSC Conference

Each year the Ontario Securities Commission (OSC) sponsors an all-day conference designed to bring the staff of the Commission together with professionals from the financial services industry. This year, the event (held in Toronto) is being satellite broadcast to three other locations in Ontario (London, Sudbury and Ottawa). This initiative means that more professionals working in the financial industry can take advantage of the opportunity to attend, without having to travel a great distance. This is the first year the OSC is 'taking the event' out of Toronto.

Take advantage of the Sudbury satellite broadcast! For more information on this conference visit the secured Members section of CGA Ontario's Web site at <www.cga-ontario.org/newfiles/members/private/events/securities.htm>.

Northern Summit Correction

Due to a printing error in the Northern Summit brochure, Session J, Friday, September 29, 1:45 - 3:15p.m. is changed to the following:

Tax Planning Strategies

- learn how to make use of tax refunds
- learn how to split income with a spouse
- learn about the new rules that apply to employee stock options; and
- learn more about leveraged investing.

Speaker: Simon Lee, B. Comm., CA., CPA, CFP
Supervisor, Taxation
AIM Funds

Simon Lee received his bachelor of commerce degree from the University of Calgary. He joined AIM Funds in March 2000, bringing with him in-depth expertise in all areas of taxation. Prior to joining AIM Funds, he was in public accounting where he specialized in personal family trusts, and corporate tax.

Sudbury Chapter's 2000/2001 Board of Directors

Position	Contact	
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