



CPB
CANADA

CERTIFIED
PROFESSIONAL
BOOKKEEPERS
OF CANADA

ANNUAL REPORT

2024-25



Another year has passed, and I am incredibly proud of the significant accomplishments CPB Canada has achieved. These successes fill us with immense excitement for the future of our profession and the thriving community that surrounds it. As we continue our trajectory of growth, our commitment to being the unquestioned standard-setting body for professional bookkeeping in Canada remains unwavering.

CPB Canada is resolute in establishing the highest benchmarks of competence and legitimacy for bookkeeping professionals. While bookkeeping is a time-honoured profession, we are a relatively new force, in setting the national standard for bookkeepers across Canada. Our professional community is the financial backbone of businesses nationwide, and we recognize the importance of strategic collaborations with other financial professionals to bolster the financial health of Canadian enterprises.

We feel the profound sense of responsibility to maintain unwavering diligence and upholding uncompromising standards. CPBs are not merely good; they are among the absolute best in the industry. They proudly demonstrate their competence, earn trust and respect, and exemplify bookkeeping excellence in Canada.

I am immensely proud of the support our community provides and how CPB Canada actively enhances its value to members while expanding our influence. As we concluded the 2024-25 fiscal year, we made meaningful strides: we increased the number of members and CPB holders, delivered a wider array of programming like the Autumn Tax Primer, and are building a corporate technology infrastructure that will empower us into the future.

It is a true privilege to work alongside our ambitious and dedicated Board of Directors. Their vision and leadership provide the direction, and our skilled team of association professionals work relentlessly to strive for new levels of success.

Thank you all. I am not just confident—I am certain that the best is yet to come.

Rick Johal, CAE, MPA
Chief Executive Officer

This community has been the bedrock of my success as a bookkeeper and business owner. With professional recognition, unparalleled learning opportunities, and a truly supportive network, CPB Canada is where we grow, elevate our standards, and forge our collective future.

The word “together” isn’t just a sentiment; it’s our superpower. Our success hinges on genuine collaboration. We, as a community of dedicated professionals, understand the strength in lifting each other up and raising the bar for our entire industry. As an unregulated profession, the Board of Directors and I keenly understand how important it is to establish and uphold the standards for professional bookkeepers across Canada. This focus guides every discussion we have today and shapes the moves we make for tomorrow. We are on the precipice of a profound shift: where we rethink, reconceptualize, and redefine what it means to be a professional bookkeeper. While many of you grasp this critical need, the outside world largely does not. We have a story to tell that demands to be heard.

I implore you to join the movement on what lies ahead. CPB Canada is not just a vehicle; it is the engine to transform our profession. The future is very exciting.

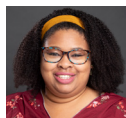
What empowers us to dream so ambitiously isn’t just wishful thinking; it’s the rock-solid organizational and community foundation we’ve meticulously built. This past year, the Board of Directors pushed forward several truly pivotal initiatives:

- 1. Charting our course:** We’ve laid out the future direction with our ambitious 2025-2028 Strategic Plan.
- 2. Investing in excellence:** We’re making strategic investments in educational programming and overhauling the technology infrastructure to serve you better.
- 3. Fortifying our strength:** We’re laser-focused on ensuring fiscal strength and adaptability, dramatically enhancing our capacity as a professional association.

We are incredibly proud of our accomplishments, and we are absolutely thrilled to govern with such ambition as we forge ahead.

Thank you all for making my first year as Chair not just memorable but full of progress. I’m genuinely looking forward to an even more impactful second year, including the chance to connect with more of you—whether in person or virtually. Please, feel free to connect with me on LinkedIn; I’d love to hear from you.

Melissa Lenos, CPB, PCP
Board Chair



Board of Directors

Mission

To empower the profession through leadership, learning, and advocacy. We set the highest standards for professional competence and conduct to cultivate success and promote continuous growth within our community.

Vision

A connected community elevating the accounting profession.

Values

Collaborative Community

As an institution, the Certified Professional Bookkeepers of Canada (CPB Canada) is a collaborative community that provides relevant learning opportunities where mentorship flourishes. By uplifting one another, we create supportive and inclusive networks that elevate bookkeeping practices and stimulate ongoing professional development.

Professional Excellence

Our commitment to the highest standards of reliability and integrity earns respect, trust, and loyalty from Canada's business community. Confidence in our members by clients and employers is unsurpassed. Credibility is the cornerstone of our organization, ensuring that our members are recognized as indisputably accomplished professionals.

Innovation

As an ever-evolving body in support of a dynamic industry, CPB Canada exists at the forefront of emerging trends and technologies. Through exposure to calculated change leadership, our members are empowered with industry-leading innovations. As early adopters of these best practices, bookkeepers are progressive drivers of change for their clients and organizations.

Advocacy

CPB Canada passionately represents its members, championing their expertise and raising their work's public profile and reputation. Through our dedication to advocacy, we drive recognition for our members' outstanding contributions to the bookkeeping profession.

Lifelong Learning We support our members in continuously pursuing relevant learning opportunities. By providing pertinent education, CPB Canada ensures knowledge and adoption of emergent trends in the industry. The resources available to our members give them the knowledge and tools to excel in their domain and become adaptive to a rapidly changing industry.

The 2024-25 year has been a **landmark year for CPB Canada**, marked by groundbreaking initiatives, elevated professional development, and a powerful new voice in government relations. CPB Canada proudly led the charge, empowering bookkeepers and elevating their crucial role in supporting and strengthening our nation's economy.



Autumn Tax Primer: A Resounding Success

CPB Canada launched the Autumn Tax Primer, designed to equip bookkeepers, accounting, and tax professionals with the latest insights for their T1 and T2 tax work. This inaugural event, drawing an impressive 200 participants, brought expert voices to cover a diverse array of essential topics, leaving attendees thoroughly primed to prepare for the upcoming tax season. CPB Canada was pleased to have Intuit QuickBooks as a key sponsor.



Championing Mental Health

Recognizing the demanding and often stressful nature of the profession, CPB Canada proudly launched dedicated programming during Mental Health Awareness Week. The intent being to provide a vital platform to address a challenging yet deeply personal topic. Through expert-led discussions, attendees explored essential tools, support systems, and the importance of healthy boundaries. Peer conversations fostered an environment of understanding, allowing professionals to share insights on recognizing signals and signs of stress, along with effective coping strategies. CPB Canada acknowledges the shortcomings of the accounting industry on mental health and is committed to taking a proactive leadership role on this incredibly important matter.

Strategic Government Relations: A New Era of Advocacy Begins!

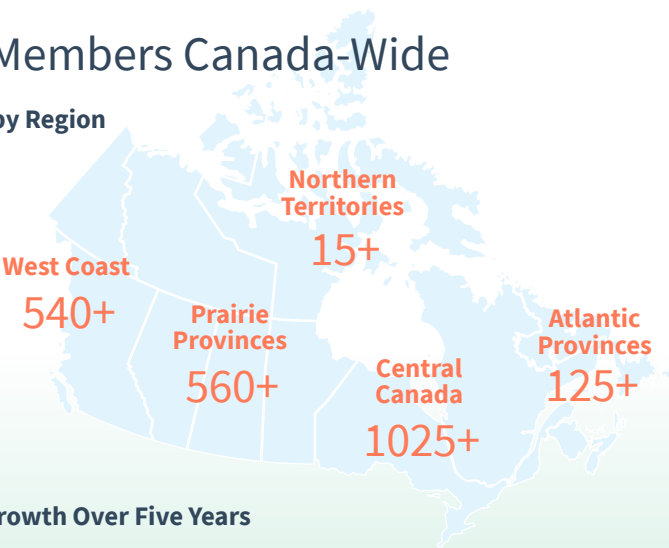
CPB Canada took a significant stride forward in its advocacy efforts by engaging StrategyCorp as a

consultant to build upon ongoing government engagement. A pivotal focus group was convened to develop a formal Government Relations Strategy for the association. This strategic roadmap, set to roll out in 2025-26, will serve as a guiding force for specific issues and targeted advocacy investments, ensuring the voice of Canadian bookkeepers is heard at the highest levels of government. This marks a significant gain in momentum, solidifying CPB Canada's position as a key stakeholder in policy discussions impacting the profession.



2300 Members Canada-Wide

Members by Region



Member Growth Over Five Years



CPB Certification



1210+

Total designated CPBs

34%

Growth in Designated
Members in 2024/2025

IGNITE Conference

560

Participants



National
Bookkeeping
Week Events



778

Registered

Personal Development



80+

Hours of education

43

Events

Registrants

4340

Registrants

555

GST/HST
Sessions

140

Tax Tune Up
Workshops

200

Autumn Tax
Primer

Regional Meetings



104

Meetings

2297

Registered

Collaboration Corner



9

Events

398

Registered



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“As someone who is internationally educated and has worked in bookkeeping, accounting, and small business consulting for over a decade, earning the CPB designation has been a transformative milestone in my career. It served as the perfect bridge to transition into the Canadian market, giving me not just recognition but a renewed professional identity. The designation validated my global experience and skills, helping me stand out with confidence. I’m elated by this achievement and look forward to a meaningful and fulfilling journey ahead with CPB Canada.”

Subarna Paudel, CPB

“I’m grateful to CPB Canada for recognizing the expertise of bookkeepers. Being part of this professional community inspires me, and I’m excited to keep growing, refining my skills, and delivering meaningful value to every client I work with!”

Veronica Berube, CPB



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“Earning my CPB designation is more than just a credential—It’s a reflection of my commitment to excellence in bookkeeping and continued professional growth. When I started this path, I never imagined how rewarding it would be to grow into this profession. I’m incredibly thankful to CPB Canada for creating a designation that gives bookkeepers the recognition we’ve worked hard for. Being part of this professional community makes me feel seen, valued, and motivated for what’s next.” **Aileen Acosta, CPB**



“Earning my CPB designation marks a significant milestone in my career, affirming my commitment to excellence, integrity, and lifelong learning in the bookkeeping profession. This achievement empowers me to better support Indigenous communities and businesses, providing them with trusted financial expertise and contributing to their sustainable growth. Being part of CPB Canada strengthens my mission to uphold professional standards and create lasting, positive impacts through financial stewardship.” **Rajneesh Khugsal, CPB**



Bookkeeping Excellence Awards

The Bookkeeping Excellence Awards recognize those who uphold CPB Canada’s standards, enhance the bookkeeping industry in Canada, and make exceptional contributions to their community, clients, and the association.

2024 Bookkeeping Excellence Awards Recipients



Volunteer of the Year
Melissa Michalski, CPB
Westyn & Co



Emerging Leader of the Year
Amna Khan *KATA Accounting Solutions*



Professional Leader of the Year
Rachel Devine, CPB *On Track Bookkeeping Solutions Ltd.*



Distinguished Service Award
Bianca Mueller, CPB
Wagepoint



Firm of the Year Award
Tim Hayward, CPA
balncd Inc.

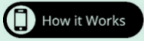


New Firm of the Year Award
Natalie Marshik, CPB
Chickadee Nonprofit Solutions Inc.

CPB Sets the Professional Standard

Setting the Standard for Canadian bookkeeping

The Certified Professional Bookkeeper (CPB) designation represents Canada’s standard for bookkeeping competence and professionalism. Backed by verified experience, a proctored national exam, and a commitment to ethical practice and continuing professional development, the CPB designation confirms that a bookkeeper has achieved the professional standard



CPB Competencies: Proven. Practical. Professional.

- **Inventory**
- **Period-End**
- **Payroll**
- **Sales Tax**
- **Bookkeeping Knowledge**
- **Accounts Payable & Accounts Receivable**

Take the next step in your professional journey.

IGNITE2024



IGNITE 2024 Winnipeg, MB We brought the IGNITE conference to central Canada for the first time! In addition to bringing together hundreds of professionals and industry partners for learning and connection, Winnipeg brought many new surprises. We kicked off the week with two local Winnipeg walking tours which were a hit! We combined the Awards Gala and CPB Canada Social for one glorious night of recognition and fun and we were grateful to welcome local officials, MLA Billie Cross, Mayor Scott Gillingham and Indigenous hoop dancer Brian Clyne to our stage. Our local Winnipegers showed their hospitality by running a Manitoba Social for all attendees helping us raise money for our conference charity and we made some significant policy changes during our in-person AGM.

NATIONAL BOOKKEEPING WEEK



National Bookkeeping Week 2025 National Bookkeeping Week transcended political divides, garnering broad recognition across all Federal party lines and serving as a powerful platform to elevate the bookkeeping profession to unprecedented heights. In a testament to the growing significance of bookkeepers, regional celebration events were held across Canada, fostering community and spotlighting the vital contributions of professionals nationwide. This impactful week was made possible through the invaluable partnerships with our esteemed sponsors: Intuit QuickBooks, Payworks, TelPay, and Xero. Their support proudly represents the collective commitment to championing the bookkeeping community.

5-Year Revenue Growth and Diversification

The association has experienced steady and substantial financial growth, with a 99% increase in revenues over the past five fiscal years. This growth reflects the success of our strategic initiatives and our commitment to diversifying revenue sources to ensure long-term sustainability.

Strategic Financial Highlights

Diversified Revenue Streams

Reduced reliance on any single source by maintaining a balanced mix of membership dues, conferences, programs, certification, and investments. Non-dues revenue now accounts for a larger share of total revenue, enhancing financial flexibility.

Growth Areas

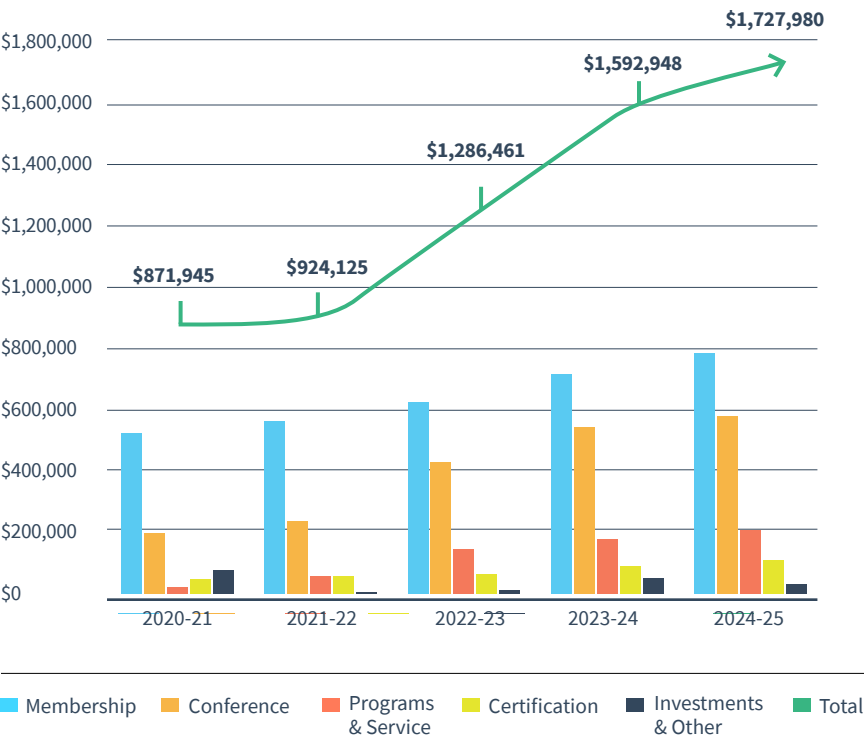
Programs, services, and certification are expanding rapidly, driven by increased participation and demand for relevant professional development.

Core Contributors and Sustainability

Membership dues and conference revenue remain foundational, reflecting strong engagement and stability. Year-over-year growth has been consistent.

Capacity Building

Increased revenue fuels reinvestment in people to power our future growth, member services, digital infrastructure, and professional development initiatives.



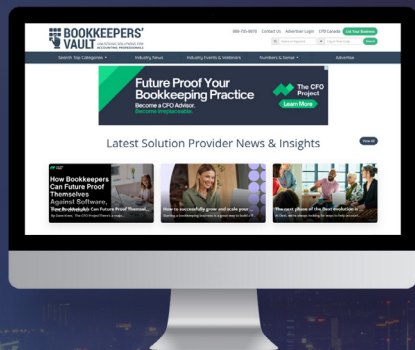
YOUR COMPETITIVE EDGE STARTS HERE.



NUMBERS & SENSE

is your quarterly professional development boost — packed with insights, trends, and expert advice from Canada's top accounting minds.

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UNLOCKING SOLUTIONS FOR
ACCOUNTING PROFESSIONALS

is your go-to print & digital marketplace — showcasing the latest tools, tech, and services to help you and your clients work smarter.

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Two essential CPB Canada resources for today's accounting professionals to stay sharp, efficient, competitive and ahead of the curve!

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