Entrepreneurship Through Acquisition Certificate

Certificate Description

Canada is a country rife with small and medium-sized businesses (SMBs), many of which lack a formal succession plan. The BDC estimates a historic wave of $300 billion of business acquisitions are set to reshape Canada's economy.

This creates a significant market opportunity for entrepreneurial professionals, particularly CPAs who aspire to own and operate businesses. The Entrepreneurship Through Acquisition (ETA) program introduces CPAs and other professionals to the concept of Search Fund Investing, a growing model that enables individuals to acquire and manage businesses using investor capital. This approach not only addresses entrepreneurial aspirations but also provides a succession solution for retiring owners, ensuring continuity and growth for these businesses.

This intensive 3-day in-person bootcamp delivers a highly interactive, hands-on learning experience designed to immerse participants in the full ETA lifecycle: raising capital, sourcing deals, executing acquisitions, operating businesses, and planning exits. The program emphasizes practical application through case studies, simulations, and collaborative exercises.

By the end of this certificate, CPAs will be equipped with the knowledge, tools, and confidence to pursue entrepreneurship through acquisition by leveraging the search fund model.

19 PD Hours

ENTREPRENEURSHIP THROUGH ACQUISITION
CERTIFICATE PROGRAM
CPA ONTARIO

Topics Covered

Foundations of the Search Fund Model

This module provides a solid foundation in the search fund model and its role in Entrepreneurship Through Acquisition. It covers the history and evolution of the model, including performance trends, and explains what search funds are along with alternative structures that achieve similar outcomes. Participants will learn about common legal frameworks, the traits investors look for in successful searchers, and the SCUBA approach for deep analysis. The session concludes with practical strategies for raising search capital, preparing participants to take the first steps toward launching their acquisition journey.

Executing the Deal: From Sourcing to Closing Including Lunch

This module covers the essential steps in acquiring a business through ETA. Participants will learn effective sourcing methods, prepare EOIs and LOIs, and conduct thorough due diligence. The session explores financing options, legal structuring, and strategies for engaging investors, providing practical tools to move from initial outreach to a successful close.

Leading for Impact: The First 100 Days and Beyond

This module prepares participants to successfully transition from acquisition to leadership. It focuses on running a company post-close, including strategies for the critical first 100 days, building and executing a growth plan, and managing people effectively. Participants will also learn best practices for working with boards, fostering alignment, and driving long-term value creation.

Search Models and Investor Perspectives

This module explores the different types of search models within Entrepreneurship Through Acquisition, highlighting their structures, advantages, and outcomes. Participants will gain insight into how investors evaluate these models and what drives their decision-making, providing a clear understanding of the dynamics between searchers and capital providers.

The Exit: Process, Timing, and Real-World Outcomes

This module explores the complete exit process for ETA acquisitions, including planning, timing, and strategies to maximize value. Participants will learn how to structure successful exits and understand key considerations for stakeholders. The session features real-world examples of search fund exits in Canada, offering practical insights and lessons learned from actual transactions.

Comprehensive Case Study and Program Wrap-Up

In this capstone module, participants will apply everything learned throughout the program to a full case study. Working through a “soup-to-nuts” analysis of a potential acquisition, they will integrate concepts from sourcing and valuation to financing, legal structuring, and post-acquisition planning. This hands-on exercise reinforces practical skills and ensures participants leave with a clear roadmap for executing real-world ETA deals.

Who Will Benefit

This program is designed for professionals who want to become business owners through acquisition, particularly those exploring Entrepreneurship Through Acquisition (ETA) as a path to ownership. It will especially benefit:

- **Industry Professionals:** This program is designed for CPAs working in industry roles who are involved in evaluating, acquiring, financing, or integrating businesses. This includes professionals in corporate development, strategic finance, FP&A, operations, and senior finance leadership roles within private companies, growth-stage organizations, and acquisitive businesses. It is particularly relevant for those assessing acquisition opportunities, supporting ownership transitions, or preparing their organization for a sale, recapitalization, or external investment.

- **CPA Firms:** This program is designed for CPAs in public practice who advise clients on acquisitions, succession planning, and growth transactions, as well as professionals delivering Quality of Earnings, due diligence, valuations, M&A, and equity and debt advisory to small and mid-market sponsors and owners. It is particularly relevant for those in advisory, corporate finance, transaction services, valuation, tax, succession planning, and strategic finance roles, including practitioners supporting owner-managed businesses and private companies.

The program is ideal for firms seeking to expand their role beyond compliance and assurance into higher value transaction, deal advisory, and ownership transition support.

Schedule

Classes will be held in-person at the CPA Ontario Office at 69 Bloor St. E in Toronto.

Class 1 | September 30 , 2026
8:30 a.m. – 4:30 p.m. EDT

Class 2 | October 1, 2026
9:00 a.m. – 4:00 p.m. EDT

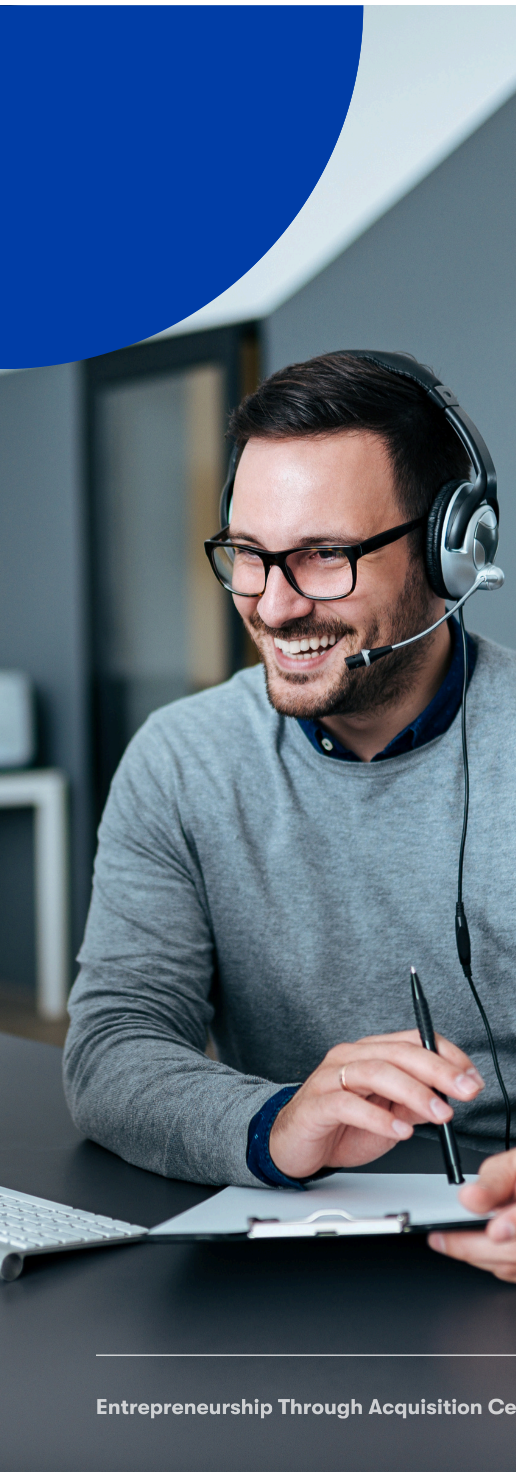
Class 3 | October 2, 2026
9:00 AM – 5:00 PM EDT

To earn your CPD hours and Digital Badge. you MUST attend all in-person to participate, there will not be an option to join this session virtually.

Key Takeaways

Upon completion of this bundle, you will:

- Explain the search fund model and its variations.
- Develop sourcing strategies and evaluate acquisition targets.
- Draft EOIs and LOIs and identify due diligence priorities.
- Structure financing and engage investors effectively
- Operate an acquired business and plan for exit.



Meet Your Instructors

Glen Silvestri is the Managing Partner of the Sage Capital Group of Companies and Chair of the Sage Capital Investment Committee. Mr. Silvestri's role as Managing Partner involves strategic planning, investment origination, portfolio management and monitoring, corporate governance, and overall management of the Investment Manager, along with his partner, Jonathan Piurko.

Brice Scheschuk, CPA is the Managing Partner of Globalive Capital (www.globalive.com), an advisor to WealthONE Bank and co-founder of ZeroStone AI. He was a co-founder and CFO of WIND Mobile as well as CEO of Globalive Communications. Brice has over thirty years' experience building and operating companies at Globalive, WIND Mobile, Leitch Technology and PricewaterhouseCoopers. He obtained his CPA designation at PricewaterhouseCoopers and B.Comm (Hon.) Finance from Dalhousie University. Brice served as a Maritime Surface Officer in the Royal Canadian Naval Reserve. Brice serves on numerous boards and advisory committees (public, private, and not-for-profit) and is a frequent speaker on scale-up entrepreneurship and innovation. He is a co-founder of MindFrame Connect (www.mindframeconnect.com), a not-for-profit focused on elevating the craft of mentorship, improving entrepreneurial resiliency, and alternative capital paths to venture capital. Brice is a supporter of Build Canada (www.buildcanada.com). His interests include Canada's innovation and start-up ecosystem, entrepreneurial finance, mentorship excellence, resiliency, financial literacy, political moderation/centrism, military veteran transition, fitness, travel, good food, good books, and great friends.

Have Questions? Speak to an Advisor.

To speak to one of our advisors, please fill out this form.