






» Course Catalogue



Finance

	Course Title	Modality	PD Hours	Member Price
	Compensation for Women: Earn What You Deserve (Audio)	Audio Learning	1 PD Hour	\$58
	Leading the Finance Function of the Future: Accelerator (Audio)	Audio Learning	1 PD Hour	\$58
	AI for Finance Bundle	On Demand Bundle	13 PD Hours	\$559
	Finance 20 Hour Build Your Bundle	On Demand Bundle	20 PD Hours	\$949
	Advanced Prompting for Financial Statement Analysis	On Demand	1.5 PD Hours	\$87
	Financial Storytelling: The Key in Growing Your Organization to the Next Level (AICPA)	On Demand	2 PD Hours	\$116
	Foundations of Machine Learning and Deep Learning for Finance	On Demand	2 PD Hours	\$116
	Introduction to AI in Finance	On Demand	1.5 PD Hours	\$87
	The 7 Secrets to Powerful Financial Presentations	On Demand	2.5 PD Hours	\$144
	The AI-Ready CPA: Leading Finance Through Change (AICPA)	On Demand	1.5 PD Hours	\$87
	Powerful Financial Analysis with AI and BI	Online Seminar	7.5 PD Hours	\$479

Corporate Finance

	Course Title	Modality	PD Hours	Member Price
NEW	Financial Statement Analysis Skills (Audio)	Audio Learning	1 PD Hour	\$58
	FP&A Career Pathway: Essential Skills and Knowledge (Audio)	Audio Learning	1 PD Hour	\$58
NEW	Going Private: Why Companies Are Exiting Capital Markets (Audio)	Audio Learning	1 PD Hour	\$58
	Mergers & Acquisitions: Building Process, Teams & Value (Audio)	Audio Learning	1 PD Hour	\$58
	Special Episode: The Implication of Trade Wars on Financial Markets (Audio)	Audio Learning	1 PD Hour	\$58
NEW	Succession Planning and Retirement for CPA Leaders (Audio)	Audio Learning	1 PD Hour	\$58
	Certificate in Corporate Finance (Instructor Led)	Certificate Program	21 PD Hours	\$2,195
	Certificate in Liquidity and Fund Management for SMEs (Instructor Led)	Certificate Program	10 PD Hours	\$1,099
	Certificate in Master Controllershship (Instructor Led)	Certificate Program	18 PD Hours	\$3,999


Corporate Finance cont.

Course Title	Modality	PD Hours	Member Price
Certificate in Mergers and Acquisitions (Instructor Led)	Certificate Program	12 PD Hours	\$1,499
 Entrepreneurship Through Acquisition Certificate Program (Instructor Led)	Certificate Program	19 PD Hours	\$2,999
Introduction to Venture Capital and Private Equity (Instructor Led)	Certificate Program	12 PD Hours	\$1,499
Certificate in Financial Markets and Innovation	On Demand Certificate	10 PD Hours	\$799
 Advanced Business Valuations: From Fundamentals to Purchase Price Allocations Bundle	On Demand Bundle	15 PD Hours	\$900
Cash Flow and Business Strategy Bundle	On Demand Bundle	15.5 PD Hours	\$667
Financial Resilience and Strategic Planning Bundle	On Demand Bundle	26 PD Hours	\$1,118
2025 Hot Topics for CFOs and Controllers	On Demand	4 PD Hours	\$232
3-Statement Modeling	On Demand	6.5 PD Hours	\$377

Corporate Finance cont.

Course Title	Modality	PD Hours	Member Price
AI-Powered Scenario Analysis	On Demand	2 PD Hours	\$116
Application of Cost of Capital	On Demand	5 PD Hours	\$290
Auditing and Balancing a 3-Statement Model	On Demand	2 PD Hours	\$116
Business Valuations: Advanced	On Demand	7.5 PD Hours	\$525
Business Valuations: Fundamentals	On Demand	7.5 PD Hours	\$525
Capital Budgeting	On Demand	2 PD Hours	\$116
Cash Flow Cycles and Analysis	On Demand	2.5 PD Hours	\$144
Corporate & Business Strategy	On Demand	7.5 PD Hours	\$435
Corporate Finance Fundamentals	On Demand	2.5 PD Hours	\$145
Debt Securities: Drivers of Bond Valuations	On Demand	2 PD Hours	\$116

Corporate Finance cont.

Course Title	Modality	PD Hours	Member Price
Debt Securities: Pricing, Valuations and Risk	On Demand	2 PD Hours	\$116
Developing a High Impact Financial Plan	On Demand	1.5 PD Hours	\$87
Developing Powerful Business Acumen	On Demand	1.5 PD Hours	\$87
 Economics for Financial Advisors	On Demand	1 PD Hour	\$58
Evaluating a Business Plan	On Demand	3 PD Hours	\$173
Finance Fundamentals	On Demand	6.25 PD Hours	\$361
Financial Analysis Fundamentals	On Demand	6.5 PD Hours	\$375
Financing Strategies	On Demand	7 PD Hours	\$490
How to Read Business Financial Information	On Demand	3.5 PD Hours	\$202
Impact of Tariffs on Businesses	On Demand	2 PD Hours	\$116


Corporate Finance cont.

Course Title	Modality	PD Hours	Member Price
Introduction to Business Valuation	On Demand	3 PD Hours	\$174
Investment Appraisals Not Using Discounted Cash Flows	On Demand	2 PD Hours	\$116
Investment Appraisals Using Discounted Cash Flow	On Demand	2 PD Hours	\$116
Loan Covenants Explained	On Demand	3 PD Hours	\$173
Loan Security	On Demand	2 PD Hours	\$116
Math for Corporate Finance	On Demand	2.5 PD Hours	\$144
Mergers and Acquisitions (M&A) Modeling	On Demand	8 PD Hours	\$462
Mining Financial Model and Valuation	On Demand	5 PD Hours	\$289
Monthly Cash Flow Modelling	On Demand	1 PD Hour	\$58
Practical Tips To Get Through A Cash Crisis (Update 2025)	On Demand	2.5 PD Hours	\$145

Corporate Finance cont.

Course Title	Modality	PD Hours	Member Price
Real Estate Financial Modeling	On Demand	6.5 PD Hours	\$375
Risk Metrics & Hedging	On Demand	2 PD Hours	\$116
Ten Practical Topics for Financial Leaders	On Demand	4 PD Hours	\$231
The New Controllershship: Keys to Boosting Financial Performance	On Demand	2 PD Hours	\$116
Understanding Financial Forwards & Futures	On Demand	2 PD Hours	\$116
Understanding Portfolio Theory	On Demand	2 PD Hours	\$116
Acquisitions to Grow a Business: Strategy, Structure, Integration and Due Diligence	Online Seminar	4 PD Hours	\$299
Corporate Finance Check-Up: Renovate Your Analytical Toolbox	Online Seminar	4 PD Hours	\$299
Corporate Treasury Management	Online Seminar	7 PD Hours	\$585
Mergers and Acquisitions: From Start to Finish	Online Seminar	7.5 PD Hours	\$479



Corporate Finance cont.

Course Title	Modality	PD Hours	Member Price
 Special Event: Entrepreneurship Through Acquisition: What CPAs Need to Know	Online Seminar	1 PD Hour	\$99


Personal Finance

Course Title	Modality	PD Hours	Member Price
Financial Planning: Life Insurance (Audio)	Audio Learning	1 PD Hour	\$58
Mindset-Driven Financial Management for CPAs (Audio)	Audio Learning	1 PD Hour	\$58
Retirement Planning Bundle	On Demand Bundle	6.5 PD Hours	\$280
A Six Point Plan for Financial Freedom (Update 2025)	On Demand	4 PD Hours	\$232
Cash Cows, Pigs and Jackpots: The Simplest Personal Finance Strategy Ever	On Demand	3 PD Hours	\$173
Financial Myths That Will Ruin Your Retirement Dreams	On Demand	4 PD Hours	\$231

Personal Finance cont.


Course Title	Modality	PD Hours	Member Price
How to Maximize Your Investment Returns	On Demand	4 PD Hours	\$232
 How to Retire in 10 Years or Less (Update 2025)	On Demand	4 PD Hours	\$232
Introduction to Personal Cash Flow Planning	On Demand	1 PD Hour	\$58
 Retirement on the Horizon: Tax, Investment, and Legacy	Online Seminar	4 PD Hours	\$299
Succession and Wealth Planning for Financial Professionals	Online Seminar	4 PD Hours	\$299

Wealth Management

Course Title	Modality	PD Hours	Member Price
 Advanced Investing Strategies: Lessons from a Canadian Financial Icon (Audio)	Audio Learning	1 PD Hour	\$58
Certificate in Wealth Management Advisory	On Demand Certificate	15 PD Hours	\$1,199
Alternative Investments for Wealth Advisors	On Demand	2 PD Hours	\$116

Note: Each course title links out to the relevant course page.

Wealth Management cont.

Course Title	Modality	PD Hours	Member Price
Fixed Income Fundamentals: Understanding Bonds	On Demand	3.5 PD Hours	\$202
 How to Maximize Your CPP and OAS Pensions (Update 2026)	On Demand	3 PD Hours	\$174
Commercial Real Estate Lease Fundamentals	Online Seminar	2 PD Hours	\$169

