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# Member Network Registration Notice Breakfast Briefing - GTA

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## Budgeting & Forecasting Best Practices

### Session Overview

Budgeting and forecasting is one of the critical responsibilities to effectively manage the operations of the business. The budgets and comparatives to actual financial results lead to many key decisions affecting compensation, headcount, strategy, and production. However, many organizations struggle to produce budgets in a timely manner while others have a difficult time explaining the variances between the actual results and budgets.

To address these issues, this session will cover the best practices in budgeting / forecasting. First, there will be an open discussion on the common problems that many organizations face related to the budgeting / forecasting process. Next, a variety of budgeting methods will be covered followed by offering best practices to help improve your current budgeting / forecasting process.

### Learning Objectives

This session will provide attendees with:

- a different perspective on how others approach budgeting
- multiple budgeting methodologies
- best practices for budgeting / forecasting

### Who Should Attend

This session is geared towards CMAs and all staff within the organization who are closely involved with budgeting, forecasting, financial analysis and performance management. Anyone who wishes to improve on any of these areas should attend the session.

### About the Speakers

#### **Victor Leung - President, VL Consulting Professionals**

Victor Leung has worked for wide variety of companies, including AEGON Canada and Healthcare of Ontario Pension Plan (HOOPP), dealing with system implementation, data management and process improvements. His knowledge and consulting experience is complemented with multiple professional designations including Certified Management Accountant (CMA), Certified Public Accountant (CPA), and Project Management Professional (PMP).

#### **Sam Mendelsohn - Channel Technical Manager, PROPHIX Software**

Sam Mendelsohn has done over 50 reporting, budgeting and planning implementations across a variety of industries, including manufacturing, services, hi-tech, pharmaceutical, and educational institutions. Prior to working at PROPHIX, Sam worked as a private consultant in the retail industry as well as in the transportation and logistics industry. Sam currently holds a Certified Management Accountant (CMA) designation.

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## GTA Dates & Locations

### TORONTO – Tuesday, October 19<sup>th</sup>, 2010

CMA Ontario – Microsoft Dynamics Business Lounge  
70 University Avenue, Ground Floor  
Toronto, ON M5J 2M4  
416-977-7741

### MISSISSAUGA – Wednesday, October 20<sup>th</sup>, 2010

Hampton Inn by Hilton – Clarkson Room  
2085 North Sheridan Way  
Mississauga, ON L5K 2T2  
905-823-8600

### MARKHAM – Thursday, October 21<sup>st</sup>, 2010

Crystal Fountain Banquet Hall – Upper Level  
60 McDowell Gate  
Markham, ON L6G 1B5  
905-513-1900

#### Time:

7:30 a.m. to 8:00 a.m. – Registration/Networking/Continental Breakfast  
8:00 a.m. to 9:00 a.m. – Presentation  
9:00 a.m. to 9:15 a.m. – Q&A

#### Cost:

\$35.00 plus GST – Members  
\$40.00 plus GST – Non-Members

#### REGISTRATION:

To register online please visit the CMA Ontario Member Portal at <http://members.cma-ontario.org>.

To register by email or fax please complete the form on the following page and send to Leena Rosenberg at 416-977-1365 (fax) or [rosenberg@cmaontario.org](mailto:rosenberg@cmaontario.org)

Guests (non-members) may register by email or fax by completing the form on the following page and sending to Leena Rosenberg at 416-977-1365 (fax) or [rosenberg@cmaontario.org](mailto:rosenberg@cmaontario.org)

#### CPLD:

2 Credits

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**REGISTRATION FORM**

Please fax or email your registration form to Leena Rosenberg, Tel : ( 416) 204-3140 or (800) 387-2991 ext 140,  
Fax (416) 977-1365, [rosenberg@cmaontario.org](mailto:rosenberg@cmaontario.org)

**Budgeting & Forecasting Best Practices  
GTA Series – Toronto – Mississauga – Markham**

Name: \_\_\_\_\_ I am a Member:  I am a guest (non-member):

Member #: \_\_\_\_\_ Tel: \_\_\_\_\_

Credit Card (Visa/MasterCard): \_\_\_\_\_ Expiry Date: \_\_\_\_\_

Signature: \_\_\_\_\_ Dietary Restrictions: \_\_\_\_\_

**No refunds for cancellations after October 16, 2010. Substitutions accepted at no charge.**

For a complete listing of District and Member Network events please visit [www.cmaontario.org/events](http://www.cmaontario.org/events).

Visit [www.myCMAcommunity.com](http://www.myCMAcommunity.com) to discuss the latest business trends and share insights and best practices in management accounting with fellow Certified Members and Candidates.

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