Executive Finance

Professional Development | Strategic Consulting | Thought Leadership

At Executive Finance Partners we are innovative authors, speakers, public accountants, executives, and corporate directors working across diverse industries. We also happen to both possess a passionate interest and extensive background in professional and executive education.

Our **passion** and our **mission** is *to develop and deliver professional development that engages and educates financial professionals and executives to meaningfully improve workplace performance*.

Our diverse offerings deliver on this mission by:

- **Surveying** the latest thought leadership supplemented with our own thinking and experiences on topics of interest and importance to financial professionals.
- **Engaging** our audience to actively participate in their own learning and development using interactive cases and peer discussions.
- **Providing tools and methodology** that participants take away from their sessions and apply in their everyday workplaces.

We offer our content through multiple platforms. Whether its professional development seminars or conference sessions we accommodate all channels of delivery: in person, virtual classrooms, or e-learning. We are thought leaders in elevating the stature of the finance organization and the people within it in any type and size of organization.

We look forward to working with you,

Blair and Jen

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Professional Bios

Blair Cook CPA MBA

Blair is a seven-time CFO, a director, and an educator at Executive Finance Partners - a professional development and executive coaching firm for financial professionals and executives. He's Senior Director at Diamond Willow Financing Advisory. He also serves as a corporate director and audit committee chair of publicly listed companies: Terravest Industries and Clarke Inc. He is also the Chairman of the Devour Food & Film Festival and serves on various committees of CPA Nova Scotia. He's the host of the MBA Move Beyond Accounting Podcast. Blair is the author of *The Illiterate Executive: An Executive's Handbook for Mastering Financial Acumen*.

Jennifer Nicholson, CPA, CA,

Jennifer is a Commissioner at the Nova Scotia Utility and Review Board. She is a dynamic financial professional with over 30 years of experience in public practice, academia, government, and industry. Jen a strong community advocate and serves as the Past Chair of the board of the Canadian Energy Regulator (CAMPUT). Jen's career epitomizes the diverse experiences and roles that CPAs play across all types of organizations– from financial to operational leadership.

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Our Library of Live, Virtual, and E-learning Courses

By far, our most effective sessions happen we engage with participants in group sessions. We deliver proprietary in-person professional development across the country. Abstracts for each session are provided in the pages that follow for you to copy/paste into your PD calendars.

In-person professional development*	Duration	Presenters
New 2026: Financing Strategies for Financial Executives	½ day Seminar	Blair
New 2026 : Advanced Financial Intelligence for Financial Professionals	½ day Seminar	Blair
New 2026: Addressing the Rise of Shareholder Activism in Canada	½ day Seminar	Blair
New 2026: Deepening the Strategic Mindset for the Financial Executive	½ day Seminar	Blair
New 2026: Building Executive Presence for the Finance Professional	½ day Seminar	Blair
Women in Finance: How to Navigate a Path to Leadership and Succeed	½ day Seminar	Jennifer
Governance Excellence: Elevating Board Collaboration	½ day Seminar	Blair
Mastering Ethical Intelligence	½ day Seminar	Blair
The Principles of Ethical Leadership	½ day Seminar	Blair
Financial Modelling Using Excel	½ day Seminar	Blair
TGIF: Transform, Grow, Innovate in Finance	½ day Seminar	Blair
Elevating the Value of Variance Analysis	½ day Seminar	Blair

*Any of these topics can be truncated to fit conference or PD calendars, however, they cannot be stretched longer.

Conferences and webinars

Each year, we present thought leadership on wide ranging topics of relevance to financial professionals working in industry and public practice. If you are looking for a speaker for your event, give us a call. Conference Sessions: are listed at the back of this PD calendar. Review the long list of topics we've previously presented.

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Our **e-learning PD courses** have been developed to both Canadian CPD and NASBA standards for US CPE.

Course title	CPD	Direct URL link
New 2026: Addressing the Rise of Shareholder Activism	**3**	https://executivefinance.teachable.com/l/pdp/shareholder-activism
New 2025: Deepening the Strategic Mindset	**3**	https://executivefinance.teachable.com/l/pdp/strategic-mindset
NEW 2026 Advanced Financial Intelligence for the Financial Professional	5	https://executivefinance.teachable.com/p/advanced-financial-intelligence-for-the-financial-professional/
Elevating the Value of Variance Analysis	4	https://executivefinance.teachable.com/p/varianceanalysis
Mastering Your Ethical Intelligence (2025 version)	4	https://executivefinance.teachable.com/p/ethical-intelligence-2025
Addressing the Roadblocks of Change	1	https://executivefinance.teachable.com/p/roadblocks-of-change
Financial Intelligence for Entrepreneurs, Executives & Directors	4	https://executivefinance.teachable.com/p/financial-intelligence
The Principles of Ethical Leadership	4	https://executivefinance.teachable.com/p/ethical-leadership
6ExY: Mastering the Six Traits of Executive You	5	https://executivefinance.teachable.com/p/six-traits-of-executive-you
TGIF: Transform Grow Innovate in Finance	4	https://executivefinance.teachable.com/p/tgif
New Business Best Practices After Living Through a Global Pandemic	1	https://executivefinance.teachable.com/p/business-after-covid
Financial Modeling Using Excel	1.5	https://executivefinance.teachable.com/p/envision-the-future-financial-modeling-using-excel
Fraud in the Workplace	1	https://executivefinance.teachable.com/p/fraud-in-the-workplace
Governance Excellence: Elevating the Value of Board Collaboration	1.5	https://executivefinance.teachable.com/l/pdp/governance-excellence
Presentation Skills for Finance Professionals and Executives that Make an Impact	1.5	https://executivefinance.teachable.com/p/presentation-skills
Your First 100 Days as CFO	1.5	https://executivefinance.teachable.com/p/100-days
Capital Budgeting: Analysis that Improves Long-term ROI	1	https://executivefinance.teachable.com/p/capital-budgeting
Master Capital Allocation	1.5	https://executivefinance.teachable.com/p/master-capital-allocation
Best Practices for a Quicker Financial Close	1	https://executivefinance.teachable.com/p/fast-close

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New 2026: Addressing the Rise of Shareholder Activism	**3**	https://executivefinance.teachable.com/l/pdp/shareholder-activism
New 2025: Deepening the Strategic Mindset	**3**	https://executivefinance.teachable.com/l/pdp/strategic-mindset
NEW 2026 Advanced Financial Intelligence for the Financial Professional	5	https://executivefinance.teachable.com/p/advanced-financial-intelligence-for-the-financial-professional/
Thinking and Acting Strategically as CFO	1	https://executivefinance.teachable.com/p/corporate-strategy
Financial Analysis: Reading Financial Statements like a Pro	1.5	https://executivefinance.teachable.com/p/financial-analysis
ERP - What Every CFO Should Know About Implementing a New ERP	1	https://executivefinance.teachable.com/p/erp
Change Management: Being A Catalyst CFO	1.5	https://executivefinance.teachable.com/p/managing-change
Financing Strategy: Tips for Sourcing Capital	1.5	https://executivefinance.teachable.com/p/financing-strategy
The Credible CFO: Driving Growth & Delivering Predictability	1	https://executivefinance.teachable.com/p/credible-cfo
Ethical & Audit Considerations of Cryptocurrency	1.5	https://executivefinance.teachable.com/p/ethical-audit-considerations-of-cryptocurrency
Learn Accounting in 1 Hour	1	https://executivefinance.teachable.com/p/learn-accounting-in-1-hour
Corporate Finance Principles	1.5	https://executivefinance.teachable.com/p/corporate-finance
Risk Management	0.5	https://executivefinance.teachable.com/p/risk-management
Financial Statement Auditing	4	https://executivefinance.teachable.com/p/auditing-financing-statements

**Executive Finance Partners Inc. is not a registered distributor of CPE with NASBA. However, our content has been designed, tested and distributed in the US market to US CPA's through strategic partnerships is the US. Contact us for more information on how to acquire CPE credits through one of our partners.*

Our courses can viewed online at: https://executivefinance.teachable.com/

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New 2026! Financing Strategies for Financial Executives

Course Abstract

One of the highest value contributions of any senior financial professional is to lead the development and execution of a viable financing strategy. The world of financing is dynamic, complex, and active. In course, you will learn to how to successfully navigate capital markets and identify the right financing instruments to meet your organizations needs.

Once the appropriate sources of financing are identified, you will learn how to guide a financing process and negotiate terms from interested capital providers. The course also addresses best practices for managing covenant compliance and reporting and what to do when the terms of the agreement cannot be met. From strategic planning to execution, this course will guide the financial leader every step of the way.

Course Objectives:

- Identify and match the appropriate sources of capital to meet the organizational need.
- Negotiate the terms in a letter of interest
- Comply with the financial and reporting requirements of the credit facility and how to approach situations of non-compliance
- Determine the amount of financing requirement and prepare a dynamic financing model

Target Audience

The course is well suited for existing and aspiring finance executives. Those tasked with finding capital to support their organization strategic plans will also benefit from enrolling in this course.

Course Agenda

1. Strategic foundation of financing
2. Complete universe of debt and equity financing instruments
3. Planning and executing a capital raise process
4. Distressed financing and restructuring situations
5. Capital structure optimization
6. Financing financial analysis

Executive Finance

Professional Development | Strategic Consulting | Thought Leadership

NEW 2026! Deepening the Strategic Mindset for the Financial Executive

Course Abstract:

Deepening the Strategic Mindset for the Financial Executive is a rigorous, practitioner-led course built around three enduring principles: that great strategy emerges from insight, choice, and disciplined execution — not from templates and goal lists. Drawing on the most respected frameworks in modern strategy, the course equips financial leaders with both the conceptual vocabulary and the practical analytical tools to make a meaningful and differentiated contribution to their organization's strategic management process.

The course is organized around four pillars of modern strategy. The first pillar establishes the intellectual foundation describing the nature and need for strategy. The second pillar develops the strategic mindset and paths to attaining strategic insight. The third pillar focuses on crafting robust strategic alternatives and evaluating the difficult trade-offs that define a genuine strategy. The fourth pillar addresses implementation, execution, and the monitoring systems that allow leaders evaluate and react to strategy as it evolves.

Course Objectives:

1. Facilitate a rigorous strategic conversation using an integrated strategic management framework.
2. Distinguish good strategy from bad strategy by identifying common failing strategic frames.
3. Evaluate an organization's integrated set of strategic choices to ensure internal coherency and financial viability.
4. Conduct a strategic situational analysis using a variety of strategic analysis frameworks to synthesize a clear strategic Diagnosis.
5. Cultivate strategic insight using different analytical and critical thinking pathways.

Target Audience:

Senior financial professionals that want to deepen their strategic mindset to develop stronger, more resilient business models.

Course Agenda:

1. What is Strategy – Foundations and Frameworks
2. Competitive Advantage and the Seven Powers
3. The Strategic Role of the Financial Executive
4. Situational Analysis and Strategic Insight
5. Creating and Evaluating Strategic Alternatives
6. Strategy Execution, Alignment and Monitoring

Executive Finance

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NEW 2026! Addressing The Rise of Shareholder Activism in Canada

Course Abstract:

In today's session, you will experience the pressures of a Board of Directors under attack from activist shareholders. Board's decisions are critically scrutinized more so than ever before giving right to activism and engagement challenges with the shareholder base. In this course, you will learn about the state of shareholder engagement issues and trends in corporate Canada and explore strategies and tactics to improve alignment across the governance system. The principles of this course transcend corporate Canada and can be applied in any governance context.

Course Objectives:

6. To identify recent trends and common issues giving rise to shareholder activism.
7. To discuss and propose courses of action to defend against shareholder challenges.
8. To improve shareholder relationships and strengthen alignment between shareholders, the board, and management.

Target Audience:

Senior financial professional that serve on the Board of Directors or Senior Management in public companies or companies with diverse shareholder groups.

Course Agenda:

7. Rise of Shareholder Activism
8. The Mindset of Activists
9. Activist Attack Methods
10. Structural Legal Defenses
11. Engaging with Activism
12. Board Hygiene

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TGIF: Transform Grow Innovate in Finance

Abstract:

This is a workshop in finance transformation. In the world today, business models continue to change and the need for insight and information to make informed decisions never higher. In this workshop, we will explore how we adapt and thrive in this new world. Transformation begins with understanding our own strengths and weaknesses as well as the required role of the finance function inside any organization. From there, you will explore and develop your own transformation plans to address people, process and system issues. By the end of the workshop, you will have a personal and functional strategic plan as a takeaway and immediately start implementing.

Who Should Attend:

Any finance professional or executive looking to make a greater contribution to the organization they serve and in need of a plan for transforming the

Presenter:

Blair is a seasoned CFO working across diverse industries and businesses. He is a thought leader specializing the matters of interest and importance to the Office of the CFO. He has extensive experience with start ups, turnarounds, and accelerated growth situations.

Topics Outline:

- Defining the competencies of financial professionals and financial executives
- Evaluating the maturity level of your finance organization
- Developing a situational assessment of strengths, weaknesses, opportunities and threats
- Managing your people better
- Developing strong teams
- Tackling business process improvement
- Tightening up your close process
- Evaluating your systems and looking at upgrade/replacement decisions
- Designing scorecards and executive dashboards
- Developing a strategic plan for transformation
- Using change management principles to make it happen

I can't say enough positive things about that course! Most courses have a few lessons I grab on to before it gets mundane, but Blair's knowledge was so interesting and I related to almost everything he spoke of. I learned so much and I was inspired again like I haven't been in a little while! It built my confidence up and reiterated the importance of our roles. I am officially rejuvenated and refocused with lots more tools!!! Thank you, thank you, thank you for making this happen, I think that yesterday was really important…Thank you!!!!!!!!! I love being a part of Finance!!!

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Governance Excellence: Elevating the Effectiveness of Board Collaboration

Abstract:

Learn to work the boardroom to the advantage of any organization. Governance excellence is premised on four cooperative board leadership rolls between management and the board of directors. When these four leadership roles are present, the organization's board has the opportunity to become a strategic asset and another point of competitive advantage.

The course explore how management can effectively leverage the expertise and experience of the board's directors and for directors how make a valuable contribution to the organization you've chosen to serve. The leadership roles will be demonstrated through three common areas ripe for improved contributions including managing the people aspect of the board/management relationship, the board's role in risk management and the board's role in supporting strategic management.

Who Should Attend:

The target audience for this course includes: senior financial professionals, directors, and executives who serve on or for a Boards of Directors.

Presenter:

Blair is a many-time Corporate Director serving on the boards of a number of Canadian public companies and non-profit organizations. He has also fulfilled the CFO role in public and private companies with governing Boards of Directors.

Topics Outline:

- Constitution of the Board and the roles of directors and management
- The 4 board leadership roles of Governance Advantage
    - The RECRUITER: Getting the right people involved
    - The CONDUCTOR: Discussing what matters
    - The INFORMER: Communicating what matters
    - The FACILITATOR: Deciding on what matters
- The Board's role in strategic and risk management, leadership development, succession planning and capital allocation.

This was a very informative course, detailing the activities of the board, and how the interaction of the directors occurs, both with and without management. - Keith Johnson (Director SOX Compliance at Waterjet Holdings)

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Mastering Your Ethical Intelligence (2025 Version)

Abstract:

In the past decade, the world has changed. The moral fabric of society has rapidly swung from cancel culture to a general degradation of social civility. These shift in values and behaviors surrounds us in everyday events. Navigating safe passage through daily personal and professional life relies heavily on your ethical judgement. In an age of social media and a discerning general public, everyone now has a say in judging your actions, behaviors, and decisions. In this course, we are going to tackle the challenge of elevating our ethical intelligence. Ethical intelligence is a principled approach to living our personal and professional lives to ensure we minimize personal risk and positively interact with the world around us. In this updated version of the course, you will see how small indiscretions get magnified and can derail otherwise good people with no il intentions and jeopardize their careers and personal lives.

Who Should Attend: ***This session will qualify for the ethical CPD requirements.***

All financial professionals can benefit from a higher level of ethical intelligence.

Presenter:

Blair is a many time executives and corporate director who has researched and interviewed experts in the field of ethics. As specialists in turnaround situations, he has both observed and experienced the role ethics plays in the decay and subsequent resurrection of under-performing organizations.

Topics Outline:

- Describe the state of ethics in the world today
- Compare perspectives on the origin of our ethics and how ethical decisions are made
- Analyze everyday living using the five principles of ethical intelligence
- Identify common scenarios that give rise to ethical decay and elevate the risk of doing something inappropriate
- Explore the impact of organizational culture on ethics
- Design organizational culture to cultivate stronger ethics in employees

The Executive Finance duo, Jen and Blair, recently presented to our finance team on Executive Presence. We learned and we laughed. We are very much looking forward to planning our next in-house session. – Elizabeth McEwen, CFO of CFFI Ventures

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The Principles of Ethical Leadership

Abstract:

The most pressing need in the world today is ethical leadership. Ethical leadership at all levels. Everyone of us is a leader at some level. Some of us lead teams. Some of us lead organizations. Some of our positions directly impact the world at large. This course explores leadership in those very contexts. It's a personal choice on how you choose to lead. Enlightened leaders recognize the broader implications their actions have on others and leverage principles to achieve greatness. Destructive leaders take short cuts. They may achieve success for a period of time, but almost always it catches up with them and diminishes what they might have otherwise achieved using a more ethical approach to leadership. In this course, you will learn 20 principles of ethical leadership that will serve you for the rest of your career and the rest of your life. It's an insightful and interesting perspective on the state of the world and provides you with a framework to not only survive, but also thrive in the modern era.

Who Should Attend: ***This session will qualify for the ethical CPD requirements.***

All of us can become better leaders when we learn these principles, whether you lead yourself or find yourself leading a team or an organization.

Presenter:

Blair is a many time executives and corporate director who has researched and interviewed experts in the field of ethics. As specialists in turnaround situations, he has both observed and experienced the role ethics plays in the decay and subsequent resurrection of under-performing organizations.

Topics Outline:

- Learn how to motivate and mobilize your people
- Learn how to avoid scandal and reputational damage
- Learn how to standout in the world and build a legacy
- Learn how to leverage ethical philosophy to create another point of competitive advantage

This course was amazing (I am not using this lightly as you mentioned some do in the course). I really appreciate the work put into developing the content and feel that it is beneficial to everyone. I have always prized my ethical thinking and found that there were times (while listening to the presentation) where I had to re-evaluate some of the things that I have done with my teams in the past. I plan to change a few of my behaviors based on the information that you folks have provided in this course.

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Updated 2006: Building Executive Presence for the Financial Professional

Abstract:

The difference between a strong financial professional and a strong financial executive often comes down to executive presence. Executive presence is an essential suite of soft skills that makes you promotable or gets you an executive appointment. Executive presence are traits that make you an influential advisor and leader at the top and across the organization.

In this session, you will learn how to develop these traits to enhance their own executive presence. You will walk through the five traits of executive presence. You will raise your own level of self-awareness and develop strategies and tactics to immediately help you and your ideas get noticed.

Who Should Attend:

Career-minded financial professionals working in senior roles or looking to grow into senior management positions.

Presenter:

Blair is a many time executive and corporate director. He professionally coaches and mentors finance professionals and executives to position individuals and the finance function as de facto advisors with other executives, the CEO, and the board of directors.

Topics Outline:

- Identify the attributes that build and erode Executive Presence
- Improve your communication skills
- Build your confidence and overcome your own imposter syndrome
- Build your own personal brand
- Raise awareness of your own social and emotional intelligence
- Build stronger teams and deeper relationships
- Improve your personal resilience and get your voice heard

I really enjoyed yesterday, especially the executive presence section and would definitely be interested in a follow up session. It really had me thinking about my future and helped clarify my goals now that I am finished the CPA program. – participant from CFFI Ventures

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Women in Finance: How to Navigate a Path to Leadership and Succeed

Abstract:

Women face unique challenges as they grow in their careers and progress through the corporate ranks to leadership positions. From managing office politics to managing the family calendar, women see the world from a different perspective. As much as the corporate world has changed over the years, there is much still to be done.

In this seminar you will learn about leadership principles and tactics that grow your executive presence. You will learn how to leverage your strengths to lead people and bring strategic perspective that is all to often been missed in the past.

Who Should Attend:

Fierce women seeking to strengthen their leadership skills in all areas of their lives and improve their career opportunities.

Presenter:

Jennifer is a Commissioner at the Nova Scotia Utility and Review Board. She is a dynamic financial professional with over 30 years of experience in public practice, academia, government, and industry. Jen a strong community advocate and serves as the Past-Chair of the board of the Canadian Energy Regulator (CAMPUT). Jen's career epitomizes the diverse experiences and roles that CPAs play across all types of organizations– from financial to operational leadership.

Topics Outline:

- Enhance your level of personal confidence;
- Advocate for yourself and your team;
- Brand yourself as an executive leader;
- Challenge the barriers that confront women in the workplace;
- Deal with gender-based conflict;
- Leverage your emotional intelligence to bring greater empathy to your leadership style;
- Coach other women to succeed in the workplace.

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Financial Modelling with Excel

Abstract:

Learn how to use Excel to build a financial model of your business. These skills are transferable whether you are asked to prepare a financial projection, a cash, capital, or operating budget, or a business model of your organization to support a strategic plan. This hands-on workshop will walk you through some best practices and theoretical considerations when using Excel to prepare financial analysis to support management decision making.

Who Should Attend:

Financial professionals, financial analysts, controllers, finance advisors. This is a hands on session and participants should bring their laptops.

Presenter:

Blair is a bit of finance junkie and has fulfilled the role of financial analysts for several large public and private companies during his career. In this workshop, he will show you a few tips and traps when it comes to preparing a financial model in Excel.

Topic Outline:

- Preparation of capital budgeting using Excel
- Discussion of decision analysis using Excel (monte-carlo analysis and preparing tornado charts)
- Preparation of financing analysis (lease versus buy, future cash flow)
- Preparation of a complete financial projection using Excel
- Tips and traps for building Excel integrity into your financial model

"Fascinating topic. Very well presented in understandable terms. Thanks!" – webinar participant
"I am a finance professional who has worked in this field for many years and I think Blair is one of the best presenters I have ever had the pleasure to listen to - great job." – webinar participant
I have listened to may instructors in my CPA CPE quest, this go round. There were several very good courses and presentations available, but Mr. Cook is the most captivating liveliest and most knowledgeable in the of all I have heard - Dennis R. Callahan (CFO, Financial Reporting, Budgets, Inter.. at CFO Services | Fractional CFO, Financial)

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NEW for 2026! Advanced Financial Intelligence for the Financial Professional

Abstract:

Calculating and analysing numbers is one thing that most financial professionals do with ease. But where many struggle with is converting the intimate knowledge of the financials into a strategic insight or advice for leadership and boards. Whether its to raise capital, negotiate M&A transactions, or make investment decisions – financial intelligence is the higher order application of the numbers to create and preserve value. Financial intelligence gives you swagger.

This course is uniquely designed to show you how seasoned financial executives act and sound like financial experts. It shares with you the common rules of thumb that you can use in discussions to describe performance, negotiate a transaction, or evaluate opportunities.

Who Should Attend:

For those wanting and willing to make a greater impact in their organization using financial intelligence.

Presenter:

Blair is a financial executive, executive coach, and corporate director. He lives his working life in the boardroom and can help you swim with the sharks!

Topic Outline:

- Identify credibility and quality issues of financial information
- Assess financial performance of business and ask incisive questions
- Evaluate financial strength and identify relevant sources of capital
- Slice and dice the various components of the business
- Review investment analysis and avoid making value destructive decisions

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Elevating the Value of Variance Analysis

Abstract:

One of the most common criticisms of non-finance managers, executives, and directors is that they have difficulty understanding financial performance from the analysis provided. Often variance analysis is overwhelming, confusing, lacking in precision, begging more questions than it answers with superficial explanations. In this course, you will take a deep dive into how you can do variance analysis better. In the process, you will add significant value to management decision making.

Using an audience centric view, you will learn best practices using examples and case studies to improve traditional variance analysis using numbers and descriptive explanations. You will also learn to make variance analysis through charts, graphs and images. Finally, you will explore different structures that help facilitate a conversation about organizational performance.

Who should attend:

This is an impactful course whether you are preparing the analysis, reviewing it as a leader, or presenting it to your audience. Honing this skill elevates executive presence and the level of influence and persuasiveness of any financial professional.

Presenter:

Blair works with many finance leaders across diverse industries and has recognized that this topic is a common area of challenge for most finance and accounting organizations.

Topic Outline:

- Adopt an audience-centric mindset when preparing and presenting variance analysis
- Apply best practices to variance analysis to elevate clarity and concision
- Incorporate a visual sense to variances using charts, graphs, and images
- Structure the analysis to facilitate a conversation about the actions management should take to address variances

Feedback from participants!

"Well thought out and practical - both the concepts and the examples!"

"Great Course! I have printed some of the materials and keep nearby as a reference."

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Conference Sessions:

Both Blair and Jen are asked to speak regularly on various thought leadership topics of relevance to financial professional in industry and public practice. Current presentations have included:

Ethical and Audit Considerations of Cryptocurrency (featuring the case The Quadriga Quandary)

Target audience: Auditors and technology enthusiasts

Abstract: Cryptocurrency continue to grow in value and in numbers despite their checkered past in the media. 2019 has been marked by the epic failure of QuadrigaCX, Canada's largest crypto-exchange. In this session, we explore cryptocurrency to build a higher level of understanding of what it is, how it works, and for auditors – what to watch for if one of your clients happens to now transact and hold cryptocurrency on their financials.

TGIF: Transform Grow Innovate in Finance

Target audience: Financial leaders seeking to do more with their finance function

Abstract: The finance function of every organization has become strategic neurocenter of many organizations. Sadly, that bold statement is only true in less than 10% of the finance organizations today. The reality is that the majority of finance organization struggle to keep up with transaction processing and financial reporting and as a result, living in this sort of context finance feels like the mislabeled "back office" that many associate with the finance and accounting function. In this session, we look at proven ways that finance leaders can elevate the finance function to deliver value, foster insight, and facilitate strategy execution and development.

6ExY: Six Traits of Executive You

Target Audience: Financial professionals aspiring to embody the characteristics of great financial executives

Abstract: Many financial professionals aspire to become financial leaders in their organization. There is a true distinction between a strong financial professional and a strong financial executive that has grown in importance, yet few recognize there is a difference. A financial professional is one who derives value from technical expertise. A finance executive has technical expertise as a foundation and then adds a spark to it to make them more influential, more strategic, and more persuasive inside and outside of their organization. In this session, we will explore the six most important traits of executive presence in a way that will change how most CPAs perceive their value add to employers and clients.

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The Role of Finance in the Boardroom

Target Audience: Any financial professional that either sits on a board of directors or serves a board of directors as management

Abstract: Many organizations are governed by a board of directors. The majority of boards fail to govern effectively or efficiently. Fact. In this session, we will explore the four board leadership roles that distinguish great boards from mediocre boards. In particular, we will focus on the role of the financial executive as their role is critically important to facilitating and streamlining how effectively a board functions. Boards that embody the four traits provide the organization with another point of competitive advantage and attendees will walk away from today's session with hard questions to reflect upon for the boards upon which they are involved.

Talking Strategy with Your Clients

Target audience: Financial professionals looking to improve their ability to think and act strategically

Abstract: Strategic thinking is a skill most financial professionals get few opportunities to practice, yet most want and expect a seat at the strategy table. In today's session, we will discuss ways to think about strategic management inside your organization. Some organizations have a formal strategic plan, others seeming nothing at all; however, by virtue that your organization remains in business today, suggests your organization has a strategy. But is that strategy the most effective strategy? Is that strategy being executed to its full potential? These are important questions that those of us working in finance are well positioned to not only facilitate, but lead. Let's discuss how you can do this.

Ethical Intelligence

Target audience: Everyone

Abstract: Ethical intelligence is arguably the most valuable skill a CPA can develop during one's professional career. Few of us realize just how prevalent ethical issues are in our daily lives and the long-term repercussions everyday decisions can have on our professional careers. That is, until it's too late. In this fun and interactive session, we are going to turn on and stimulate your inner moral compass. Profoundness of this session does not come from a technical, philosophical perspectives, but instead raises awareness of how each of us is highly susceptible, even subconsciously, to ethical decay. You will walk away from this session with a new level of conscious awareness of the environment factors that undermine your moral decision making and in doing so, elevate your level of ethical intelligence.

Executive Finance

Professional Development | Strategic Consulting | Thought Leadership

10 Skills that Differentiate Financial Executives

Target audience: Those seeking to be considered for senior finance management position

Abstract: In this session we explore what CEOs and Boards of Directors are looking for in the skillset of the financial leaders they are hiring today. Perhaps surprising to most is that your technical skills don't distinguish you from your peers. In this session, we will review the top 10 non-technical skills that tomorrow's financial leaders must develop and demonstrate today to get considered for these positions. Not only will we identify the top 10 skills, we discuss how these skills can be developed to position you for those opportunities to become a catalyst strategic leader in any organization.

In addition, we have delivered webinars and conference sessions in the past on these subjects as well:

- Cubicle to the Corner Office – the Career Journey of Professional to Executive (CPA One, Bank Islam)
- Shareholder Activism: Issues and Trends (ICD)
- Hiring and Coaching Financial Professionals for ROI (Venor)
- Professional Skepticism – A Questioning Mind (Collins Barrow, Sobeys, CPA Manitoba, CPA Newfoundland)
- 6ExY: Six Traits of Executive You (CPA Newfoundland, AC Group)
- The CFO's Guide to Successfully Scaling a Growth Company (Proformative, Illumeo)
- Best Practices for a Quicker Financial Close (Proformative, Illumeo)
- Driving Growth and Delivering Earnings Predictability as the CFO (Proformative, Illumeo)
- On Becoming CFO: It's About the People (Keynote for: FEI, Atlantic Risk Managers, various CPA institutes)
- Modern Competency Assessment in the Office of the CFO (Proformative)
- Becoming the Credible CFO (Proformative, CPA Manitoba)
- Advanced Capital Budgeting: Analysis that Improves Long-term ROI (Proformative, Progressive Conferences, Illumeo, Lorman)
- The Role of Finance in the Boardroom (Proformative)
- CFO to Chief Trusted Advisor: Earning that Role with Your CEO (Proformative)
- Talking Strategy with Your Clients (Proformative, AC Group, CPA Manitoba, Starting Point Conference SMU)
- Your First 100 Days as CFO (Proformative, CMA Nova Scotia)
- Financing Strategies for Your Clients (Proformative, AC Group)
- Fraud Awareness and Prevention (Proformative, AC Group, CPA Manitoba)
- Financing Strategies in Difficult Situations (CPA Manitoba)
- 10 Skills that Differentiate Financial Executives (Proformative Conference New York)

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- Reducing the Time to Revenue: How Finance Can Lead the Way (Proformative)
- Powerful PowerPoint Presentations (Illumeo, Compliance IQ)
- Developing Highly Engaging E-learning Training for Financial Professionals (Proformative)
- Building a Financial Model of Your Business (Starting Point Conference SMU)
- Ethical Intelligence (AC Group)
- Getting on Boards (AC Group)
- Planning and Implementing Your Next Cloud Based ERP (Illumeo, Proformative)

Many of these sessions have been developed in conjunction with our clients who have ideas about topics they would like included in their calendars or conferences. From there, we will research the topics and develop presentations to meet those learning objectives. So, if you've got a training need, we are happy to roll up our sleeves and do the research to aggregate the latest and greatest thinking on any topic you have in mind.

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