
Member Network Registration Notice Breakfast Briefing - Ottawa



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.

Date:

Thursday, October 28th, 2010

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Location:

CMA Ontario – Professional Development Institute
110 O'Connor, Suite #2
Ottawa, ON K1P 5M8
613-567-5207

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 below and send to Leena Rosenberg at 416-977-1365 (fax) or rosenberg@cmaontario.org

Guests (non-members) may register by email or fax by completing the form below and sending to Leena Rosenberg at 416-977-1365 (fax) or rosenberg@cmaontario.org

CPLD:

2 Credits

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

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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 21, 2010. Substitutions accepted at no charge.

For a complete listing of District and Member Network events please visit www.cmaontario.org/events.

Visit 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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