Insurance Institute British Columbia

Insurance Institute of BC

Seminar

Your premier source for professional development.

Documentation – What it Takes to Investigate Income

Tuesday, May 15, 2018 | 8:45am – 12pm PST | Insurance Institute of BC

CLASSROOM | BUILDING | TECHNICAL

Whether it's loss of income for an individual or profit/loss calculations for a business, determining income is often essential when assessing claim. The challenge is in knowing what documentation, and more specifically, what information on those documents, will provide you with the insight you require. Along with highlighting what data to focus on, our expert presenters will reveal how you can collect the information you need from a variety of alternate sources when you don't have everything at your fingertips.

SEMINAR OBJECTIVES

- Differentiate between types of personal income: employment vs. self-employment
- Recognize income related documents for different types of businesses: corporation vs. sole proprietorship/partnership
- Identify information required from various documents to determine income:
    - Income statements and balance sheets
    - Income tax returns and Notice of Assessment
    - Original source documents (ie. invoices, timesheets)
- Understand why certain information is significant in determining revenue and expenses
- Determine variable and fixed costs and their impact
- Spot red flags in provided and withheld documentation

SEMINAR PRESENTERS

From **Williams & Partners Investigative Accountants Inc.**

The Williams & Partners team consists of professionals with experience in all facets of investigative and forensic accounting. Many of their clients are in the insurance industry including insurance companies, independent insurance adjusters, law firms, corporations, municipalities, and business owners.

Damian Alksnis, CPA, CMA, CFF – Forensic Accountant
Bichtar Mahal, BBA, CPA, CA – Forensic Accountant
Stephen Graff, CPA, CA•IFA, CFF, CFE – Forensic Accountant

DATE & TIME
Tuesday, May 15, 2018
8:45am – 12pm PST

LOCATION
Insurance Institute of BC
#1110 – 800 W. Pender Street
Vancouver, V6C 2V6

PRICE *(includes coffee service, light breakfast snacks & GST)*
$125 IIBC Members
$205 Non Members (Includes IIBC Membership expiring May 31st, 2019)

CE CREDIT
3 Technical

REGISTRATION FORM

Documentation – What it Takes to Investigate Income

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Registration Deadline: Friday, May 11

~ Please complete a separate form per attendee ~

OPTION #1: Register Online & Payment by Credit Card

Visit www.insuranceinstitute.ca/britishcolumbia. Payment accepted by VISA, MasterCard or AMEX.

OPTION #2: Register Manually with this Form & Payment by Credit Card or Cheque

Name	**Insurance Institute Member Number**
Position / Title	**Email** (for confirmation & credit letter)
Company	**Phone**

Fees (includes GST)

- ☐ $125 IIBC Members
- ☐ $205 Non Members
  (includes IIBC Membership expiring May 31st, 2019)

Payment ***(Payment is due within one week of registration)***

Total: $__________________

- ☐ Cheque enclosed – *payable to* **Insurance Institute of BC**
- ☐ Cheque to follow – *payable & mail to* **Insurance Institute of BC**
- ☐ Credit Card – (VISA/ MasterCard/ AMEX)
  Contact our office to provide credit card details

Cancellation Policy

No refunds. Participant substitutions accepted 48 hours prior to seminar. IIBC reserves the right to cancel the seminar due to unforeseen circumstances. Should this occur, registration fees will be refunded.

OFFICE USE ONLY

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Questions?

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