FVCPAA
FRASER VALLEY CHARTERED PROFESSIONAL ACCOUNTANTS ASSOCIATION

14TH ANNUAL FVCPAA Conference

NOVEMBER 19, 2026



Leadership, Legacy & the Future of the CPA Profession

fvcpaa.ca

A Message from the President



Barry McLean
FVCPAA President

Welcome to the 2026 Fraser Valley Chartered Professional Accountants Association Annual Conference.

As I begin my first term as President, I'm pleased to welcome our members, guests, speakers, and sponsors, both in person and online. Thank you for taking the time to invest in your professional development and connect with our accounting community.

For many of us, verifiable professional development hours are an important reason to attend. But the value of this conference extends well beyond those requirements. Today is an opportunity to exchange ideas, broaden our perspectives, and strengthen the relationships that support us throughout our careers.

I encourage you to reconnect with familiar colleagues and introduce yourself to someone new. Step outside your usual circle, share a conversation over lunch, or join us at our closing reception. If you're participating virtually, consider reaching out to a fellow CPA you haven't spoken with recently. Those connections can be just as valuable as the sessions themselves.

Having spent 35 years working in industry, I've always appreciated the breadth of topics this conference offers. Our daily responsibilities naturally lead us to develop expertise in particular areas, but developments beyond that focus can affect our organizations, clients, suppliers, and families. Recognizing an emerging issue and knowing an expert to call is an important part of being an effective advisor.

Early in my career as a controller, I worked with a highly capable accountant who initially believed he could avoid learning to use computers. When he eventually tried to catch up, the adjustment was far more difficult than it needed to be. That experience has stayed with me as a reminder to remain curious, embrace learning, and respond to change. As technology and our profession continue to evolve, that lesson feels especially relevant.

Our conference would not be possible without the generous support of our sponsors. Thank you for investing in our professional community and helping us deliver opportunities to learn and connect.

Our scholarship program is another important part of that community. By supporting students pursuing their education, we help encourage the next generation of accounting professionals. Thank you to everyone whose involvement and support help make this work possible.

I also want to recognize our volunteer Board of Directors. Their time, expertise, and commitment sustain FVCPAA's activities throughout the year, often alongside demanding professional and personal responsibilities. I'm grateful to serve with them.

If you are not yet a member, I invite you to join FVCPAA. Membership offers opportunities to build local professional relationships, exchange knowledge, and stay connected through our monthly breakfast meetings and other events. Whether you are early in your career or bring decades of experience, your participation strengthens our community.

We welcome your feedback and ideas for future events. Please introduce yourself, share your thoughts, and let us know how FVCPAA can continue to serve you.

Thank you for being part of today's conference. I look forward to a rewarding day of learning and conversation, and to connecting with you throughout the year.

Board of Directors 2026/27

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Schedule

7:30am - 8:00am	Registration & Networking
8:00am - 8:15am	Opening Remarks
8:20am - 9:20am	**Fundamentals of Business Valuation** *Randy Bassi* *Halo CPAs*
9:25am - 10:25am	**Updates on Grants & the Federal SR&ED Tax Credit Program** *Dr. Mirjam Mai* *Manning Elliott*
10:30am - 10:45am	**Coffee Break** *Sponsored by Agatha Cluff Inc.*
10:45am - 11:45am	**Tax Updates: New Dividend Rules & Family Trust Considerations** *Daman Bhathal, CPA & Logan Song, CPA* *Manning Elliott*
11:45am - 12:30pm	**LUNCH**
12:30pm - 1:30pm	**Practical Uses of AI** *Mike Willford, Sgt (Ret.), BA (Crim/Policing), Co-Founder* *VRFY Inc.*
1:30pm - 2:30pm	**Revenue Growth through Operational Efficiencies** *Jimmy Sandhu & Gagan Grewal* *Business Development Bank Canada*
2:30pm - 2:45pm	**Coffee Break** *Sponsored by Agatha Cluff Inc.*
2:45pm - 3:45pm	**CPA Program Updates** *Sharon Hummel* *CPABC*
3:45pm - 4:45pm	**Panel Discussion: What's Next for CPAs? Budget, Tax and the Road Ahead** **Featuring** *Erin Swint* *Tillie Parmar* ***Moderator:*** *Tejvir Pandher*
5:00pm - 6:00pm	**Reception**

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SESSION 1: BUSINESS VALUATIONS



Randy Bassi, Halo CPAs Inc.

Randy is a Chartered Professional Accountant (CPA) and Chartered Business Valuator (CBV), and a Partner at Halo CPAs Inc., based in Abbotsford, British Columbia. With over eight years of professional experience, Randy specializes in business valuations, financial reporting, corporate taxation, and advisory services, working primarily with privately held businesses across a wide range of industries.
Prior to establishing Halo CPAs Inc., Randy held a management role at a well-established regional accounting firm, where he led complex business valuation, accounting, and tax engagements involving both privately held and publicly traded companies. His valuation experience includes determining the fair market value of businesses and ownership interests for purposes such as shareholder transactions, corporate reorganizations, succession and estate planning, matrimonial matters, and other financial and strategic decisions.

Randy has extensive experience analyzing historical financial performance, assessing normalized earnings and cash flows, evaluating business risks, and applying various valuation methodologies to determine the fair market value of businesses. His combined accounting, taxation, and valuation background allows him to approach engagements from a comprehensive perspective, considering both the financial and operational factors that influence business value.
Randy is passionate about sharing his knowledge with fellow professionals and helping accountants better understand the practical considerations, methodologies, and complexities involved in business valuations.

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SESSION 2: UPDATES ON GRANTS & THE FEDERAL SR&ED TAX CREDIT PROGRAM



Dr Mirjam Mai
Manning Elliott

Mirjam joined Manning Elliott LLP as the SR&ED Manager in May 2024, specializing in SR&ED claims and grant advisory services. Fluent in German and English, she has worked on SR&ED claims across multiple industries for almost 5 years, including manufacturing, pharmaceuticals, bioinformatics, and AI. Her career includes positions as a Project Manager at ENTAX Services, R&D Scientist at Performance BioFilaments, and Product Development Coordinator at Solegear Bioplastics.

Mirjam holds a Ph.D. in Organic Chemistry and a Graduate Certificate in Science and Innovation Commercialization, and enjoys skiing and playing the clarinet in her free time.

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SESSION 3: 2026 TAX UPDATES & GENERAL PLANNING



Daman Bhathal, CPA
Manning Elliott

Daman is a Tax Partner in Manning Elliott's Abbotsford office, advising private companies and their owners across the Fraser Valley and Greater Vancouver area on Canadian tax matters. His practice focuses on personal and corporate tax planning, corporate reorganizations, estate and succession planning, and compliance.

Daman takes pride in helping business owners and families navigate complex tax matters. He is known for his collaborative, down-to-earth approach and ability to build long-term relationships grounded in trust. In addition to his client work, Daman is actively involved in the local community through board and professional organizations. Outside the office, Daman enjoys staying active, spending time with family and friends, and playing the occasional round of golf.



Logan Song, CPA
Manning Elliott

Logan advises owner-managed private enterprises on Canadian tax matters, with a focus on estate and succession planning, corporate reorganizations, post-mortem planning, and tax compliance. He has extensive experience within the agriculture sector, supporting agribusinesses through key transitions with practical, tailored advice that aligns with both business and family objectives.

Logan works closely with business owners across the full lifecycle of their operations, from growth and restructuring to succession and sale. Fluent in Korean, he builds strong, trusted relationships through clear communication and a collaborative approach. He is known for delivering practical, strategic guidance on complex tax matters, particularly for clients navigating multi-generational planning and evolving business structures.

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SESSION 4: PRACTICAL USE OF AI



Mike Willford, Co-Founder VRFY Inc.
Sgt (Ret.), BA (Crim/Policing)

Mike Willford brings more than 30 years of law enforcement experience, with expertise in criminal investigations and crisis negotiation. As Co-Founder of VRFY Inc., he develops secure communications intelligence solutions. His work on the Investigative Trust Framework supports trusted AI in regulated industries, including law enforcement, finance, and health care, through transparency, accountability, human oversight, and evidentiary integrity.

Mike is pursuing a Master of Arts in Counselling Psychology and trains crisis negotiators and frontline responders in de-escalation and intervention.

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SESSION 5: REVENUE GROWTH THROUGH OPERATIONAL EFFICIENCIES



Jimmy Sandhu
Business Development Bank of Canada

Jimmy Sandhu is an experienced commercial banking and business development professional with more than 20 years in the financial services industry. Over the course of his career, he has worked with entrepreneurs and business owners throughout British Columbia, helping them navigate financing, growth, acquisitions, succession planning, and other key stages in the life of their businesses.

Since joining BDC, Jimmy has focused on supporting mid-market entrepreneurs with financing and advisory solutions, including growth capital, equipment and real estate financing, business transitions, and strategic expansion. A key part of his work is collaborating with accountants, lawyers, and other professional advisors to develop practical financing solutions for their clients.

Jimmy holds a Master of Business Administration from The Robert Gordon University and a Bachelor of Business Administration from the British Columbia Institute of Technology.

Based in Abbotsford, Jimmy has built his career around helping entrepreneurs grow stronger businesses and values the important role accountants play as trusted advisors to business owners.



Gagan Grewal
Business Development Bank of Canada

Gagan Grewal is a Client Partner with BDC Advisory Services and an entrepreneur with more than 20 years of experience across finance, private equity, and business strategy.

His work focuses on helping Canadian businesses become more productive and competitive by improving how they operate and identifying where technology, AI, and automation can create meaningful value. At BDC, Gagan works directly with entrepreneurs on challenges ranging from strategy and operational efficiency to process optimization and digital transformation.

Gagan also brings first-hand entrepreneurial experience, having founded and scaled multiple businesses. That experience shapes a practical approach to technology: start with the business problem, improve the underlying process, and then determine where technology and automation can deliver results.

Gagan holds an Executive MBA from Simon Fraser University and has served on the Boards of Vancouver Opera, The Vancouver Club, and Kids Up Front Vancouver.

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SESSION 6: CPA PROGRAM UPDATES



Sharon Hummel

CPABC

Sharon Hummel is Associate Director, Employer Relations and Talent Development at Chartered Professional Accountants of British Columbia (CPABC). With more than 20 years of experience in employer relations, talent development, and higher education, she has built strategic partnerships and led programs that connect education, industry, and emerging talent. Sharon works closely with employers and partners across British Columbia to strengthen the CPA talent pipeline and support talent development.

She also serves as Vice-Chair of the Greater Vancouver Board of Trade's Leaders of Tomorrow Program, helping advance mentorship, leadership development, and student engagement opportunities.

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SESSION 7: WHAT'S NEXT FOR CPAS? BUDGET, TAX AND THE ROAD AHEAD

Meet the Panel



Erin Swint, CPA, CA
Swint & Associates



Tillie Parmar, Assistant Professor
Trinity Western University



Sharon Hummel
CPABC



Gagan Grewal
BDC



Moderator
Tejvir Pandher, CPA
Vice President, FVCPAA

Thank you to our Sponsors

Supporting learning. Connecting our Community.

The Fraser Valley Chartered Professional Accountants Association gratefully acknowledges the generous sponsors of our 2026 Annual Conference.

Your support helps us bring accounting professionals together for a day of learning, meaningful conversation, and connection. It allows us to offer professional development close to home while creating opportunities to share ideas and build relationships across the Fraser Valley. We appreciate your commitment to our association and the professional community we serve.

To all our sponsors, thank you for helping make this conference possible.

We encourage attendees to connect with our sponsors throughout the day and learn more about the businesses and services supporting our CPA community.

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YOUR COMMUNITY.
YOUR CONNECTION.

Connect with your local accounting community through the Fraser Valley Chartered Professional Accountants Association.

FVCPAA brings accounting professionals together through monthly breakfast meetings, professional development events, and our annual conference. We offer opportunities to exchange ideas, build professional relationships, and explore topics relevant to your work. Our scholarship program also supports the next generation of accounting professionals.

Whether you're beginning your career or bringing years of experience, we invite you to become a member and take part.

Visit our website to register for membership, explore upcoming events, and sign up for our newsletter.

We look forward to welcoming you!



LEARN MORE

www.fvcpaa.ca
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