



2017 CPA Manitoba

*Member Recognition  
Spotlight*



**CPA**

CHARTERED  
PROFESSIONAL  
ACCOUNTANTS  
MANITOBA

# Congratulations!



The second annual CPA Manitoba Member Recognition Gala took place on May 11, 2017 at the Canadian Museum for Human Rights. Over 250 guests were in attendance to celebrate the achievements of our award recipients.

It is important to promote the profession and give back to our communities. The recipients of the CPA Manitoba Member Recognition Program are dedicated ambassadors of the profession and have done excellent and important work in their companies and organizations.

They are the ones who have always done more than is required of them. They take on additional challenges and donate their skills and time to causes and programs that benefit others. When the profession asks for guidance and leadership, they answer the call - often repeatedly.

On behalf of the profession, we thank each and every member who takes time to mentor an employee, serve on a board, coach a team or volunteer for a worthy cause. Each contribution of your time, voice and expertise makes all the difference in the world.

The Member Recognition Program exists so that we can put the exceptional contributions of our members in the spotlight and showcase the great work we do as CPAs. I encourage you to nominate a fellow member who meets the award criteria. The time dedicated to preparing a nomination is what makes this all possible.

A handwritten signature in black ink that reads "David Sachvie".

David Sachvie, FCPA, FCA  
Chair, CPA Manitoba Board

# Lifetime Achievement Award

The CPA Manitoba Lifetime Achievement Award is bestowed to a CPA who has brought honour to the profession by distinction in service to the profession, career or community.

# CPA Manitoba Lifetime Achievement Award

## Ron Stoesz, FCPA, FCMA

The 2017 recipient of the CPA Manitoba Lifetime Achievement Award, Ron Stoesz, FCPA, FCMA, is now retired and smiles as he reflects on his 40-year career.

“I’ve had a lot of great jobs, but the most rewarding job I ever had was Chief Executive Officer at CMA Manitoba. I had the privilege of helping to create careers for individuals,” he explains. “We really made a difference during my time there.”

Stoesz smiles even brighter as he remembers one moment in particular.

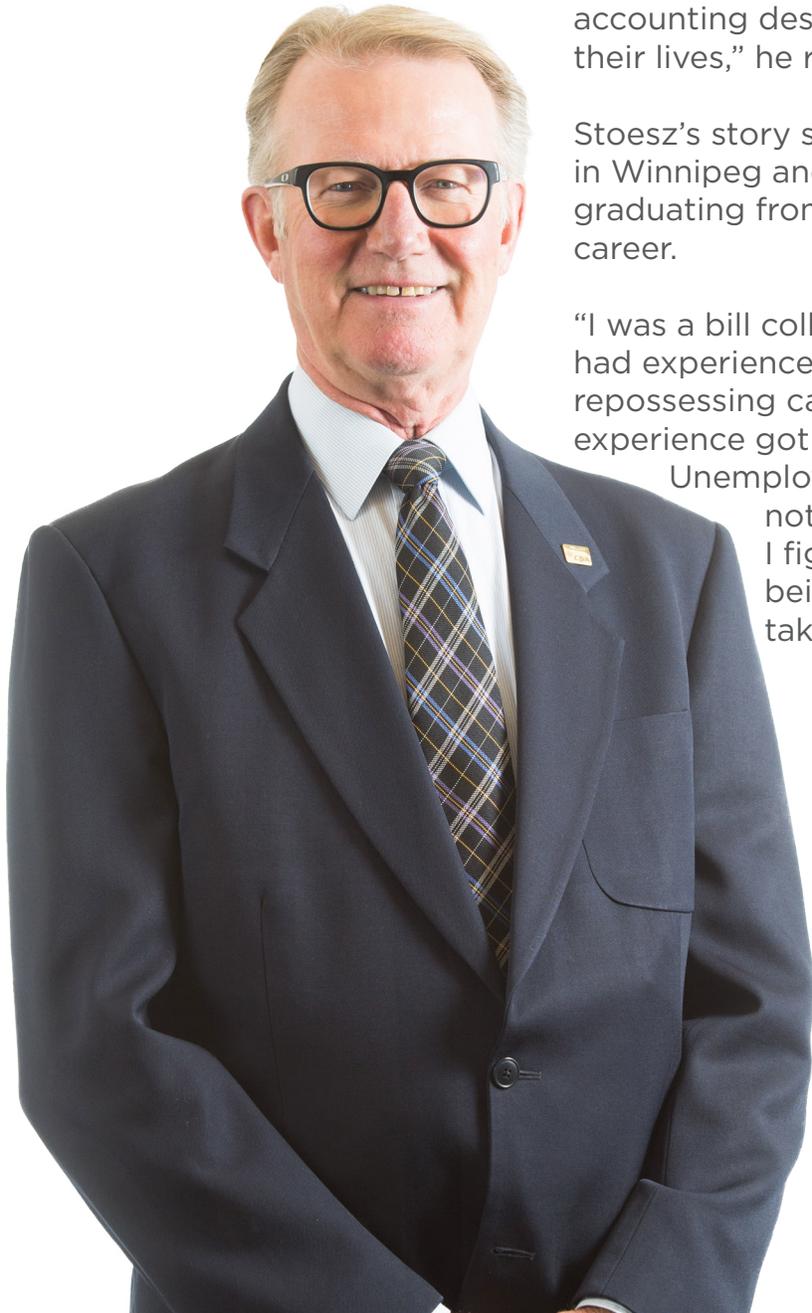
“I was attending a CMA convocation ceremony and one of the graduates, who I had recruited into the program came up to me with his wife and two children. They were all so thankful. He had just graduated and his career had taken off in part because of his accounting designation. I was able to make a difference in their lives,” he recalls before adding, “there were others too.”

Stoesz’s story starts from humble beginnings. He grew up in Winnipeg and attended Windsor Park High School. After graduating from Red River College in 1973 he began his career.

“I was a bill collector for a finance company,” he chuckles. “I had experience collecting overdue accounts and repossessing cars, furniture and all kinds of things. That experience got me a job as a collector with the Unemployment Insurance Commission. One day I noticed a posting for a financial officer position. I figured, why not? I applied and ended up being offered the position on the condition I take an accounting designation.”

That was his launching point. Stoesz went on to complete his designation and worked for the government—something he would do for the next 34 years in various roles.

During the ‘80s and ‘90s much improvement was being made in the area of financial systems. Government departments were building in-house programs, while spreadsheet and



# CPA Manitoba Lifetime Achievement Award

databases were becoming the applications of choice for accountants.

In the late '90s, the RCMP had overspent their budget and knowing that an overhaul was needed, they implemented a number of changes. One such change was the hiring of four senior financial officers from across Canada to strengthen their financial processes.

“I was one of them. I started off as the Director of Financial Management and Accounting Operations for Manitoba, Saskatchewan, Alberta, Northwest Territories and Nunavut,” he explains.

Stoesz led a talented team that developed new financial processes and applications for the RCMP. The process took years. They used cutting-edge thinking and programming, and many of the processes are still in place today.

Stoesz's innovative work was not the only thing he was becoming known for. It was around this time that his fondness for clichés was established.

“It's true, I live by a lot of clichés,” he says with a laugh. “I have probably said the same things a hundred times a month, to the point where my staff thought I was crazy.” It wasn't without good reason, however. His strategy of repetition would prove highly effective.

“When I became a Director at the RCMP, I broke down the work into what was really important: planning, budgeting, reporting, forecasting, advice and guidance, and measuring performance. I'd say those things over and over to everyone, all the time.” It helped build Stoesz's reputation as someone who gets things accomplished.

“Government has a reputation for not getting a lot of things done, but during my time there I had quite the opposite experience. On the great teams I worked with, we were always successful in reaching our goals.”

In addition to his career, giving back was a priority for Stoesz.

“Volunteering and contributing to the accounting profession was one of my biggest passions. It started back in 1988 when I was asked to participate on a board. I still had young children and time was tight, but once I got started I absolutely loved it.”

And get started he did. He tirelessly volunteered his time helping various accounting boards and committees reach their goals and mandates in education, event planning and member services. Stoesz was the provincial President for CMA Manitoba in the mid-1990s before joining the CMA Canada board and eventually served as national Chair in 2006 and 2007.

“Looking back, I see it this way: the career was great, but the volunteer work for CMA was my passion. It was like another career where I really had an impact. I loved it.”

# CPA Manitoba Lifetime Achievement Award

So when he was asked to lead CMA Manitoba as its Chief Executive Officer, he leaped at the chance. There was plenty of work to be done.

“We had some very fascinating and talented board members who asked great questions and pushed us to deliver results. We would adapt, innovate and champion new ideas as a close-knit team that accomplished a great deal.”

Along with helping lead the profession through the merger, Stoesz and his team grew membership substantially, improved member satisfaction and created new partnerships with post-secondary institutions and the business community.

Stoesz’s career has included reconstruction of Canadian governmental department financials, looking after all financial assets for the RCMP and donating countless hours to the accounting profession. So, how does someone like that react when he finds out that he is receiving the CPA Manitoba Lifetime Achievement Award?

“I was totally taken aback when I got the call informing me of the honour. I’m so humbled and thankful. There are so many people who are deserving and I have had the pleasure of working with many of them. Throughout my career the people I’ve worked with have really been the reason for any success I’ve had,” Stoesz explains, still smiling before adding, “And that’s not a cliché.”

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# Fellow CPA (FCPA)

The title of Fellow CPA formally recognizes those members who have rendered exceptional services to the profession and whose achievements in their careers or the community have earned them distinction and brought honour to the profession.

# Fellow CPA (FCPA)

## Cheryl Barker, FCPA, FCA

Cheryl began her career as a member on an audit team at what is now KPMG. Twenty-one years later she was president and CEO of MTS Communications Inc. and named one of Canada's top-100 most powerful women by WXN (Women's Executive Network).

Cheryl worked at MTS for over 19 years. First as Treasurer and then Executive VP Finance & CFO, before ultimately becoming President and CEO in 2002. Along the way she worked on and led many incredible projects.

She was integral to the process which led to the initial public offering of MTS when it transitioned from a provincial crown corporation in the late 1990s.

Under her leadership, MTS pursued and secured the rights to name True North Sports + Entertainment's MTS Centre. The deal equipped the facility with the latest possible technology and continues to generate massive brand recognition for the company.

Cheryl also worked with partners and colleagues to create a multi-faceted program that enables equitable career advancement for women.

In addition to her contributions in the public and private sectors, she also lent her skills to many volunteer and charitable organizations.

In 2006, she was appointed to the PSP Investment board where she served as Chair. During her tenure, the board developed a Risk Appetite Statement that defined the board's appetite, attitude and tolerance for risk and became a signatory of the United Nations-supported Principles for Responsible Investment.

Her accomplishments as Chair of the board at Manitoba Film & Music includes helping to bring the 2005 Juno Awards to Winnipeg and an increase in the number of major motion pictures filmed in Winnipeg. This led to an appointment on the Canadian Media Fund Board where she currently serves.



# Fellow CPA (FCPA)

## John Cole, FCPA, FCA

John became the Chief Operating Officer at Palliser Furniture Holdings Ltd. in 2015. Reporting to the President and Chairman of the Board, he works with company shareholders and management to maximize value for the companies' furniture manufacturing, retail and real estate assets.

John began his professional career at EY. After spending eight years in public practice where he reached the level of Senior Manager, he joined Palliser Furniture in 1997 rising to the level of Senior Director.

Over his first eight years with Palliser, John supported the development of strategic, operational and financial plans for various companies in the group to support their global operations.

To broaden his experience, he then held senior finance roles as CFO of the Arnold Group of companies as well as Corporate Controller with IKON Office Solutions, an NYSE listed company, through its acquisition by Ricoh.

In 2009, John assumed the role of Senior Vice-President and CFO at Loewen Windows and Doors. Over his six-year tenure he led Canadian and US finance, HR, customer service and IT functions during a turbulent time for the global economy. He also played a key role in facilitating the sale of the company, its refinancing and ultimately the repurchase of the company, a process which was completed in 2013.

In addition to John's outstanding work in the private sector, he has consistently given back to the community. He serves as Past President for the board of Financial Executives International (Winnipeg) and Treasurer for the Duke of Edinburgh Awards (Winnipeg). In 2015, John acted as a Co-Chair for FEI Canada's Sponsorship Committee for the National Conference and attained the best results in FEI's history to date.

John also volunteers regularly for various other non-profit organizations.



# Fellow CPA (FCPA)

## Susan Deleau, FCPA, FCA

Susan is the Assistant Vice-President, Global Taxation at Great-West Lifeco Inc., where she provides oversight of the company's tax accounting for operations spanning the world. Beginning her career with Deloitte, she received her accounting designation in 1993 and has excelled in public practice, education and industry.

Early in her career, Susan became involved with the ICAM education program and coached many of Manitoba's accounting candidates to success in the profession's final examination.

While taking a sabbatical from Deloitte to spend more time with her growing family, she transitioned to the role of online and face-to-face facilitator at the CA School of Business. During this time, she provided leadership, guidance and inspiration to countless students. She went on to be awarded the first Kouri Berezan Heinrichs Facilitator Award given to top facilitators at the School.

Susan was promoted to Director of Learning and was responsible for curriculum development, delivery, facilitation and evaluation. In this position, she successfully effected significant change and transformation in the design and delivery of the qualification program for western Canadian accounting students.

Throughout her career, Susan has been a mentor to CA and CPA students and candidates and her involvement with the WRHA, St. Paul's High School, Heart and Stroke Foundation, CPA Canada Financial Literacy Program and the Canadian Life and Health Insurance Association working groups, exemplifies what it means to give back to the profession and the community.

She was also part of a team that provided hockey skill development to children. Susan helped raise over \$150,000 for a local community centre and was named the community centre's volunteer of the year.

She continues to contribute to the profession as a current member of the CPA Canada Board of Evaluators.



# Fellow CPA (FCPA)

## Susan Hagemeister, FCPA, FCA

Susan is the Director of Finance at The Winnipeg Foundation. She leads the financial and administrative aspects of the Foundation's work. Much of her time is dedicated to the development of relationship strategies for charitable organizations that have agency endowment funds.

During her time at the Foundation, the endowment program has expanded from 70 to 185 agencies, creating in excess of \$100 million in assets.

Susan has also volunteered countless hours to philanthropic causes. Her commitment to the CPA Manitoba Foundation has been unwavering since she first joined the CA Manitoba Foundation as a board member in 2010.

Susan played an instrumental role in the amalgamation of the foundations and transfer of trust for the three legacy bodies. Her extensive experience was integral to creating the by-laws which govern the CPA Manitoba Foundation today.

As the first board Chair of the CPA Manitoba Foundation, she helped establish the Foundation's strategic plan and set the stage for the Foundation's future success. It was an intensive process that required many hours of hard work and dedication.

Susan's dedication to charitable causes extends to a number of other organizations. She has contributed guidance and expertise in a variety of leadership roles with the YMCA-YWCA of Winnipeg, the Estate Planning Council of Winnipeg, the Canadian Association of Gift Planners and the Children's Hospital Foundation of Winnipeg.



# Fellow CPA (FCPA)

## Daniel Lussier, FCPA, FCMA

Dan was named Chief Executive Officer at Canad Inns in 2016. Before that, he served as the company's Chief Financial Officer for 15 years. Over that time, he played a significant role in property development projects valued as large as \$50 million as well as the development of new hotels, restaurants, shopping centres and the complete restoration of the locally renowned Metropolitan Theatre.

Dan played a key role in negotiating many important leases and contracts that helped expand the company. Dan's versatile role also saw him provide leadership and direction to other Canad Inns departments including security and safety, purchasing, information technology and sales.

His contributions, among others, were key factors in Canad Inns being named one of Canada's Best Managed Companies every year since 1997, one of Manitoba's Top Employers (2010-2013) and Canada's Top Employers for Young People (2010-2011).

In addition to his successes at Canada Inns, Dan has tirelessly supported community initiatives. He has been particularly active in supporting Manitoba's francophone community by serving on many boards and committees.

Dan is the Chair of the St. Boniface Hospital Auxiliary and sits on the boards of Université de Saint-Boniface, Travel Manitoba and Actionmarguerite.

He recently completed a four-year role as Treasurer of La Liberté, the only French provincial weekly newspaper in Manitoba, where he was relied on to carry the organization through the financial risk of putting on a large 100th anniversary celebration. As Director of Finance and Treasurer, he also helped guide the annual Festival du Voyageur winter celebration of French Canadian culture through lean years.



# Fellow CPA (FCPA)

## Priti Mehta-Shah, FCPA, FCA

Priti is the Managing Partner of 49-97 Capital Partners, a firm she co-founded in 2012 which now assists clients in Winnipeg and around the world. Prior to her time at 49-97, Priti was a partner at BDO Canada and in charge of Corporate Finance for Western Canada.

She has over 25 years of corporate finance experience which includes assisting clients in mergers and acquisitions, both sell-side and buy-side, business valuations and private equity.

Priti is a passionate advocate for the Winnipeg business community and serves several not-for-profit enterprises. She has been sought after by media, including The Globe and Mail and the Winnipeg Free Press, for her insight and reaction to financial news and related topics.

In 2015, she was appointed Chair of The Winnipeg Chamber of Commerce where she helped form the organization's first gender-balanced board in its 144-year history and advocate for venture capital in Manitoba.

Priti also lends her expertise as a Chair to Entrepreneurs' Organization (EO) Winnipeg, a global peer-to-peer network that enables more than 12,000 influential business owners to learn and prosper. She has helped EO Winnipeg grow its female membership to double that of the world-wide average.

She is a well-known conference speaker and instructor. She most recently spoke at the Conference Board of Canada's Economic Outlook in November 2016. Priti has spoken at the Global Women Entrepreneurs Conference in Mexico City, Micro Credit in India and Creating Wealth for Women in Cairo.

Alongside her work as an entrepreneur and champion for Winnipeg's business community, she was the Chair of Finance at the Children's Hospital Foundation board where she's volunteered since 2011.



# Fellow CPA (FCPA)

## Janet Morrill, FCPA, FCA, FCGA

Janet is an Associate Professor in the Accounting and Finance Department at the University of Manitoba's Asper School of Business. Since 1997, Janet has taught and inspired future business and accounting leaders as well as made significant contributions to the accounting profession.

Included among her numerous teaching and academia-based awards are Professor of the Year, University of Manitoba/UMFA Merit Award for Teaching and the MBAA International McGraw-Hill/Irwin Distinguished Paper Award.

Janet is sought-after to present at conferences around the world and has spoken at over 40 conferences such as, the Canadian Academic Accounting Association Annual Meeting, the European Accounting Association Forum and the Hong Kong Society of Accountants Annual Conference.

She has received eight faculty awards recognizing her teaching work and her students consistently rate her as one of the top professors at the University of Manitoba as part of an anonymous student evaluation of professors. She continues to be referenced in accounting-focused academic and professional journals.

In addition to her work at the Asper School of Business, she is active in the accounting profession. Janet was a board member for the CA School of Business for almost ten years, part of the CGA Exam Oversight Committee and part of eight other CGA, CA and CPA task forces, boards and committees. She also assisted CPA Canada as a member of the Competency Framework Task Force during the merger.

Janet has also been active in the community, volunteering her time as a trustee for Christ the King Parish and as Vice-President of the University Faculty Association.



# Fellow CPA (FCPA)

## Tanis Olafson, FCPA, FCGA

Tanis began her career shortly after she completed high school, taking a job as an administrative assistant at a public accounting firm. Loving the variety and fast-paced environment of public accounting, she purchased the firm and became a sole practitioner in 2000.

Along the way she obtained her accounting designation, worked extensively in First Nations auditing and consulting and grew the firm. In 2007, she partnered with Mark Jones, FCPA, FCGA, to form the firm that it is today – Olafson & Jones, Chartered Professional Accountants.

As a lifelong public accountant, Tanis has provided accounting, tax and advisory services to a diverse range of clients including corporate, personal and not-for-profit.

In 2012, Tanis was hired by CGA Manitoba to conduct practice inspections of her peers. The inspections ensured that all firms were in compliance with accounting and auditing standards.

Throughout her career, Tanis has also been actively involved in the profession. She has served as a mentor to new practitioners and delivered seminars for CGA Manitoba on accounting and auditing standards.

She served in several ways for CGA Manitoba, including the CGA Manitoba Board of Governors and the CGA Canada National Professional Standards Committee. Tanis is currently a member of the Practice Inspection Committee for CPA Manitoba.

Additionally, she has been an active volunteer outside of the profession working with the non-profit sector. Tanis has served as Treasurer of the Hearthstone Community Group, an organization that assists adults with mental disabilities and is currently on the board for the McConnell School of Dance.



# Fellow CPA (FCPA)

## Daniel Torbiak, FCPA, FCA

Dan is an Executive-in-Residence at the University of Manitoba's Asper School of Business where he helps develop relationships between the School and the Manitoba business community. At the Asper School, he also lectures on taxation, and moderates an executive-education program for managers who want to improve their accounting and financial skills.

Dan is also a sessional taxation lecturer at the University of Manitoba's Robson Hall Faculty of Law and serves the Max Rady College of Medicine as its first financial counselor.

He adjudicates tax appeals as the Chief Tax Appeals Commissioner for the Province of Manitoba. Previously, he enjoyed a 30-year career as an accountant and tax advisor, most recently as a tax partner at PricewaterhouseCoopers.

Dan has been dedicated to the profession through his participation on the CA Manitoba Foundation board, as well as his current participation on the CPA Manitoba Foundation board.

He serves as Treasurer for the board of the Immigrant Centre Manitoba Inc., a not-for-profit that helps newcomers succeed through personalized settlement plans and community partnerships. He has also been an important supporter of the United Way of Winnipeg as an Agency Liaison Volunteer and Vice-Chair of the Income Impact Council. He has written and presented financial-literacy training to help United Way volunteers assess the financial health of agency partners.



# Early Achievement Award

The CPA Manitoba Early Achievement Award is bestowed to members who demonstrate an ongoing commitment and excellence in their professional, community or other volunteer involvement and career achievement within the first ten years of membership.

# Early Achievement Award

## Hipolito Alibin Jr., CPA, CGA

Hipolito was admitted to membership in 2010 and has been the Co-Founder and CFO of Trivenity Corporation since 2015. Hipolito leads the treasury and accounting functions at Trivenity and heads up the company's corporate finance division.

Before taking on his role at Trivenity, he was Chief Financial Officer of Blueprint Global Partners, a self-employed consultant and Manager of Finance and Administration at the Government of Manitoba.

Hipolito is an active and passionate advocate for small and medium-sized businesses and actively collaborates with like-minded community leaders who are dedicated to achieving economic growth in Winnipeg.

Hipolito is well known in the community through his roles as President of the Manitoba Filipino Business Council Inc., Director with Economic Development Winnipeg and leadership council member with The Winnipeg Chamber of Commerce.



# Early Achievement Award

## Jonathan Murray, CPA, CA

Jonathan was admitted to membership in 2009 and is the Chief Financial Officer of the Genesis Hospitality Partnership which is headquartered in Brandon, Manitoba. Genesis Hospitality owns ten hotels across Manitoba and Ontario.

Since starting with Genesis Hospitality in early 2016, Jonathan has been evaluating potential acquisitions and franchise opportunities with the primary goal of growing the company.

Previously, Jonathan worked as a Controller at T.L. Penner Construction, Tax Manager for BDO Canada and as a Senior Accountant for KPMG.

He has also been a champion for the community of Brandon where he has served on the Provincial Advisory Board for the Heart and Stroke Foundation and Brandon Crime Stoppers. He is currently a member of the Prairie Mountain Health Region board.



# Early Achievement Award

## Mandeep Rai, CPA, CA

Mandeep was admitted to membership in 2009 and is currently the Chief Financial Officer at Sprott Mining Inc., a growing mid-tier North American gold producer headquartered in Toronto.

Mandeep began his career at Deloitte LLP in the Audit and Assurance practice where he provided services to many of the province's publicly listed companies. In December of 2010, he joined San Gold Corporation, a gold production company listed on the Toronto Stock Exchange, as Corporate Controller. He was the project leader during the company's transition to International Financial Reporting Standards. In March of 2014, he was promoted to Chief Financial Officer and led the company through significant restructuring initiatives.

In the community, Mandeep volunteers at Macdonald Youth Services as a member of the Board of Directors and Infrastructure Committee and with the Kidney Foundation of Canada - Manitoba Branch as a member of the Finance Committee. Within the profession, Mandeep contributes as a member of the CPA Manitoba High School Scholarship Selection Committee and is currently involved with Financial Executives International Canada as a member of the Winnipeg Chapter's Board.



# Community Service Award

The CPA Manitoba Community Service Award is bestowed to members who have made outstanding contributions to community service or volunteer organizations.

# Community Service Award

## Allyson Watts, CPA, CMA

Allyson strives to make the community a better place through her lifelong commitment to volunteerism. She joined the Immigrant and Refugee Community Organization of Manitoba Inc. (IRCOM) in 2007 when the organization was struggling through years of under-funding. She began working one day per week as the organization's accountant. From there she went on to volunteer many hours helping lead the organization through enormous growth. Today, IRCOM supports over 1600 new Canadians and features a support team of more than 60 staff.

In addition, Allyson has been active with Amnesty International since she became a member at age 15. In 2001, she became Treasurer for Amnesty International Winnipeg (Group 19). A position she continues to serve in today, 16 years later.

Allyson's passion for the community does not stop there. She lends her accounting expertise to Friends of the Winnipeg Public Library, Manitoba Society of Artists, Program for Adolescent Parents and Infant Development, Interchurch Council on Hydropower, and all told, has made contributions to over 15 charitable organizations.



# Community Service Award

## Jonathan Webber, CPA, CGA

Jonathan has made giving back to the community a priority. Most recently he served as Chair of the board at Bravestone Centre Inc., a non-profit charitable organization that provides women and their children affected by domestic violence secure and safe housing as well as support programs and counselling. Over the past four years he has also taken a lead role by heading up both the fundraising and human resource committee at Bravestone.

As a sports enthusiast, Jonathan is a current Governor at Niakwa Country Club, a previous Director of Finance for the St. Vital Mustangs Football Club, a volunteer at the Dakota Community Centre and has spent the last two decades coaching amateur hockey.



# Meritorious Service Award

The CPA Manitoba Meritorious Service Award is bestowed to members, students, candidates or others who have served CPA Manitoba in a meritorious fashion.

# Meritorious Service Award



**Ian Craven, CPA, CMA**

Ian was a member of the first CPA Western School of Business board. Prior to Ian's involvement with the School, he was a member of the CMA Manitoba 2006-2011 board. He also served on the CMA Manitoba Management Review Committee and Nominating Committee.



**Richard Potter, FCPA, FCA**

Rick was a member of the CA School of Business and CPA Western School of Business boards. Prior to Rick's involvement with the Schools, he participated on many national committees related to professional education and was a member and President of the CA Manitoba board.



**Douglas Tkach, FCPA, FCA**

Doug was a member of the Canadian Institute of Chartered Accountants (CICA) and CPA Canada boards. He was also a member of the CPA Canada Audit Committee. Prior to his involvement at the national level, Doug was a member and President of the CA Manitoba board.



**Byron Williams, LLB**

Byron is a lawyer and has served as a Public Representative on the CGA Manitoba, CPA Manitoba Joint Venture and CPA Manitoba boards. He was a strong contributor during the merger of the accounting profession in Manitoba by offering relevant legal insights.

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