

2026 CPA PEP Candidate E-Book



CPA

CHARTERED
PROFESSIONAL
ACCOUNTANTS
WESTERN
SCHOOL
OF BUSINESS

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PUBLISHER'S NOTE

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PUBLISHER'S NOTE

Portions of this e-book are adapted from earlier blog posts that informed its development. All incorporated content has been thoroughly reviewed, updated, and confirmed by CPAWSB to represent the most accurate and current information available as of 2026.



FOREWORD

Welcome to the Chartered Professional Accountants Professional Education Program (CPA PEP)

Congratulations on taking the first step towards earning those three powerful letters—C...P...A! While CPA formally stands for Chartered Professional Accountant, its meaning goes beyond an acronym.

For some, the CPA designation represents ambition and opens doors to career advancement and leadership goals, perhaps becoming a partner at a public accounting firm or serving in a senior leadership capacity in business.

For others, the CPA represents achieving financial security and being able to support their families and build a life of stability. Some may view the CPA designation as an opportunity to give back by providing their trusted financial expertise to strengthen their local communities.

Whatever your reason, entering in the CPA program will provide you with a pathway to growth, resilience and transformation. You will go through a journey filled with challenges, discoveries, and moments of personal and career growth. The CPA program will ultimately prepare you for success in ways you never imagined.

This resource was created with you in mind: to support your success in the CPA program, build your confidence, and help you navigate the road ahead in your professional career.

Remember, asking for help is a sign of strength, and using

resources like this one is a step toward achieving your goals.

Our goal at the CPA Western School of Business is to ensure that every learner feels equipped and empowered. We understand that each learner brings unique strengths and experiences, and this guide is designed to meet you where you are.

Regardless of your personal background, work experiences, or prior education, we hope that you will be able to apply the strategies, helpful tips and tools to make your CPA journey more manageable and meaningful.

Within this guide, you will find:

- What to expect as a new CPA learner. Starting a new program can be exciting and nerve-racking, and this guide helps answer common questions you may have upon embarking on the CPA program.
- Academic integrity and standards. As a CPA, you are expected to exhibit integrity, professionalism, and excellence. It is important for you to exhibit these same characteristics while you are a learner within this program.

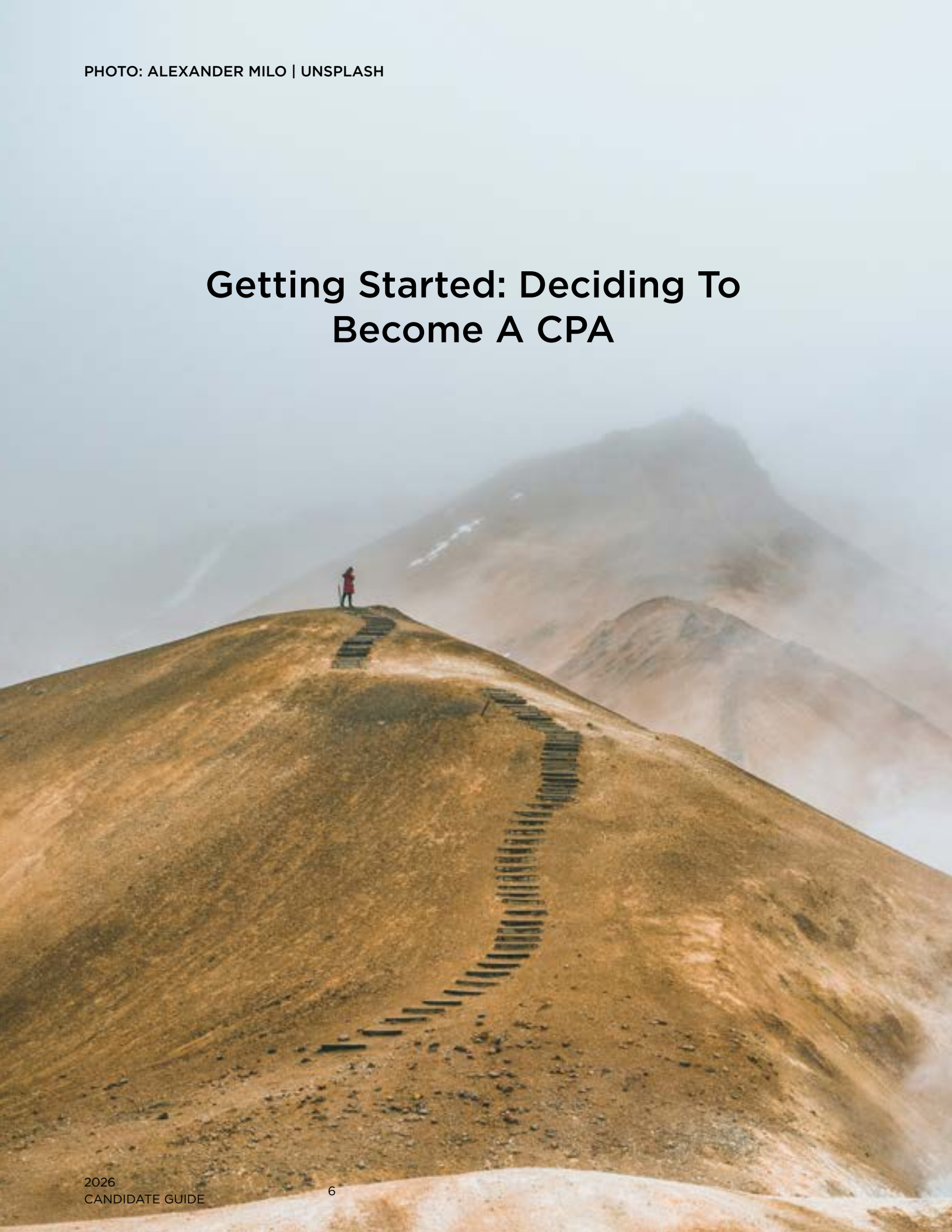
- Support resources available for you to access. Utilizing third-party support, such as course facilitators, external tutors, coaches, academic advisors, and peers, can help you stay on track. Building your own CPA community can lead to personal success in the program.
- Important decisions to make in the program. Elective choices, course planning and scheduling, preparing for the Common Final Examination (CFE) are common questions you may be asking yourself. While these decisions do not have to be made today, it's helpful to keep them in mind.

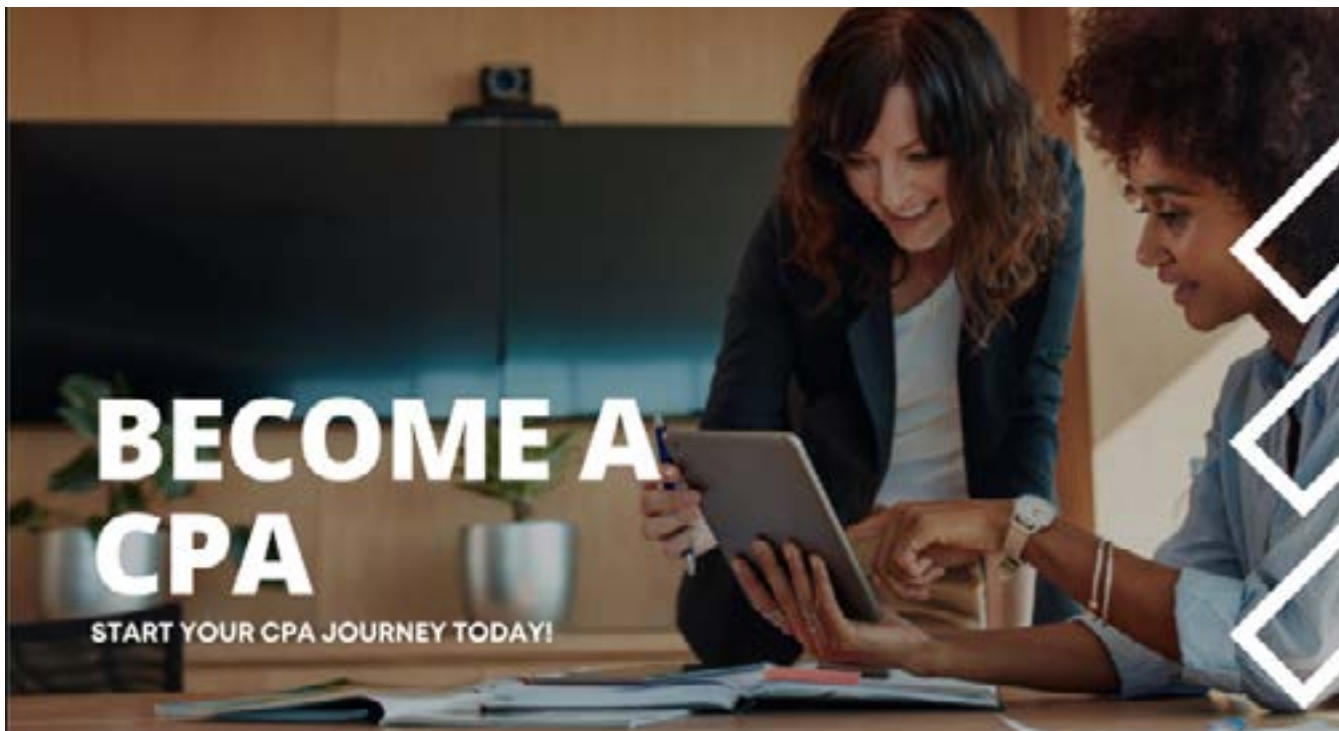
We encourage you to explore, apply what you learn, and reach out whenever you need support. You are not alone on this journey; we're here to walk alongside you every step of the way.

Your success matters, and this resource is one more way we're committed to helping you thrive. And don't forget to visit the CPA Western School of Business Learner Support website for even more tools and resources to support your journey.

Best of luck!

Getting Started: Deciding To Become A CPA





I WANT TO BECOME A CPA. HOW DO I GET STARTED?

It can be overwhelming for some to apply to become a CPA and not know where to begin or who to contact. The CPA Western School of Business (CPAWSB) has a wide range of resources to help applicants and learners along their journey.

The information and listings below are intended to help you get started and inform you about who to contact for assistance when you need it.

Still Deciding if CPA is Right for You?

Support from Your Provincial CPA Body

The CPA provincial bodies regulate CPAs in their provinces. They will likely be your first point of contact before enrolling with CPAWSB.

If you're looking for information about becoming a CPA, [visit the CPA provincial websites](#) and contact your provincial CPA organization to speak with a business development or student recruitment officer.

CPA provincial bodies can also give you information about:

- practical experience
- mentorship
- career services
- volunteer opportunities
- upcoming provincial CPA information sessions and events

Ready to enroll with CPAWSB?

Once you have all the information from your provincial CPA body, you can apply to the CPAWSB. Before starting the admission process, it is important to know your applicant type to determine the specific admission steps you need to follow; the documents you need to

submit for initial assessment; and the resources and information that will apply to you.

Determine your [applicant type](#), and bookmark the page for future reference. Refer to it as needed, as it contains all of the information you will need during your enrollment process, including:

- the admission steps in detail (click on each numbered step for detailed instructions)
- the documents you need to submit and how and where to submit them
- important information and links to resources that apply specifically to you

Admission Advising for CPA Prospects

At any point, after reviewing your applicant page, if you are still unsure about the CPAWSB enrollment process or need help with:

- determining your applicant type.
- creating your My CPA profile or accessing and navigating your My CPA portal.
- requesting a transcript assessment or credential review.
- determining which documents we will require for your assessment or credential review.

- general questions about
 - » [CPA Designation](#)
 - » [CPA preparatory courses](#)
 - » [CPA Professional Education Program \(CPA PEP\)](#)
 - » [Program costs and fees](#)
 - » [Practical experience Requirements](#)
 - » [Study/work permits for temporary residents](#)

The [CPAWSB Admission Advising team](#) is available by phone, email, and live chat to support you. You may also [book an online meeting](#) with an admission advisor when available.

Have questions about your transcript assessment?

If your CPAWSB My CPA profile and transcript assessment are in process, find answers on your [applicant page](#) by clicking each admission step for details and links. For assistance with your transcript assessment or results, [contact either the Admission Advisors or the Transcript Assessment team](#).

We can help you with questions you have about the transcript assessment process, the documents you need to submit for the assessment, understanding your transcript assessment results, and explaining your options and next steps once the assessment is completed.

Where to send documents for transcript assessment

All documents related to your transcript assessment should be [submitted electronically or by mail only to our Edmonton office](#).



Assistance and Advising for CPA Preparatory Courses Students

If your transcript assessment shows you need to complete any prerequisite courses, you can take them at a recognized post-secondary institution or at CPAWSB. If you choose CPAWSB, apply for CPA preparatory courses, and once approved, you can register for your course(s). You can find the admission instructions on [your applicant page](#) or the CPA preparatory course Admission Application page. If you have questions, an Admission Advisor can assist you before you apply.

From application through your preparatory courses, the [CPA Preparatory Courses Student Experience Team](#) is here to help. They can assist with your application, course scheduling, work-life balance, exam timing, withdrawals, student dues, and other questions like study permits for temporary residents.

Registering in CPA preparatory course exams: Questions about registering for exams, special consideration, or accommodations can be directed to the CPA preparatory courses Exams Team.

Transitioning to CPA PEP: Once your prerequisites are complete and you are eligible to enroll in CPA PEP, [you can follow the steps on the Transitioning to PEP webpage.](#)

Assistance and Advising for CPA PEP Candidates

Entering CPA PEP directly after your transcript assessment is completed

Once your transcript assessment is complete and shows you're eligible or conditionally eligible for CPA PEP, your next step is to complete a CPA PEP admission application. Once it is approved, register for your first module.

Information about the CPA PEP admission application and instructions for completing the admission application can be found on [your applicant page](#) or directly on the [CPA PEP Admission Application page](#). If you have questions about the CPA PEP admission application, an [Admission Advisor](#) can assist you before you apply.

Contact the CPA PEP Admission Services team for help with your application, temporary or permanent program withdrawals, transferring from another region, and study permits.



Transitioning from CPA preparatory courses to CPA PEP

Once your prerequisites are complete and you are eligible to enroll in CPA PEP, you can follow the steps on the [Transitioning to PEP webpage](#).

Applying to CPA PEP with an Active, Good Standing International Designation

Contact the [CPA PEP Admission Services team](#) for assistance with your application, submitting documents for assessment, temporary or permanent program withdrawals, [transferring from another region](#), and study permits.

Enrolling in CPA PEP modules

Once your CPA PEP admission application is approved, you can register for your first module (or challenge exam) through your My CPA portal. For assistance with enrollment, withdrawals, schedules, key dates, and evaluations, contact our [Module Services team](#).

Learner support

Your journey toward your CPA designation can have ups and downs. [Learner Support](#) is here to assist all CPAWSB learners in developing both technical and enabling competencies. We offer Academic Advising, Coaching, Peer Studying, and Tutoring services. To learn more or request any of these services, visit the Learner Support page on our website. Additional learning resources are also available.

DO YOU EVEN ACCOUNTANT?

The right personality for CPA PEP

A recent email from a learner hit me hard as I can relate to her self-doubt:

I really like your outgoing personality, which makes us feel very close. I am also a people person. However, some of my friends who have known me for a long time or my family think that I may not be suitable for the accounting profession because of my extroverted personality.

They believe that accountants should be serious. Is an extroverted personality an advantage or a disadvantage in the accounting industry? Should I do something to change my character?

Personality fail

My grade school report cards read: Does well on tests, but she talks too much. Creative, but she talks too much. Good energy, but...you get the point.

I'm not sure whether my parents were quoting Andre Gide, author of Autumn Leaves or Kurt Cobain from Nirvana when reinforcing: "It is better to be hated for

what you are than to be loved for what you are not." Truth.

Professional mis-practice

During my annual review at a public accounting firm, a senior manager confirmed my work quality was stellar, and clients enjoyed working with me. However, he shared that my loud personality made it appear at times as though I didn't take the work seriously. The senior manager went on to say I would be a great asset as a firm partner, but I'd never make it there like "this."

He all but said it: Does well but talks too much.

DiSC profile

Before the Core 1 Orientation Workshop, candidates are required to take the DiSC personality profile quiz. Candidates receive a profile showing their varying amounts of Dominance, Influence, Steadiness and Compliance.

PHOTO: FILIP STARÝ | UNSPLASH



Later in the program, during Capstone 1, candidates are placed into groups, with DiSC profiles used as one factor for group allocation. I often hear from candidates who wish to retake their DiSC profiles.

When pressed as to why, many candidates admit they didn't answer truthfully in their first DiSC questionnaire, they wanted to ensure they "fit" into the program.

Candidates were concerned they weren't "accountant enough" for CPA PEP.

After nearly 15 years of working closely with accountants, I will tell you that while many of us possess a shared passion for making things balance, there is also a mix of "types" of accountants. If you want to be a CPA, your personality is "accountant enough" for CPA PEP.

Find your people

Let's be real, some people cannot stand me. Others will [joyfully pose for mirror selfies](#) and [co-write blog posts](#) with

me. My advice: Find your people as this [journey can be difficult](#).

Know your worth

CPAs can be outgoing, have fun AND also take things seriously. It need not be one or the other. Since becoming a designated accountant, I continue to work on my communication – speaking AND listening – skills.

The senior manager was correct: I quit shortly after that meeting and never made it to partner. The world needs all types of people, and together we fulfill the roles that keep the financial world spinning. Some people may decide to proceed down the path to work towards becoming a firm partner. Conversely, there are those of us who choose to fulfill the roles of the people who hire partners to work for them.

PHOTO: DREW BEAMER | UNSPLASH

Planning and Common Misconceptions: CPA PEP Electives



BY: DR. SAMANTHA TAYLOR, CPA, CA

EFFECTIVE ELECTIVE PLANNING:

Part 1

How to plan when it comes to choosing your electives? To address this in detail, we've split this into three parts. In Part 1, we will discuss the registration elements, including the "order of operations" of pre-and-co-requisites for CPA PEP's education program. In [Part 2](#), what things to consider when selecting which electives to register in. Finally, in [Part 3](#), the FAQs specific to elective modules and licensure.

In Core 1, candidates spend much of the Orientation Workshop planning a schedule to complete their CPA Professional Education Program (CPA PEP) studies. During that time, candidates use various resources to help them determine their path from Core 1 to the CFE.

The CPA PEP education path is as follows:



I frequently hear from candidates who are preparing to register in CPA PEP elective modules. I have collected the most frequently asked questions below:

1. Should I fast-track?

If you have already started Core 1, you won't be able to add Core 2. However, after you complete the standard offerings of Core 1 and Core 2, you can choose to fast-track your elective modules.

Not sure what fast-tracking is, or if it's for you? Check out my blog post on [module fast-tracking](#).

2. How many elective modules do I need to take? When can I take them?

You need to pass Core 1 and Core 2 before starting your first elective module and you need to pass at least two electives before starting Capstone 1.

3. When do I register for my elective modules?

If you plan to take modules “back-to-back”, you will need to register for the

next module before finding out if you have passed your current module. If you are unsuccessful in your current module's exam, and that module is a pre-requisite for the next one (for example, Core 2, which you need to pass before starting an elective), you will be withdrawn from that module. CPAWSB (cpamodule@cpawbs.ca) will email you to discuss your registration options.

Consider using [CPAWSB PEP's schedules](#) to plan out your path. This way, you won't accidentally book something that conflicts with a module weekend or examination date. You can make a note of key registration dates.

4. What happens if I fail a core module?

You need to be successful in both core modules before starting the elective modules. If you fail Core 2 and are registered for an elective module, you will be withdrawn from the elective module and contacted by CPAWSB (cpamodule@cpawbs.ca) to discuss your registration options.

5. What happens if I fail an elective module?

You can either retake it or switch to another elective. You can handle your registration matters on your candidate portal or by contacting cpamodule@cpawsb.ca.

6. What happens if I fail an elective three times?

Each module can only be attempted three times. Typically, if you were unsuccessful in any of the education steps of CPA PEP three times, you would be expelled from CPA PEP and need to re-apply. If accepted, you would start at Core 1.

That is not necessarily the case with the electives. If you are unsuccessful in one elective three times, you can register for another elective. You have four elective modules to choose from, so you have some choices until you are unsuccessful in three electives three times each.

If you find yourself struggling with any module multiple times, please consider reaching out to our Learner Support team (learnersupport@cpawsb.ca) to craft a study plan tailored to your needs.



PHOTO: KARAN VERMA | UNSPLASH

The background of the page is a dense, overlapping field of colorful sticky notes in various colors including red, blue, yellow, green, and pink. Some of the notes have handwritten text, such as "Expo 2015!" and "Expo".

BY: DR. SAMANTHA TAYLOR, CPA, CA

EFFECTIVE ELECTIVE PLANNING:

Part 2

In part 2, I will continue by sharing the frequently asked questions from candidates over the years about determining which elective modules they should register in.

1. Which electives should I take?

First, check with your employer

Suppose you are in a CPA Registered Training Office, there may be strict requirements on which elective modules you must take to fit with their accreditation – And this is not just for a public accounting firm. It may be for any industry and government roles as well.

Next, access Getting Started in “Electives Sections”

In your Introduction to CPA PEP module, a course you are automatically granted access to when you are registered in Core 1 and can be found in your D2L “waffle”:



Consider your career ambitions and goals.

There, you can skim through Elective Survival Guides to review the various activities and course content and see which electives fit with your career aspirations. You could also check the CPA Competency Map for content examinable in each elective module.

Remember your Day 2 CFE role

When you write the CFE, you will declare one “Role” for your Day 2 exam. While you can declare a role outside of the elective modules you completed, a strategic choice would be selecting one of your completed elective modules. This will help with your confidence, as you will have already demonstrated elective-level depth in the elective module exam, and confidence is essential when preparing for the three-day CFE.

2. Can I take more than two elective modules?

Yes! You can take two, three, or all four electives – the only “catch” is you need to take them before starting Capstone 1. Once you start Capstone 1, you cannot go “back” during your time in CPA PEP.

This is not typical, though I have seen one candidate who took all four electives a few years ago. Let’s just say his Capstone 1 group was super happy. I bet he felt confident walking into Capstone 2 and the CFE, knowing he passed elective-level depth on all four electives. Outside of his Day 2 role, he only had to demonstrate competency at the CFE at the Core-level.

3. Do I think it is “worth it” to take more than two electives?

Probably not. I subscribe to the “more is not more” model and can find other things you can do to fill your time. But if you feel strongly about taking an extra elective or two, go for it.

BY: DR. SAMANTHA TAYLOR, CPA, CA

EFFECTIVE ELECTIVE PLANNING:

Part 3

In Part 3, I will end the Effective Elective Planning mini-series by discussing FAQs specific to elective modules and licensure.

1. What is “licensure”?

Licensure is a sub-set of the CPA designation, allowing someone to sign off on various assurance and/or taxation engagements.

Candidates can complete their education licensure requirements while completing their CPA PEP studies. To do so, they must pass both the assurance and taxation modules, write their CFE Day 2 in the Assurance role, and achieve depth in Financial Reporting at the CFE. Note, there are also work requirements a candidate must attain. Questions regarding the work experience and education requirements required for licensure must be directed to your provincial CPA body.

2. If I completed CPA PEP without licensure, is it possible to get it after?

Yes! It is possible to become licensed once you become a CPA. This is referred to as “Post-Designation Public Accounting” or PDPA. Depending on

what type of licensure activities you want to pursue and which province you would like to work in, the steps to get there will vary. For more information, visit [PDPA licensure requirements](#).

Bonus content: a word of advice
It is normal to want to do things - “just in case” - we are accountants and therefore want to reduce what we perceive as risk. Here is a scenario I come across a few times per year with candidates:

What if I want to become a partner of a firm and become a CPA without licensure - Should I complete the licensure requirements “just in case” I want to be a partner of a firm later?

Short answer: No. Don’t do it. Many of us think we want to become partners one day and decide not to pursue that path, and I can speak to this from personal experience.

Now go on, attack your elective modules with confidence knowing that you are where you need to be now. You have done so by utilizing effective elective decision-making. See you in the next post!



BY BRYCE CROSS, MFIN, CPA

THREE COMMON MISCONCEPTIONS ABOUT THE CPA PROFESSIONAL EDUCATION PROGRAM

Elective Edition

At CPAWSB's [Learner Support](#), we regularly assist candidates with questions about program requirements and policies (we don't bite, book today!). While some inquiries are unique to individual circumstances, several misconceptions appear frequently enough to warrant clarification.

This post addresses three common misunderstandings we've encountered among learners regarding the CPA Professional Education Program (PEP) elective modules.

Misconception #1: Failing one elective three times results in program withdrawal

The Facts: This is not accurate. According to Volume 1 of the [CPA Harmonized Education Policies \(section 3.7\)](#), while candidates must withdraw from CPA PEP after three unsuccessful attempts at a core module, the rules for elective modules are different.

For elective modules, candidates have three attempts at a specific elective (Finance, Tax, Assurance or Program Management). Therefore, candidates will only be withdrawn from the program if they fail to successfully complete at least two elective modules. For more information on planning your elective modules, check out our 3-part series on elective planning: [Part 1](#), [Part 2](#), [Part 3](#).

Misconception #2: The Tax and Assurance electives are required to

work on audit or review engagements

The Facts: These elective modules (or [completion of the post-designation public accounting examination](#)) are only required for those seeking licensure as a public accountant. While an unlicensed accountant cannot serve as the engagement partner signing an audit or review opinion, they are permitted to work as part of the audit or review engagement team.

Misconception #3: Skipping the Assurance and Tax electives permanently closes the door to public accounting licensure

The Facts: Multiple pathways to public accounting licensure exist after completing the CPA designation. Requirements vary by province and depend on the type of services a member intends to offer (compilation, review, or audit). For CPA members seeking to become licensed public accountants, the CPA Western School of Business (CPAWSB) offers a Post-Designation Public Accounting (PDPA) program. Visit our website to learn more [information about PDPA and provincial requirements](#).

Finally, remember: There is no harm in simply asking us a question. If you hear something that seems a little strange, or if you just want to verify that something you heard is true, Learner Support is here to help. [Book with us today](#) – we'd love to hear from you.

PHOTO: BETH JNR | UNSPLASH

Learning to Learn: Building Study Skills & Motivation



BY: DR. SAMANTHA TAYLOR, CPA, CA

SUBMITTING TASKS AFTER REACHING 75% FOR EXAM ELIGIBILITY

In CPA, PEP candidates must attain a 75 percent overall grade to write each [module final exam](#). Action on the discussion boards and in my inbox around weeks 6/7 (when candidates tend to achieve this score) focuses on whether candidates have to keep completing module activities.

To the competitors (athletes, gamers, musicians), I ask you this: Do you wish to participate, or would you like to “win” the module?

- *If you want to participate:* Focusing on the 75 percent exam eligibility score is a solid strategy.
- *If you want to “win” the module:* Develop your technical and enabling skills for the entirety of the module. Do not pause your efforts once your participation is confirmed.

Exam eligibility is the by-product of natural module progression

There is no need to “game” the system to maximize points (e.g., spending more time on practice cases). It is essential to write in exam-like conditions as there is no extra time on exam day. [Objection 4](#)

noted in a previous post about practice exams provides comfort if candidates remain skeptical: the math is in your favour when incurring a series of NAs, NCs, RCs on your practice cases.

Earning your 75 percent is a by-product of preparing for the exam; it need not be the goal.

But I want to focus on STUDYING!

Some candidates will continue to push, saying they wish to qualify for the module exam so they can stop submitting assignments sets (PCs, IPs, and MCQs) to “focus on studying for the final exam.” What exactly does that mean? The technical aspects in the module are parts of the exam material; by completing assignment sets 1 through 8, you are studying for the final exam.

Active learning is (effective) studying

Perhaps the issue is “doing” (completing activities) is not perceived as studying. Module activities are precisely the type of [active learning that combats mind-wandering](#) leading to effective knowledge retention.

Active learning? It depends. Are you passively watching, or even writing notes that repeat, not interpret the messaging? Then no. Active learning requires the application of knowledge.

What is unique about CPA PEP assignment sets is they include at least three active-learning opportunities: IP, PCs, and MCQs. Further, candidates receive tailored feedback (auto-graded MCQs and facilitator feedback on IPs and PCs) to ensure the “doing” is guided with accuracy.

What are the alternative actions?

To all the candidates who inquire whether they have to complete the assignment sets after achieving an overall course grade of 75 percent, my cheeky response that will never leave my inbox is “No, just like you do not have to pass the final exam.”

What I really want to convey is this: If you are not completing active-learning activities tailored to your exam success, what are you doing?

If you are doing something else that will better serve you on exam day, I say go for it. You do not need my, or anyone else’s, permission to take ownership in your education; This is a graduate-level program where the onus is on you to take the steps necessary to achieve your goals.

Final thoughts

This process is exhausting with heaps of opportunity costs. But it’s worth it. Society does not pass out six-figure paychecks and international job opportunities to just anyone, so CPA will not pass just anyone.

***Hard choices,
easy life.
Easy choices,
hard life.***

- Jerzy Gregorek, as tweeted by Tim Ferris November 4, 2020

BY: DR. SAMANTHA TAYLOR, CPA, CA

ARTIFICIAL INTELLIGENCE & EATING EXPIRED CHICKEN

The necessity of developing CPA professional judgment

There is something magical about artificial intelligence (AI). I can enter the contents of my fridge into a large language model (LLM, e.g., ChatGPT) and ask it to give me three dinner options based on my past preferences. In less than three seconds, voila!

I can then decide that, of the three options given, chicken shawarma bowls have narrowly beaten out chicken Greek salad and barbeque chicken for my dinner tonight.

A quick resolution and an AI win...except that ChatGPT did not ask if my chicken was expired, and I didn't think to look to see if it was. So, while my mental strain was low, the consequences deemed the overall effort a net loss. Sigh.

This post is about AI and CPA professional judgment. It addresses the gray area that CPA candidates are navigating; a time that while [there are rules](#) to what [you can and cannot do with AI](#), there are also areas where candidates can, but likely shouldn't, use AI. Let's discuss the gray area.

Research

Pre-LLM, an [experienced facilitator](#) had asked me to review their marking of a candidate's submission. It was a well-written tax assignment that, at a high level, looked good, except that it was technically inaccurate.

We later discovered the candidate had used U.S. tax law after Googling the criteria and applying it to the case, resulting in a "Not Addressed" submission.

These days, it is not much better. Research has found that ChatGPTs underperform compared to the average undergrad accounting student ^[1].

Furthermore, even if LLMs improve over time and until they're allowed in the exam room, I strongly recommend avoiding them for research when writing practice cases.

Practicing under [exam-like conditions](#) is key to developing the skills CPAs need to demonstrate.

[1] [The ChatGPT Artificial Intelligence Chatbot: How Well Does It Answer Accounting Assessment Questions? | Issues in Accounting Education | American Accounting Association](#)




PHOTO: ANDRAS VAS | UNSPLASH

Professional Judgment

The tricky thing about professional judgment is that this knowledge cannot be read in a textbook, nor found in a lecture.

It is a process of change, bit by bit, evolving from where we are to where we want to be; from CPA applicant to CPA member, fulfilling the [CPAWSB vision](#) of transforming from learners into leaders in a diverse and changing world.

[Developing professional judgment can be difficult](#), even frustrating at times.

Recall that you are here in this course not only to pass a course and earn a designation, but also to [build a skillset](#) to [design your life](#). If you want to be a CPA, [there is space for you here at CPAWSB](#).

User-Focused Editing

In CPA PEP, as in real life, writing to [address your user and their needs](#) is important. However, a recent longitudinal study of ChatGPTs ^[2] found that, even when prompted, ChatGPTs, could not consistently address users and their needs. Thus, relying on such a tool requires the application of critical thinking and professional judgment. Otherwise, we would be speaking facts but not actually solving problems, which would be inconsistent with [CPAWSB's values](#) of excellence and responsiveness.

So, next time you are tempted to rely on an LLM for research, professional judgment, or even editing, I suggest pausing to think about AI and eating expired chicken.

Just because you can do something does not mean you should do it.

[2] Hey ChatGPT—Is a Louis Vuitton Bag an Investment? Evaluating LLM Readiness for Use in Financial Literacy and Education | Journal of Emerging Technologies in Accounting | American Accounting Association

THE IMPORTANCE OF VETTING YOUR SOURCES

You've probably heard "If it is too good to be true, it usually is." Unless you receive info from a CPA Canada or CPAWSB resource, it is secondary evidence. What does this mean? It means that while the information you have may be comforting (i.e., do x and y to pass), it is not verifiable. In other words, listen to that advice at your own risk.

I promise you if CPAWSB or CPA Canada could confirm specific actions to guarantee success, they would, and it would be shared with you directly, not via some secondary source or unverifiable rumour.

Assess the quality of the source

- Is this information directly from CPAWSB or CPA Canada?
 - » If so, it is verifiable and reliable.
- Is there a conflict of interest or incentive from the source?
 - » Someone benefiting from providing the advice does not necessarily mean it is "bad" advice, but understanding their motivation provides additional context.
- Does the source link to CPAWSB or CPA Canada information?
 - » If so, this should give you comfort

that you are using verifiable and reliable information.

Why you shouldn't listen to rumours?

We only have so much time and energy. Ask yourself whether your time is well spent listening to or seeking guidance that may feel comforting, but is not verifiable. What is the risk? When listening and acting based on unsubstantiated hear-say (rumours) or outdated information, you risk unfavourable results and negatively impacting your self-confidence when you realize your mistake.

I suggest focusing on relevant information and [CPA PEP guidance](#), including writing and [debriefing assignment sets](#) and [studying technical material](#) while considering [practical tactics](#) and [time-saving tools](#).

Beware the well-intentioned source

If the information comes from someone who is not quoting a primary source but is someone who you aspire to be and who is without conflict of interest, I ask you to do one more thing:

Trust, yet verify:

- Direct technical questions and questions about module success to the discussion board. It is monitored by CPAWSB and senior policy officials. You can consider the discussion board a primary source.
- Direct registration questions to cpamodule@cpaweb.ca.

Professional judgment

Our value as CPAs is not our ability to add large strings of numbers or multiply by a fraction. Instead, our value comes from being comfortable assessing new and complex situations, breaking down the problems, analyzing those problems, concluding and advising, all while being effective communicators and ensuring our CPA mindset is in place.

Real-life: There are no assurances

In a professional program, we develop professionals, which includes coaching candidates to continue to build their professional judgement. There are no certainties (i.e. if I do 'x' I will get 'y') so any exam built on certainties would not develop the type of professionals who are able to be proficient CPAs.

Start now

You simply can't say "I will learn this later after I pass the exam". Instead, learning how to sit with uncertainty, to put

yourself in the best position given the available information, and to maximize your opportunity within that moment is part of becoming a CPA.

We set goals, we break the goals to sub-goals, [we create a plan using available resources](#), then we execute our plan to the best of our ability. We work the process. If we look for shortcuts now, maybe it works, maybe it doesn't.

If you decide to gamble and use unvetted sources, get lucky and pass, let me ask you this: When will you start putting in the work, relying on vetted experts, and getting comfortable with uncertainty? When will you decide to start being the professional you want to become?

***If you aren't
already on that
path, I suggest
starting now.***

PHOTO: NICHOLAS SAMPSON | UNSPLASH

BY: DR. SAMANTHA TAYLOR, CPA, CA

GOT MOTIVATION?



No Mo'

While gaining practical experience, I used music to spark my motivation (you know, that “mo’”). Whether it was Britney Spears who encouraged me to write my practice cases or Limp Bizkit helping me prioritize, their melodies often helped me [refocus daily actions](#).

Growing up, we often read *The Little Engine that Could* (Ong, 1988). My parents insisted I repeat, alongside the narrator, “I think I can, I THINK I CAN,” encouraging me to link positive thought to accomplishing goals.

Defining Mo'

Psychologist Albert Bandura defines self-efficacy as a personal judgment of “how well one can execute courses of action required to deal with prospective situations.” (Werner 2008) elaborates on Bandura’s work, explaining a strong sense of personal efficacy as a driving force behind any achievement. Without it, there is little open-mindedness to new ideas, willingness to reflect on ones’ own plans, or motivation and confidence in becoming proactive.

I would like to explore how to silence what Stephen Pressfield has termed “the resistance,” a force that creeps into your mind and tells you that “this time is different; this time, you cannot succeed”. Perhaps if we can work to understand the resistance, we may turn up the volume of self-efficacy to overpower it.

If you think you can, you will.


Mo' PEP

CPA Canada designs CPA PEP modules to provide candidates with incremental opportunities of applied knowledge activities to fight that resistance, which is why it is crucial to incorporate [PEP materials](#) while adhering to [time constraints](#) and [using best case writing practices](#).

That way when you are in your exam, a difficult work situation, or another unexpected challenge, you can find peace knowing that you have put in the focused practice building your self-efficacy muscle.

Re-Defining Mo'

Will there be bumps?? Yes! And you are not alone. Princeton Assistant Professor Johannes Haushofer shared his openly by publishing his [CV of Failures](#). One may find reframing helpful, to provide a different lens in which to see the same actions or results. “Seven fall, eight getting up” is a Japanese proverb reminding us the only failure is quitting.



**You can.
You will.**

CPA COPYRIGHT MATERIALS: WHEN SHARING IS NOT CARING

Confession time: I am an only child. My default action is not to share. I was socialized later in life to share scissors, snacks, and smiles in order to “pass” first grade. I digress.

Collaboration is cool

CPAWSB [encourages candidates to collaborate](#). That is not what this post wishes to explore.

Rather, I will discuss the difference between plagiarism and copyright, and how to ensure CPAWSB learners adhere to the professional standards and proper use of CPA PREP and PEP materials.

Define and determine

Merriam-Webster states plagiarism is the stealing of ideas and passing them off as their own without appropriate attribution, while defining copyright as, “the exclusive legal right to reproduce, publish, sell, or distribute the matter and form of something (such as a literary, musical, or artistic work).”

Using CPA Canada’s eBook in a submission without referencing would be considered plagiarism; distributing a CPA PEP solution in a group chat, even if all

of the participants were likely CPAWSB candidates, would be considered copyright violation.

Examining examples

Did you know that it is never okay to share your assignment with another student? Prior to your submission, sharing your work product could be violation of plagiarism rules; once you have submitted your assignment that word product becomes CPA copyrighted materials.

Candidates do not have the authority to distribute copyright materials to anyone without prior and explicit permission to do so. When it comes to third-party tutor or material sharing websites (such as Course Hero), receiving and submitting work that is not your own would be considered plagiarism, while sharing CPA materials would be considered copyright violation.

Penalty and punishment

Violations of plagiarism and copyright result in learners breaching their CPAWSB agreement, the documents signed when registering for CPAWSB courses.

Penalties may include, and are not limited to, failure in CPA courses/modules (need to repeat the entire course/module), an approved ethics course successfully passed through a recognized Post-Secondary Institution, suspension, or even expulsion.

Ask before you act

Not sure if your action is permitted? Post a question to your facilitator, discussion board, or email outreach@cpawsb.ca. Simply not knowing you are violating a policy is insufficient and you will be held responsible for your actions. Each provincial body has its own Rules of Professional Conduct and you are held to the same standards as CPA members.

If you become aware of someone who is using materials in an unauthorized way (plagiarism) or sharing CPA copyright materials (copyright violation), you are obligated to share this information with CPAWSB by contacting outreach@cpawsb.ca.

Reinforcing reminder

Our ability to serve the public interest as CPAs comes from always doing the right thing when no one is watching and unlikely to find out about our naughty or negligent actions. Do not disrespect yourself, your hard work, or the profession you are working hard to be a part of by violating policy and standards.

Friendly finale

For those of you keeping score, we want to maintain the lessons learned earlier in life (sharing scissors and smiles) and add in a few items that are not meant to be shared: Samantha's snacks and CPA copyright materials.



TIPS FOR A BETTER RESPONSE: CASE WRITING

Have you ever looked at a website, a memo, or an article that was lines of unbroken text and thought ‘ugh,’ then stopped reading? No one wants to read large chunks of text; we prefer short, bite-sized pieces of info that get to the heart of the matter. The users in your submissions feel the same! Below are some ideas on how to improve your case submissions (and as a bonus, most apply to your regular work, too!).

These are the key tenets for successful qualitative discussions:

Balanced discussion

You need to have a balanced discussion to get to C (competent). This means points for both pros and cons, or risks and opportunities. If you only discuss one side (i.e. only the risks with a certain decision), then you are what we call a ‘biased jumper.’ Virtually all cases will have both pros and cons for qualitative discussions, so don’t ignore the case facts! It is hard to be objective and see all angles of an issue; showing objectivity is a key skill for CPAs to develop.

If you use bullets (see below), then it becomes easy to see that you have roughly an even number of pros and

cons. Don’t stress if they are not perfectly even; we are looking for a rough balance here.

I feel like I am a salesperson for subheadings. I don’t get a commission for recommending them, but they are a small, yet powerful tool to help organize your response. First, it looks professional. Second, it demonstrates to your user that you know what a pro versus a con is.

QQC

Almost every time you prepare a quantitative assessment, the next thing to do is discuss the qualitative. QQC stands for Quantitative, Qualitative, Conclusion. CPAs cannot live and die by the numbers alone! This comes back to having a balanced discussion and being objective, as discussed above.

Bullets

- If you are not using bullets, I encourage you to try them. It is easier for your user (and exam marker and a happy marker is a generous marker). When you have your CPA designation, you won’t need to worry about exam marking, but you will need to write for real-life users.

Each bullet should cover one idea, and when used effectively, bullets should help keep your writing concise.

- Bullets are also awesome for WIR (weakness, implication, recommendation) analysis. If you have a separate bullet for each of the W, I, R points, then you will remember to address each of the components.

Explain the WHY

Without a doubt, this is the hardest part of the qualitative for candidates. You can see the case fact, tell your user it is a con (for example), but not WHY it is a con. In case writing, we often say ‘so what?’. If the case fact is that there is a penalty for late deliveries of goods, you will not get to “competent” for restating this. So what if there is a penalty? To you, it is obvious why this is a problem, but not to your user. You need to state, for example, that the penalty is a con because it can impact the profitability of the proposal.

Incorporating enough case facts

Remember that virtually everything in a case can be used in your response. Don’t ignore case facts! Ask ‘how can I use this info in my response?’ and then slot it into one of the requireds in your outline so you can incorporate it into your memo. Everything is there for a reason!

Tailoring your response for your user

Your user can google the tax implications, Handbook section, etc. for their problem. The value that CPAs bring to the table is interpreting the technical information and applying it to their user’s specific situation. If I go to my lawyer for a real estate transaction, I don’t want them to tell me every technical detail related to buying a house. I want them to tell me the technical as it applies to my unique situation.

- While you likely have a lot of knowledge about a particular topic, remember that your user may not be as excited about section 85 rollovers as you are! They don’t want a technical dump in detailed ‘accountancy lingo,’ so make it easy for them to understand, and incorporate as many case facts as you can! That way, your user knows the memo was written for them and not another user.

Recommendations

Your recommendation should be crystal clear, not wishy-washy. A good recommendation is, “I recommend you proceed with the investment because the quantitative results are positive, and the pros outweigh the cons. Specifically.....” (and then you can justify a few pros that support the qualitative).

PHOTO: BROOKE CAGLE | UNSPLASH



A wishy-washy recommendation is, “You could go ahead with the investment, but you need to think about X first.” Make a clear recommendation!

- Consistency: your recommendation needs to be consistent with the quant. If you calculate a negative NPV, for example, then your recommendation should acknowledge this. It looks weird if you have a poor quantitative result yet recommend proceeding. The only time we should do this is if the qualitative factors outweigh the poor quant results.
- Highlight recommendations! It is easy to miss one if it is not highlighted. I like to use a Recommendation heading and discuss each recommendation underneath, using sub-headings if needed. You can copy and paste the sub-heading for all your requires to save a bit of time.

(AN ANECDOTE TO) PANIC IN THE EXAM CENTRE

Sometimes I anonymously share emails from my CPA PEP candidates and my response to their queries. For example, this blog post discusses an email I received on how to [manage stress](#), and this one is about [having the “right” accounting personality](#).

I do this for many reasons, including demystifying professional accounting education for both current and aspiring learners.

My latest email comes from a candidate worried about their upcoming examination and it is a common concern shared by many candidates.

Candidate email: That last PC was rough! Thankfully, I did better than I thought - but did panic when I opened it. What should I do if I panic at the exam centre??!!

My response: Thanks for reaching out! I suggest that to combat the potential for panic at the exam centre, you plan, practice, and (mentally) prepare. Allow me to elaborate.

Plan your case

Consider having a routine to set up your case. This means developing a set way to record your case, outlining it, identifying the key elements on your outline (e.g., user, role, “requireds”, key exhibits, time allocation, and ranking). Then, once you have a plan, you can start writing.

Practice in exam-like conditions

...“Practice like you play” is a sports analogy used to communicate the importance of making gym sessions (the practice) the same intensity as the game you are training for (the play). In the following discussion, I will emphasize the importance of writing cases in exam-like conditions (e.g. a quiet room, within the time limit and only using the same resources provided on exam day) by offering counter-arguments to common objections I’ve heard from candidates over the years.

This excerpt is from a blog post dedicated to this topic: [Practice Like You Play: The Importance of Writing in Exam-Like Conditions](#), and is exactly the same advice I give for candidates to utilize their weekly practice cases for exam preparation.

Prepare your headspace

By taking the above steps, you are training your brain by planning your case using the same tactics each time and then practicing these tactics in exam-like conditions. That way, when you come to the exam room, you effectively tell your brain “Don’t worry, we’ve got this. We are just writing another case. We have been here before.”

Candidate response: Sounds good! I will keep these in mind. Thank you!!

These steps are transferable

Last Saturday, our hot yoga teacher reminded us that practice makes progress. On the mat and off, I must agree. I do not “just” teach this; I live it. [Here is a link](#) to my television media interview.

To improve, I used the above tips and discussion [here](#), and applied them to my scenario to prepare for my next on-camera appearance. Like we advise at CPAWSB, I focused on making small, incremental improvements. Then I gave myself kindness, knowing I was doing my best, [which looks different every day](#). [Here is a link to an interview](#) I gave several months after my first. Not perfect, but perhaps improved.

Practice makes progress.

Closing thoughts

Relating back to managing exam room panic, here is my final tip: If, after all of your prep, you freeze, just do something.

Your something is better than someone’s nothing. If it is a difficult case, there is a chance the standards for what constitutes a C/RC will drop as [CPA Canada does not fail everyone](#).

So, if it is a hard exam, tell yourself, “Good - more ‘easy’ marks up for grabs.” For an intense reminder of this point, I like to watch [this short video](#), from retired Navy SEAL and leadership coach Jocko Willink entitled Good. And what if we are nervous when doing something we want to do well at?

Good. This means we care.

LEARNER INITIATIVE: CORE 1 EXAM PREPARATION

You asked (sometimes shouted!) that you wanted an exam preparation. We listened.

Earlier this fall, we shared a promo video to generate awareness and direct interest to the forthcoming exam prep session.

We thank everyone who joined our Core 1 Exam Prep webinars on November 26 and December 3. Rob Bruce and Nikki Marchiel shared some fantastic tips, including how to tackle the Objective format, approach a case (the retired Sunshine Bicycle Tours case in Unit 6), time management tips, how to write a competent case response, and more.

Couldn't make the sessions or looking to refresh your memory? No problem! We've pulled together short, helpful video clips from those sessions to give you a boost as you prep for your exam.

Check them out on [CPAWSB's YouTube Channel](#):

- [Objective Format - Tips & Tricks](#)
- [How to Approach a Core 1 Exam Case](#)
- [Case Writing - What Makes a Competent Response](#)
- [WIR Approach - Weakness, Implication, Recommendation](#)

- [Case Assessment - What can you expect the assessment to look like?](#)
- [General Study Tips - From Now Until Exam Day](#)

But wait – there's more! We are happy to announce that we will continue to provide and build on this exam prep initiative: Core 1 and a BRAND NEW Core 2 Exam Prep sessions that will be offered to CPAWSB learners registered in the respective modules in Winter 2026.

...And that's not all! We are busy at work developing tailored data-informed initiatives to support learner well-being and success. We are here for this, here for you, and are gearing up for a fabulous 2026 and beyond!

Stay tuned to this blog and CPAWSB social media for upcoming events and support.

Cheers,

Lauren and Sam

BY VISHU HANDA AND LAUREN HEWSON

CORE 2 EXAM PREPARATION

As a continuation of our fall initiatives, Core 1 exam preparation, we're excited to carry that same momentum forward into Core 2.

We are still determined to support you as much as possible on the CPA journey, so let's start!

Firstly, a BIG THANK YOU to everyone who joined our recent Core 2 Exam Prep webinars! Stephen Bergstrom and Erin Marshall led the sessions, sharing valuable insights tailored to the unique demands of Core 2. From understanding how Core 2 differs from Core 1 to tackling MCQs and structuring strong case responses using a retired case, the sessions were designed to help you approach the exam with clarity and confidence.

If you missed the sessions or want a quick refresher, no biggie! We've compiled a series of short, practical video highlights to help reinforce key concepts and strategies as you prepare. You can find them on [CPAWSB's YouTube Channel](#):

- [How the Core 2 Exam is Different from Core 1](#)

- [How to Approach the MCQs and the Case in Core 2](#)
- [Tips to Outline an Exam Case in Core 2](#)
- [Core 2 - Stress Management Tips](#)
- [Core 2 - How to Study for the MCQs](#)

What's next?

Looking ahead, we're excited to expand these supports even further BY bringing exam prep to the Assurance and Finance electives in Spring 2026, with Performance Management and Taxation webinars planned for Summer 2026. As always, we're here for you, so don't hesitate to reach out.

Stay tuned to this blog and CPAWSB social media channels for more updates, resources, and upcoming sessions as we continue building toward a strong 2026 and beyond.

Cheers,

Vishu and Lauren

The Capstone and the CFE: Your Final Steps

BY: DR. SAMANTHA TAYLOR, CPA, CA

WHAT THE TIMING?

Significance of Capstone 1 in Relation to Capstone 2 and the CFE

Sometimes I receive questions via emails and discussion board posts from candidates and turn them into blog posts to help others who are in similar situations or have questions.

Here are some of my previous blog posts: [Submitting Tasks After Reaching 75% for Exam Eligibility](#), [Gettin' \(and Stayin'\) PEP-py: Registration Dates and Deadlines](#) and [Letting Go to Gain Control: The Paradox of CPA PEP Stress Management & Exam Laptops](#). Today's post is about how to schedule taking the Capstone modules and write the CFE to ensure optimal study time.

Here is an email from a candidate:

I am planning to write CFE in September instead of May so that I have enough time to go over the study material and be more confident. I just came across the article written by you about the [timings of capstone modules and writing the CFE](#), and I wanted to confirm my understanding.

Would you recommend that I take Capstone 1 in Spring 2024 (May 11 to July 5), followed by Capstone 2 in Summer 2024 (July 20 to September 6)? This way, I would have the months from January to May to review the entire syllabus before starting the Capstones.

Alternatively, would it be better to take Capstone 1 and 2 immediately after completing my current module, leaving me with four months before the CFE? Additionally, could you clarify whether there are any differences between the CFE in May and the one in September, and whether it's a good idea to write the exam in September instead of May?

My response:

To answer your questions, please allow me to provide some additional background, as it really is a personal preference (within the guidance) that will lead you to your best option: CPA PEP designs it such that candidates should take Cap 1, Cap 2, and the CFE back-to-back.

- **Cap 2 Preparation:** While this may feel “rushed,” candidates receive a self-study Cap 2 module at the same time they receive their Cap 1 module. This allows candidates to self-study, say two hours per week (would be plenty!) and then a bit more in between Cap 1 and Cap 2.
- **Cap 2 & CFE Readiness:** [Cap 2 is designed to be preparation for the CFE](#), where 12 - 15 weeks is designed specifically for [applied CFE case writing](#), candidate debriefing (perhaps including peer review, if you so choose and coordinate on your own) and [national formative feedback](#) (much like facilitator feedback).
- **Progressive Skill Development:** The entire CPA PEP program is designed to allow candidates to slowly increase their case writing skills consistent with those skills required for the CFE; thus, [you have been already preparing for the CFE](#) :)
- **Cap 1 and Cap 2 Sequence:** It is designed such that the Cap 1 case rolls into the very next offering of Cap 2, where the Day 1 case is built off of that most recent Cap 1 case, which is then the Day 1 case present on that very next offering of the CFE.



PHOTO: GUILLE ALVAREZ | UNSPLASH

BY: MANDEEP BAINS CPA, CA

CFE TIPS FROM CPAWSB'S EXPERT PANEL OF SUCCESSFUL WRITERS



Every year, I have the privilege of working with a team of dedicated education professionals toward a common goal: preparing candidates for the Common Final Examination (CFE).

And every year, I hear the same question: “What do I really need to know to succeed?”

Recently, I sat down with a panel of successful CFE writers—people who’ve walked the path, faced the pressure, and come out the other side. Their advice was practical, grounded, and full of wisdom. I’ve summarized their top tips below, and I hope they help you feel more prepared, more confident, and more supported.

1. Well-being Isn’t Optional, It’s Foundational

Before you dive into technical prep and case strategy, take care of yourself.

- Go for walks. Move your body. Eat well. Sleep.
- Burnout doesn’t help anyone. Build in breaks and recovery time.

On exam day, reduce stress by:

- Visiting the exam centre beforehand so the route feels familiar.
- Reviewing the CPA exam regulations so there are no surprises.

- Testing earplugs and [your chosen writing instruments](#) during practice cases if you plan to use them.

These small steps can make a huge difference in how you feel walking into the exam.

2. After Each Exam Day: Let Go

This one’s tough, but important. After each day of the CFE:

- Leave the exam centre and don’t linger.
- Don’t rehash the exam with others.
- Avoid Reddit or other platforms [where speculation runs wild](#).

You can’t change what’s done. Focus on what’s ahead. Let go of what you missed and prepare for the next day.

3. Time Management is Everything

Planning your cases is critical. Allocate time to each assessment [opportunity and stick to it](#).

- If you’re running out of time, conclude quickly and move on.
- Don’t get stuck trying to perfect one Assessment Opportunity (AO) at the expense of others.
- Try not to leave any AOs unanswered during the exam

Practice time management, it’s one of the most important skills you’ll need.

4. Tackle Technical Weaknesses Early

If there's a [topic that makes you nervous](#), don't wait.

- Address it now.
- Review it in your study plan.
- Practice it in cases.

You'll feel more confident walking into the exam if you've already faced your weak spots head-on.

5. Use Feedback Guides and Strong Responses

The feedback guides for CFE practice cases are gold.

- They show what “competent” rating looks like.
- They help you understand depth and breadth.
- Review strong candidate responses from Capstone 2—they're realistic and achievable.

Use these tools to calibrate your expectations and improve your writing.

6. Simulate Exam Conditions

When you practice prior CFE exams:

- Do it in exam-like conditions.
- Stick to the actual CFE time slots.

This helps you build stamina and get used to the rhythm of the real thing.

7. Track Your Technical Progress

Create a [spreadsheet or tracker](#) to monitor your technical areas.

- What have you covered?
- What needs more work?
- What keeps showing up in your cases?
- Tracking helps you stay organized and focused. It's also a great confidence booster when you see how far you've come.

Final Thoughts

The CFE is a big moment—but it's just one moment in your journey to becoming a CPA. Prepare well, take care of yourself, and trust the process. You've got this.

If you have questions or want to talk through your prep strategy, reach out to Learner Support or post in the Candidate Discussion forum. We're here to support you.

PHOTO: LOUIS PAULIN | UNSPLASH

Beyond the CFE: Building Your CPA Career

CAREER PROGRESSION, PART 1: THE END, A NEW BEGINNING

Career progression. How can someone harness the power of their education? When should one move on? First, I'll discuss why quitting is essential to growth, then how to set yourself up for growth, and conclude with exploring the bigger picture of a CPA and lifestyle design.

Metaphor Soup

Traditionally, career progression has been referred to as “climbing the corporate ladder”, while recent metaphors include a [jungle gym](#) and [coloured parachutes](#). Except, what happens when you don't know if you want a ladder, jungle gym, or parachute?

I often speak on this blog about policy and enabling competencies: Policy, the “hard line” of administrative matters, while enabling competencies acting as the “soft skill” complement to business language. At some point all new CPAs will have fulfilled relatively similar entry-level requirements: education, work experience, evaluative. What differentiates you as a CPA is not what you know, but how well you communicate what you know. The “soft” stuff. Before I dive into practical solutions on how to maximize your

CPA PEP education, I would first like to bring attention to the step before career progression: “quitting”. Moving on from where you are currently at.

Quitting...

- Can be hard: At some point, it is likely you will want to take your designation and open some of the doors you have created for yourself. I recall early on in my career when my colleagues learned I was leaving they were less than supportive or was that my projection of their reaction?
- Not always optional: Economic circumstances may lead to layoffs. A lapse in performance or a misaligned skillset may lead to termination. A contract is not renewed. Own it, learn from it, and try not to take it personally.
- Sounds awful: Except it doesn't have to be. I recently received an email resignation from a lovely human I used to work with on an ongoing project I lead outside CPAWSB. It was gracious, thankful, and confident. She and her contributions will be missed, but it is the right thing for the project because it is the right thing for her.

Time to reframe

Consider quitting the *mindset* of quitting as a “bad” thing. A colleague once told me it is okay to leave a role because you were once happy to take the position and are now making room for someone else to step into their next opportunity.

***Closing time, every new beginning
Comes from some other beginning's end,***
- *Closing Time, Semisonic*



CAREER PROGRESSION, PART 2: CREATE VALUE

In Part 2, we will continue to discuss career progression, concurrently creating value for yourself and others.

Mindset shift: YOU are a business

We know businesses with multiple sources of income tend to be less “risky”. Ideally, those streams of income complement the natural business cycle, like a landscaper who in the winter, plows snow.

As CPAs, we analyze the health of a business, [conclude and advise](#) ways to mitigate risks, yet why do so many of us choose to focus all of our efforts on one source of income?

It is time to talk about practical steps to make the most of where you are, then build on it.

Maximize your current situation

Consider engaging in [Intrapreneurship](#). You can start by creating a new data analytics dashboard and work up to creating a new month-end close macro. Without internal innovations, the [world may not have Post-Its or Gmail](#). If your current company does not recognize

these efforts, place them on your resume and know your next employer will.

Build skills while helping

- ***Part-time consulting***

Consulting is helping. If someone has accounting questions and you have answers, share them. Don’t know something? Admit it, offer to look into it and get back to them. Forget making it transactional and simply help when you can. If you have taken the steps above to treat yourself as a business, you will have time to build relationships, some of which may turn your helpful conversations into bank-able invoices.

- ***Volunteer work***

We have unique skillsets as CPAs: financial literacy. We can review financial statements and see business stories. There are many non-profit boards who could benefit from your expertise, and in turn, offer you a chance to “level-up” your skillset. These skills can be communicated to future employers and clients.

- **Consider your “why”**

As a CPA candidate, [you are choosing](#) to devote evenings and weekends to weekly readings, quizzes, practice cases, and integrated problems to [prepare for a series of exams](#) that culminate in a [three-day marathon exam](#).

What will your investment of efforts be, what doors will you smash through? Where will you take yourself as you journey through your career progression?

**Closing time, open all the doors
And let you out into the world**
-Closing Time, Semisonic



BY: DR. SAMANTHA TAYLOR, CPA, CA

CAREER PROGRESSION, PART 3: MOVING ON

Here I'll discuss how these efforts and options can materialize into your life's plan. No "master plan"? No worries! I'll discuss that, too, and how to put it all together.

Closing time, you don't have to go home, But you can't stay here

-Closing Time, Semisonic

Great: you are confidently solving problems and helping others. Your inbox has activity, your calendar is starting to fill up. What now?

Say "yes..."

As discussed in [Part 2](#) of this series, say yes and volunteer, consult, add value within your organization. Build your skillset and say yes to offers when they come in.

When a project is done, request feedback, reflect, learn, and take those lessons into your next project.

...Until you can't

We each have our limits, and it's important to know when we can tap into our energy reserves and when

we must replenish them. The advice I follow is to say "yes" until I no longer am excited about saying "yes". My lack of enthusiasm indicates I either had too much on the go, or it isn't the right opportunity for me.

Know and respect your limits. [You are the expert of you.](#)



Choose your stress

Popular author [Mark Manson asks us how we'd like to suffer](#). As a new CPA, I chose to work, consult, teach, and volunteer to focus on building skills. I also travelled internationally and had hobbies. Once I attained some preliminary goals, I started to pull back on fixed work commitments and now have more autonomy with how I choose to invest my time.

Nowadays, the types of opportunities that excite me look different than ten years ago and that is a-okay.

You are not your "CPA"

Some CPAs choose to actively use their CPA designations in roles deemed "traditional accounting positions" while others will transition into other roles.



Please do not worry, you will always have those analytical skills, critical thinking, and business acumen you honed studying to become a CPA. Warren Buffet refers to accounting as the language of business.

I encourage you to see your fluency as a tool, a way to add value and communicate, rather than one path. Many CPAs leverage their designation into different fields such as project management, education, real estate development, senior leadership, and entertainment, to name a few. My point: you have options.

Lifestyle Design

Harvard Business Review (2006) noted that although having [more options can lead to improved objective outcomes](#), participants reported a diminished subjective experience.

Participants were unsure if they'd made the right decision because there were so many other choices that could have been made. It is a paradox of choice: we are better off for more options, yet don't always feel like it.

Rather than be frustrated by science, I choose to see the "paradox of choice" as freeing: with so many choices there is no wrong move. If you find yourself no longer aligned with that decision, that's okay!

You can take your experience and skills and select another choice. You have put yourself in a position to take advantage of your abundance of opportunity.

No master plan?

You are in good company. I still don't know "what I want to be when I grow up" and I turned thirty-five in June. Over afternoon chilled beverages many of my accomplished friends and colleagues admit much of the same.

Don't stress. Our brains are masters at [creating a story that will make our career paths look more intentional](#) than perhaps they were.

As discussed above: by becoming a CPA and earning yourself more career options, you will be statistically better off. Enjoy the ride, your hard work, and concentrate on contributing to a life for yourself and those you care about.

“I’ve never planned anything. I haven’t had any career at all. I only have a life”

-Werner Herzog, Author, Educator, Filmmaker, Actor

BY: BARBARA WONG

WANT LICENSURE? WHAT YOU NEED TO KNOW ABOUT THE CPAWSB'S PDPA PROGRAM

Whether you're thinking of pursuing registration for audit, review, or compilation engagements, the PDPA program can help you qualify to practice public accounting post CPA certification.

Two Pathways to Public Accounting

CPAWSB offers two distinct PDPA pathways:

1. [PDPA Module and Exam](#)

Designed for CPAs seeking registration for **audit and review** services or for those in provinces without tiered licensing. This program covers assurance, taxation, financial accounting, finance, and strategy and governance.

2. [PDPA Taxation Module](#)

Intended for CPAs pursuing registration for **compilation services** in provinces with tiered licensing (e.g., British Columbia, Alberta, Manitoba).

If you've recently completed the **CPA PEP Taxation module**, you may already meet the education requirement for compilation registration (experience requirements still apply).

Resources for PDPA Candidates

Before gaining access to the module materials, you will have several learning resources and learner support services available:

Before You Enroll

- [CPA Way Videos](#): Learn the structured approach to case analysis used in CPA exams.
- [CPA Competency Map](#): Refer to [Section 6](#) for knowledge expectations and proficiency levels for each technical competency that will be evaluated.

After You Enroll

You will gain access to self-study resources via [D2L \(Brightspace\)](#), including:

- Introduction to the PEP module: includes Getting started in PDPA and Getting started in Taxation technical review activities, as well as the CPA Canada Learning Library eBooks.

Access to [Knotia](#), along with the following subscriptions:

- CPA Canada Standards and Guidance Collection (exam reference)
- Federal Income Tax Collection (exam reference)
- Excise Tax Act (exam reference)

Once You Are Registered

You will receive access to the PDPA and PDPA Taxation module at the module start date. Refer to the posted [schedules](#) for specific dates.

Learner Support Services

All PDPA candidates also have access to the following learner support services:

- Coaching
- Peer Studying
- Tutoring
- Academic Advising - Questions about educational resources
- General Advising - Concerns about admission, module/exam registration, withdrawals, or deferrals

Ready to take the next step?

Visit the [Post-Designation Education webpage](#) to learn more about admission, registration deadlines, and available resources.

Questions?

Reach out to us at PDPA@cpawsb.ca. For Practical experience related questions and any questions regarding licensing requirements, please reach out to your [governing provincial CPA body](#).

BY: DENISE CHAN, CPA, CA AND DR. SAMANTHA TAYLOR, CPA, CA

CANDIDATE BEST PRACTICE: PART 1 - ADVICE TO PREVENT A PROFESSIONAL CATASTROPHE

As a CPA Candidate, you are bound by the Rules of Professional Conduct, just as a CPA would be. Given our CPA profession is self-regulated, it is logical a core element of that Code is integrity. Below is some advice, evidence, and replies for you to consider when drafting communication with integrity to any person.

In the first part of this two-part mini-series on Candidate Best Practices when it comes to demonstrating effective enabling skills, I will be discussing what NOT to do on the discussion boards. In Part 2, I will suggest why it is in your best interest to work on your enabling skills and some tips on how to manage your development as a professional.

As CPAWSB's Lead Policy Advisor, PEP, I love interacting with facilitators and candidates via our global discussion boards. It truly is a great place to solve problems, explore technical application, and firm up our understanding of all matters policy. Sometimes though, it gets a little 'spicy' out there.

Advice Received

When I first started a more public

stakeholder-facing role with CPAWSB, I remembered a piece of advice one of my management school professors taught us: "If you wouldn't want what you've said/done/written posted on the front page of the news, do not do it."

Similar advice may be offered to candidates: It isn't always what you say and do, but how you say and do it. As a CPA in this role, I have to use my communication skills professionally. My expectation is that you do the same. Let's look at a few sample posts to discuss how NOT to post.

Anecdotal Evidence

Here are some near-examples of messages posted:

#1 Webcam Allergy

I heard we have to keep our cameras on during the workshop - I REFUSE! There is no way this is fair, and it is not acceptable to have us keep the camera on us THE ENTIRE TIME!!! [...] And why do I have to put it on? You can SEE INSIDE MY HOUSE - THAT IS AN INVASION OF PRIVACY.

Sam's Reply:

Given your face would have been shown during an in-person session and you would have been visible the entire time during that session, I fail to see how this is any different. Further, should you need to excuse yourself during the virtual session, similar to how you would do in an in-person workshop, you may get up and leave. We are adults in a professional program and are not minute-counting reasonable washroom or cell phone breaks.

As far as privacy, CPAWSB permits candidates and session leaders to use virtual backgrounds, so there is no need to share anything more than you would, had you been at an in-person workshop. Also, are all those CAPS because you think I cannot hear you? Perhaps if you turned on your webcam, it would help us communicate better...

I encourage you to reflect on why you feel this is an appropriate tone in the context of a professional program. Your goal is to become a self-regulated professional, which requires communicating in all instances: respectfully; appropriately; and with an accurate understanding of the law.

#2 I love hate accounting

This program is too hard! The requirements are NOT reasonable. There is no way anyone can do this case in one

hour. This is \$#^%\$!

Sam's reply:

This is a [challenging program](#). Many have felt similar to you and have become CPAs. It is essential to utilize your [CPA PEP resources](#) and focus on a manageable plan, while acknowledging this program is difficult. That said, please remember that this is a discussion board used by hundreds, if not thousands of CPA candidates, where the best use of this resource is to focus on technical course material and policy-related matters. Should you wish to discuss strategies to make this program more [manageable](#), I suggest contacting learnersupport@cpawsb.ca.

And if it is simply a case of “I don't-feel-like-its” – I get that too. Consider replenishing your [motivation](#) with some [self-care](#).

The end (for now)

Part of this program is designed to replicate challenges you will face in your career as a self-regulated professional. Often, the public – clients, employers, or stakeholders – will expect more of you than you believe to be reasonable. Your abilities will be tested once you are a CPA as well. In Part 2 of this series, I will suggest why it is in your best interest to work on your enabling skills and some tips on managing your development as a professional.

CANDIDATE BEST PRACTICE: PART 2 - ADVICE TO PREVENT A PROFESSIONAL CATASTROPHE

As a CPA Candidate, you are bound by the Rules of Professional Conduct, just as a CPA would be. Given our CPA profession is self-regulated, it is logical a core element of that Code is integrity. Below is some advice, evidence, and replies for you to consider when drafting communication with integrity to any person.

Here in Part 2, I will suggest why it is in your best interest to work on your enabling skills and some tips on how to manage your development as a professional.

Enabling Skills

Here are two reasons why demonstrating a professional tone on the discussion boards is in your best interest:

1. Because it's your job:

Seriously, as a CPA PEP candidate, and as yourself— the human seeking out a professional designation in a self-regulated profession—it is not just the lessons we teach you directly about debits and credits, it's bigger than that. How are you going to operate when things go wrong? Deadlines

missed, budgets blown, sleep a fleeting memory? THAT is the representation and expectation of what a CPA can do. Yes, we operate efficiently and effectively to ensure bad things don't happen. Still, when they do, we step up and solve them. Professionally.

2. You never know who may be reading your post:

Canadian accounting and business is a small world. We work in industry, government, firms, and outside of traditional finance and accounting. Your CPAWSB-leads and facilitators all went through the same or similar designation program, and many of us stayed in touch with our peers. While the candidate guide reminds you of discussion board etiquette, I hope this post reminds you of something more significant: contributing positively to the future you will one day be leading.

Learning Lifelong Lessons

I suggest if you find yourself getting annoyed and angry, write the post you think you want to make in a Word document, save it to your desktop, and sleep on it. Upon waking, read it, and if you still want to post it knowing it represents both the professional you are and the CPA you aspire to be, go ahead and post.

I should mention this is advice I give myself and am still working on. Recently someone I interacted with blew a deadline by a few weeks—without prior communication—and within their tardy reply, had a time-sensitive request. I insta-replied with an email that I soon wished I would have slept on. Was I unprofessional? Not quite, though I wish I had taken the time to wrap my disappointed message in nicer words which is what I would have done had I slept on it. Was I in the right? Perhaps. Does it matter? Not really. There is always an opportunity to choose kindness and to balance honesty with harshness.

And with that...

I will see you on the discussion boards!

PHOTO: NIK SHULIHAIN | UNSPLASH



Support Systems: Tutors, Mentors & Support

BY: DR. SAMANTHA TAYLOR, CPA, CA

MENTORSHIP: THIS IS COFFEE

A hunter and a vegetarian walk into a boardroom for an interview that would lead to the start of my accounting career. I will get to that, but first I want to discuss mentorship.

What is a mentor?

A mentor may be a formal overseer of your work, someone who satisfies your professional education requirements, your mentor may also be the person who helps polish your business acumen. Without my mentor, I would have continued to answer that pesky interview question, “what is your greatest strength” by describing my ability to demolish a larger competitor on the rugby pitch.

In CPA PEP, formal mentorship in the form of a “CPA Mentor” is a required part of completing the [CPA PEP Practical Experience Requirements](#).

What a mentor is not

A mentor is not someone who:

- Judges or discourages you; as CPAs, we ought to [use our power positively](#),
- Has all the answers, though a mentor may be a part of the mentees’ [active reflection process](#).

- Knows what is on the examination, though you may refer to [exam-specific guidance](#).

The value of a mentor

This [journey is difficult](#). Despite [several well-curated resources](#), candidates often get frustrated with the transition from post-secondary undergraduate learning to graduate-level education. A mentor may offer perspective or perhaps a virtual “pat on the shoulder”. They may email to let you know they too have at times struggled while acknowledging they are now stronger having endured those difficult times. A mentor may provide you practical tips and resources for support to best navigate those difficult times now.

While mentors may offer support, guidance, and motivation, it is David Foster Wallace who reminds us we possess the knowledge, the ability to learn and know, and the freedom to decide what to think about.

Candidates, [you are more powerful than you may think](#).

Where to find your mentor:

At work

Many offices support CPA learners with a formal mentorship program. Even if there is not a formal network in place, your workplace may employ someone who is looking to give back to the profession and is more than happy to support your pursuit of a CPA designation.

Outside the office

Get creative! It could be a CPA you volunteer with, play with on a sports team, or a connection via LinkedIn. Yes, in this COVID-19 environment there are some limitations to in-person social interactions however at the same time, it has been the experience of many of my colleagues and learners that people have been open and available more now than ever to meet for a virtual coffee.

Retain a match-maker

CPA Canada offers a [CPA Mentor Match](#) program for learners to complete their experience requirements. Do not discount good fortune: Serendipity may offer a mentor in other ways not discussed here. Candidates and educators who found their mentor through other means, what is your story?

Great, you found a mentor. Now how do you “keep” them?

Simple. Thank them and occasionally offer to buy them coffee.

A hunter and a vegetarian walk into a boardroom. Fifteen years later, two Chartered Professional Accountants walk out. Thank you, Rodney.

BY: DR. SAMANTHA TAYLOR, CPA, CA

CANDIDATE SURVEY FEEDBACK: WHERE DOES IT GO?

With demands from school, work, family, perhaps even a few unimpaired friendships, a candidate's most valuable asset is often time, and we accounting educators understand this. Today, I'm sharing where your survey feedback goes and why the time you spend providing that feedback has value. You are asked to complete two surveys during each module: a workshop survey and a module-end survey.

Workshop survey

The workshop survey has three main parts: logistics, materials, and instruction. The survey link is in the subsequent weeks' activities and time permitting, your session leader will give you time on Sunday afternoon to complete it.

Module-end survey

Similar to the workshop survey, the module-end survey consists of sections for feedback on module materials and the delivery of those materials. The focus of the module-end survey is to evaluate the online portion of CPA PEP's blended learning environment, which is why there is no section for location logistics. A link to this survey will be in the final weeks' activities.

How feedback is used

CPA PEP is nationally developed, regionally delivered; the facilities where the workshop takes place (logistics) and who delivers the materials (instruction) are managed by CPAWSB, while the activities (materials) are created by CPA Canada.

Location

CPAWSB's logistics department reviews candidates' feedback to assess future workshop locations. By providing an honest assessment as to the adequacy of your weekend workshop, CPAWSB will ensure that candidates have access to an environment conducive to maximizing your learning experience.

Instruction

Feedback on instruction contributes to the future hiring of session leaders and online facilitators (hereafter referred to interchangeably as "educators"). Your feedback has a direct and immediate impact on the level of education future CPA PEP candidates receive. Qualitative feedback is reviewed by CPAWSB management; positive feedback is used to support future hiring decisions;

constructive feedback including instances of policy violation, is used for training and coaching purposes. Each educator receives a score based on the quantitative score. That score is organized by module and session type (e.g. a session leader may have a score for Capstone 1 and Taxation; an online facilitator may have a score for Assurance only). CPAWSB's Director, Contractor Management, will staff according to highest-scoring educators while factoring in location when staffing the workshops. This process was developed to ensure candidates are receiving a high-level of effective instruction.

Materials

Educators do not have control over CPA PEP materials. In fact, they are under strict instruction not to alter the materials or supplement them with their own. Should an educator provide you technical material outside of the materials in the course, that action is considered a policy violation and candidates should note such instances in their qualitative feedback for delivery of instruction. Feedback on module materials goes directly to CPA Canada and is used to shape future module revisions. Keep in mind, each module (Core, Elective, and Capstone) follows a different development cycle, meaning some feedback may not be implemented until the next development cycle begins for that module. However, depending on

the topic, I have seen candidate feedback implemented promptly by CPA Canada.

Educator and management accountability

Candidate survey feedback was used to develop [Experienced Facilitator Training](#). Also, there is an evaluation of CPAWSB CPA PEP Management based on overall candidate satisfaction. A comprehensive system exists to ensure as stakeholders, the collective candidate voice has the power for measurable impact.

If you have more feedback Send it here...

If you have feedback that falls outside the module-end or workshop surveys, consider emailing cpamodule@cpawsb.ca. Our team will reply during regular business hours. If you have concerns about your facilitator, review the guidance in your [Candidate Guide](#) for guidance.

...But not here

CPA Canada's IT support team is the appropriate place to log a helpdesk ticket to resolve your technical issues. IT specialists manage the support line. Similarly, module discussion boards are moderated by lead facilitators hired by CPAWSB who answer technical and policy-related questions. Systems are not in place for IT specialists or lead facilitators to turn feedback they receive into actionable solutions.

BY: MELISSA DOREY

**WE'RE HERE TO SUPPORT YOUR
CPA JOURNEY: YOUR SUCCESS IS
MORE THAN GRADES**
It's About Balance Too



At CPA Western School of Business, we know that working through your modules can feel like a lot to balance. That's why our CPAWSB Learner Support team is here to help you build both the technical and enabling competencies that you need to succeed through the CPA program. Whether you're looking for extra guidance, a study buddy, or help staying on track with module requirements, we've got you covered.

What learner support services are available for candidates to access?

Here are a few of the ways you can lean on us throughout the CPA program:

Tutoring

CPAWSB provides learners with the opportunity to connect with tutors (CPA members; post-secondary educators; recent successful CFE writers) who are familiar with the CPA certification program and are willing and available to provide paid [tutoring services](#).

Get connected with our [CPAWSB Tutor List](#) to find extra one-on-one support.

Peer Studying

Many learners find having a [study partner](#), whether in-person or online, is an excellent source of support. [Request to join a Peer Study group](#) for your upcoming CPA PEP module and collaborate with other candidates.

Assignment Extensions

Sometimes things happen outside of your control, and meeting deadlines becomes difficult. If you're unable to submit an assignment due to extenuating circumstances, you can request an [assignment extension](#) by completing the [Extension Request Form](#).

Academic Advising

Sometimes you might have bigger questions about your CPA pathway—like how module timelines fit with your work schedule, what to do if you're falling behind, or which next steps make the most sense for your journey. That's where our [Academic Advising service](#) comes in.

Our advisors can help you:

- Explore your options for module planning
- Understand program requirements
- Navigate challenges that could affect your progression
- Make informed decisions about your path to designation

If you'd like to connect with a CPAWSB advisor, you can request additional details by completing the [CPAWSB Request form](#).

Academic Eligibility

To be eligible to write the module-end examination, remember that you'll need to:

- Maintain an overall module grade of 75% or higher
- Attend your module workshop

We know keeping track of your marks week by week can be stressful, so we've created a handy breakdown to help you monitor your progress. You can check out the [Academic Eligibility webpage](#) for more.

Mental Health and Well-being


Working toward your CPA designation is a big commitment, and it's completely normal to feel stressed, overwhelmed, or even burnt out at times.

You're not alone in feeling this way—many candidates experience the same challenges while balancing studies, work, and life.

That's why CPAWSB provides mental health and wellness resources to support you. Whether you're looking for strategies to manage stress, tips to improve balance, or someone to talk to, these resources are here to help you take care of yourself while you work toward your goals.

And remember—it's always okay to reach out early, before stress builds up. Taking small steps to care for your mental health along the way can make a big difference.

You can [explore available wellness support](#) depending on your location.



Our goal is to make sure you always feel supported, connected, and confident in your CPAWSB journey.

If you have any additional questions about tutoring, peer studying, academic eligibility, academic advising, or wellness resources, please don't hesitate to reach out to the Learner Support team at learnersupport@cpawsb.ca—we're always happy to help.

NEW CPA PROFESSIONAL PROGRAM

The CPA profession in Canada is moving to a new CPA Professional Program, which will replace the current CPA Professional Education Program (CPA PEP) in 2028. While many candidates will be able to complete CPA PEP as planned, others may have the option to transition to the new program, depending on their individual circumstances and where they are in their CPA journey.

Program changes can feel overwhelming, and you may have questions about what this transition means for you, including the following:

1. Where can I learn about the new CPA Professional Program?
2. When does the program begin?
3. Can I stay in the current program, or do I need to transition?
4. When do I need to transition?
5. What are the new modules, fees and timeline under the new program?

6. When will the current CPA Professional Education Program end?

7. Will the module(s) and experience I completed be transferred?

8. Whom can I contact for guidance?

For the most current information, transition options, and personalized guidance, candidates should refer to the [CPAWSB website](#).



ACKNOWLEDGEMENTS

About the Authors

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Barbara is the Operations Lead of Post-Designation Education at the CPA Western School of Business. She supports CPA members through their learner journey from prospect through to graduate. With a dual focus on operational excellence and learner support, Barbara works to streamline processes, remove barriers, and enhance systems that directly impact the learner experience.

Bryce Cross, MFin, CPA

Bryce enjoys connecting with learners as an Academic Advisor and collaborating with colleagues while leading Special Projects at the CPA Western School of Business. When he's not immersed in all things CPA, Bryce lectures in accounting and pursues his PhD at Saint Mary's University. Outside of work, he loves exploring international cuisine and hitting the trails, his way of "touching grass" and finding balance.

Lauren Hewson

Lauren is the manager for Learner Initiatives and part of the Learner Support Team at CPAWSB. She works hard to design and implement programming that helps candidates succeed in the CPA certification program. Lauren is passionate about creating inclusive, data-informed learning experiences that empower learners to reach their goals.

Mandeep Bains, CPA, CA

Mandeep is the Manager, Learner Support at CPAWSB. He advises candidates throughout their CPA PEP journey, helping them navigate challenges and build confidence. Mandeep draws on his experience as a CPA and professional education leader to offer practical, grounded advice tailored to each learner's needs.

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Melissa is the Operations Lead, Learner Support at the CPA Western School of Business. She helps support candidates through their

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Nikki is a long time CPAWSB session leader, facilitator and mentor to other facilitators.

Dr. Samantha Taylor, PME, CPA, CA

Dr. Samantha Taylor, CPA, CA, is the Director, Innovation & Learner Success at CPAWSB. Having worked as a tenured university instructor, public company CFO, and long-time educator with CPAWSB, she blends academic insights, real-world experience, and institutional knowledge to support learner well-being and success.

Vishu Handa

Vishu was an Intern on the Learner Initiatives team at CPA Western School of Business while completing his final courses at Dalhousie University. He brings prior audit co-op experience from KPMG and is going on to study at the University of Toronto in the GDipPA program and pursue the CPA designation.

About the Editors

Donna Boniel

Donna is the Communication Assistant at the CPAWSB. She supports the School's digital presence by leading graphic design production and creating engaging social media content. With an eye for visual storytelling and brand consistency, Donna helps bring CPAWSB's messaging to life across digital platforms.

Swetha Laguduva

Swetha is the Communication Coordinator at the CPAWSB. She manages website content, oversees digital communications, and contributes to social media strategy. Swetha focuses on ensuring the CPAWSB website remains user-friendly and accessible, using analytics and continuous improvement to optimize the online experience for learners and members.



CONTACT US

Admission Advising for New Learners

Accessing and navigating your My CPA online profile

1 866 420.2350, ext. 6001#
admissionadvising@cpaweb.ca

Program enrollment processes including requesting a transcript assessment, and general questions regarding CPA PEP, and CPA preparatory courses

Your in-progress or completed transcript assessment including questions about documents being submitted, the status of your transcript assessment, your transcript assessment results, and any other questions pertaining to your assessment.

1 866 420.2350 ext. 6001#
transcriptassessment@cpaweb.ca

Assistance and Advising for Students

Students have applied to and been accepted into CPA preparatory courses.

Applying for entry into CPA preparatory courses, enrolling in courses, temporary or permanent program withdrawals, and annual student dues

prepadvising@cpaweb.ca

CPA preparatory courses currently in session, including questions about quizzes and projects, module withdrawals, grading, and program policy appeals

prepadvising@cpaweb.ca

CPA preparatory course exams, including questions about accommodations, and special consideration requests

prepexams@cpaweb.ca

General student advising, including assistance with course planning, academic prerequisites, and obtaining appendix letters for study permit requirements

prepadvising@cpaweb.ca

CONTACT US

Assistance and Advising for Candidates

Candidates have applied to and been accepted into the CPA Professional Education Program (CPA PEP).

Applying for entry into CPA PEP, temporary or permanent program withdrawals, transferring from another region and annual student dues

cpaapplication@cpaweb.ca

Enrolling in CPA PEP modules, including registrations and withdrawals, schedules, key dates, and evaluations

cpamodule@cpaweb.ca

Accommodations for CPA PEP workshops and exams

cpaaccommodations@cpaweb.ca

CPA PEP extensions

cpaextensions@cpaweb.ca

Questions from MOU international designates about assessments/documentation, practical experience, entry to PEP, and program placement

cpaapplication@cpaweb.ca

Questions about the CPA Professional Program

cpaprogram@cpaweb.ca

Provincial CPA Organizations

Are you looking for information about becoming a CPA? Contact your provincial CPA organization and ask to speak with a business development officer. Provincial CPA bodies also have information about [practical experience](#), mentorship, career services, volunteer opportunities and upcoming provincial CPA information sessions and events.

CPA Canada Offices

For information about CPA Canada services, support, and contact information, see [Contact CPA Canada](#).



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info@cpawsb.ca | www.cpawsb.ca

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“Success is no accident. It is hard work, perseverance, learning, studying, sacrifice, and most of all, love of what you are doing or learning to do.”

— Pelé