

Internal Controls & Writing a Great MD&A

FACULTY PROFILES

Eric Anastacio

Senior Consultant, IT Governance, Risk and Controls

CIBC

Eric Anastacio has been in the accounting industry for over 20 years. Eric initially started out at PwC in the Financial Statement Assurance practice and then gained substantial experience in Internal audit and most recently Information technology. Eric holds a BBA, CIA, CISA and CRMA and his passion for education led him into pursuing a Masters in Education focused on career and technical education. Eric currently works at CIBC as a Senior Manager, IT Governance. Eric views the MD&A as a key document as it informs potential shareholders with a holistic view of the organization and potential investors.



Norman Baldwin

Managing Partner

GRC Vista Risk Consulting

Norman's career in corporate reporting spans more than 30 years. As Operations Manager for First Generation Capital, he oversaw compliance and communications for the parent company plus an extensive and diverse portfolio of subsidiaries in Canada, the Philippines, and the USA. He later performed the same managerial role for projects in Canada and southern Africa with Resource Group and Lion Mining Finance. He subsequently spent 23 years in Brazil, where he advised a long list of major corporations on their MD&A reporting, and trained their staff teams on international reporting and risk management practices and standards. He is currently a managing partner of GRC Vista, which provides governance, risk, and compliance consulting services to groups in Canada and Brazil. Norman holds a BA from the University of British Columbia, and an MBA in Strategic Management from the Federal University of Paraná in Curitiba.

FACULTY PROFILES



Mark E.S. Bernard

Founder

The Bernard Institute for Cybersecurity Excellence

Cybersecurity has been my focus for over 20+ years. I have assisted many organizations from Government, Fortune 50 Banking, Hospital Health Authority, Unicorn US Federal Cloud Service Provider, Nano Technology Laboratory, Pharmaceutical Manufacturers, Legal Firms, Technology Manufacturing, Food Manufacturing, Clothing Manufacturing, Telecom Service Provider, Internet Service Provider, Fortune 50 and 100 Cybersecurity Service Providers, Financial Services Providers and Insurance Companies. Organizations with 8 employees to 150,000, Global companies operating in USA, Canada, South America, Europe, Asia and Africa. Size does not matter in Cybersecurity, because just one exposure can lead to a breach.

I have remained independent, which makes my opinion more objective than my competitors, I do not have any overhead, nor do I have any monthly sales quotas that make me agile, I do not have secret third-party agreements. My standard for quality deliverable is equal to or higher than my competitors. I have solved many Cybersecurity problems for Government Ministries, Commercial businesses and helped close new deals and generate new business opportunities that have put smiles on Executive faces. I have accomplished this during good and bad business conditions such as this pandemic, I am always open for new opportunities.

FACULTY PROFILES

Leon Bloom

Consultant

Deloitte

Leon Bloom has served as a senior Deloitte partner for more than 20 years in Canada and globally and is a founding partner of Deloitte's global Risk Advisory practice (formerly global Enterprise Risk Services). He served several terms as an Executive Board member of Deloitte's Global Financial Services Industry (GFSI) practice and served as the firm's GFSI Global Deputy Managing Partner for more than 12 years. Leon specializes in risk and capital management in the banking, asset management, property & casualty insurance, life insurance and re-insurance sectors. He has extensive global experience advising regulators, deposit insurers, major financial institutions and rating agencies on governance and regulatory supervision and risk and capital management including for Basel II, Basel III, Solvency II, economic capital, capital optimization and rating agency ratings.

He is a co-architect of Deloitte's Enterprise Risk Management (ERM) methodology and has led its implementation in leading financial institutions globally. Leon has had articles, papers and interviews published including on Bloomberg TV and in The Economist, The Wall Street Journal, American Banker, The Financial Times, European American Business Journal, Bermuda Reinsurance, Bank Director, Australian Banking & Finance, and China Business Daily. Leon is a co-author of the 'Basle Implementation Handbook' published by Erich Schmidt Verlag (ESV) and Information Technology Control Guidelines' published by the Canadian Institute of Chartered Accountants. He has been a guest lecturer at the Fisher Management School at the Ohio State University, Columbus, Ohio, USA and the Rotman School of Management at the University of Toronto in Toronto, Canada. Leon has also been a speaker in the U.K. at Bank of England Risk Management Symposia. He routinely addresses Board of Directors meetings and retreats, senior executive meetings and leading industry conferences and seminars.



Suzanne Dunn

Manager, Internal Audit

Pacific Blue Cross

Suzanne Dunn is the Manager, Internal Audit at Pacific Blue Cross (PBC).

Since joining the department in 2019, she has been developing an outstanding team, adopting an agile approach to internal auditing and building client relations. Her team brings value to the organization, Board, clients and members of PBC through holistic risk-based auditing.

Suzanne has over 30 years of professional experience in internal audit, external audit and business valuations in public practice, higher education and insurance/ healthcare. Her qualifications include CPA, CA; CBV (retired); CIA and CRMA.

FACULTY PROFILES

Richard Leblanc

Professor of Governance, Law & Ethics

York University, and Independent Advisor to Boards

Dr. Richard Leblanc is one of Canada's leading experts on corporate governance and accountability. He is an award-winning teacher, researcher, lawyer, public speaker, consultant and specialist on boards of directors. He teaches at leading universities including Harvard University. He received a teaching award as one of the top university teachers in Ontario; was named to Canadian Who's Who; and is an alumnus of Canada's Top 40 Under 40 TM award.

Dr. Leblanc brings to business and professional audiences a depth of information from his extensive research and work with over 250 organizations and boards, and training and development of over 1,500 directors and managers. He is engaging, dynamic, and personable. Because of his work with leading companies and current research, he is always on the cutting edge of emerging global developments.

Dr. Leblanc has authored over 200 publications and reports, delivered over 450 invited speeches and training sessions, and sat for over 450 media appearances.

Dr. Leblanc is Editor of "The Handbook of Board Governance: A Comprehensive Guide for Public, Private, and Not-for-Profit Board Members," which has sold 7,000 copies worldwide; a forthcoming Second Edition in May 2020; and the seminal "Inside The Boardroom," which has sold over 6,500 copies. His work has been described by various faculty at Harvard, Yale, London Business School and elsewhere as "great & much needed," "wonderful and pragmatic," "thorough" and "nothing short of remarkable," as well as by Fortune 500, NYSE, FTSE and other company leaders as "leading edge," "ground-breaking," "valuable guidance," "indispensable," "compelling" and "exceptional."

Dr. Leblanc's insight has guided leaders of organizations through his teaching, research and direct consultation to national and multi-national corporations and government regulators. He has provided extensive service as an external advisor to boards of directors that have won national awards and peer endorsement for their governance practices. His applied research has been used by, and he has advised, financial and securities regulators, investors, and board and committee chairs. He has been retained to advise on under-performing boards to implement governance and shareholder accountability reforms. He has advised boards, board committees, committee chairs and CEOs, and has advised on CEO performance and director and CEO succession planning and removal, consistent with shareholder value creation and stakeholder accountability.

Dr. Leblanc is frequently consulted by stakeholders - such as companies, investors, associations, partnerships, not-for-profit organizations, Crown organizations, the media and regulators - for the latest developments and trends, and customizes his speaking engagements and consultations to suit all types of audiences. He is the founder and principal of Boardexpert.com, an advisory firm providing customized governance transformation.

Dr. Leblanc possesses an extensive professional network. He is the founder of Boardexpert.com Inc and the LinkedIn Groups "Boards and Advisors," and "Audit Committees," with almost 30,000 and 15,000 members globally, which are among the largest and most active online corporate governance groups.

FACULTY PROFILES

His regular newsletter is accessible to 40,000 directors and other governance professionals.

Dr. Leblanc adopts a framework for governance effectiveness developed over several years. His work, directly or indirectly, has impacted companies throughout the world, including those that have used Dr. Leblanc's methodology to strengthen their governance effectiveness and accountability practices.

Dr. Leblanc holds a Bachelor of Science degree, an MBA, Canadian and American law degrees, a Masters in Law, and a PhD focusing on board of director effectiveness.

He can be reached at rleblanc@boardexpert.com, on Twitter at [@drrleblanc](https://twitter.com/drrleblanc), or through his LinkedIn group, Boards and Advisors.



Eric Lung

Partner

Dentons Canada LLP

Eric Lung is a senior associate practicing in Dentons' Vancouver office and is a member of the Securities and Corporate Finance group. Eric's practice is focused primarily on corporate, securities and transactional matters, with a particular emphasis on mergers & acquisitions, financings and corporate reorganizations. He has assisted public and private companies in various types of transactions, including acquisitions and divestitures, arrangements, public offerings, private placements and joint ventures. In addition, Eric has comprehensive experience advising clients on a variety of securities law, corporate governance and strategic matters, as well as general corporate and commercial matters. Eric's industry experience includes mining, cannabis, manufacturing, health care and consumer products.

Matt MacDonald

Senior Manager, Performance Improvement & Managed Business Services

Protiviti

Matt is a management consultant with extensive experience in finance transformation and business strategy, having led projects ranging from process improvement to the design and development of technology solutions. Matt previously worked in the Strategy & Operations consulting practice at EY. Prior to joining Protiviti he worked in Benin, West Africa, promoting sustainable economic development and coaching small business owners on financial management and how to scale their businesses. Matt holds a Master's Degree in Finance and Management.

FACULTY PROFILES

Daniel Palumbo

Manager, Business Performance Improvement

Protiviti

Daniel is a Manager at Protiviti with over six years of experience delivering performance improvement, risk management and financial transformation advisory work. Throughout his career he has worked to enhance businesses through a focus on operational effectiveness, financial judiciousness and sound strategic planning. His project experience includes leading and supporting project teams for clients in a range of industries from financial services to information technology and software.