Knowledge Bureau®
Excellence in Financial Education

A national educational institute
able to tailor training solutions
to the unique needs of your advisors.

Knowledge Bureau®
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Partner with an Educational Institute Focused Exclusively on Real Wealth Advisor Training.

Integrate your own firm's unique value-add to create your own Wealth Management Certification Program.

The Knowledge Bureau has provided training and certification programs in true tax-based wealth advisor and financial planning to over 10,000 advisors.

The Knowledge Bureau has been hired by Canada's leading retail advisory firms to customize their own in-house certification programs for wealth advisors.

"Not all firms are the same. Not all advisor teams are the same."

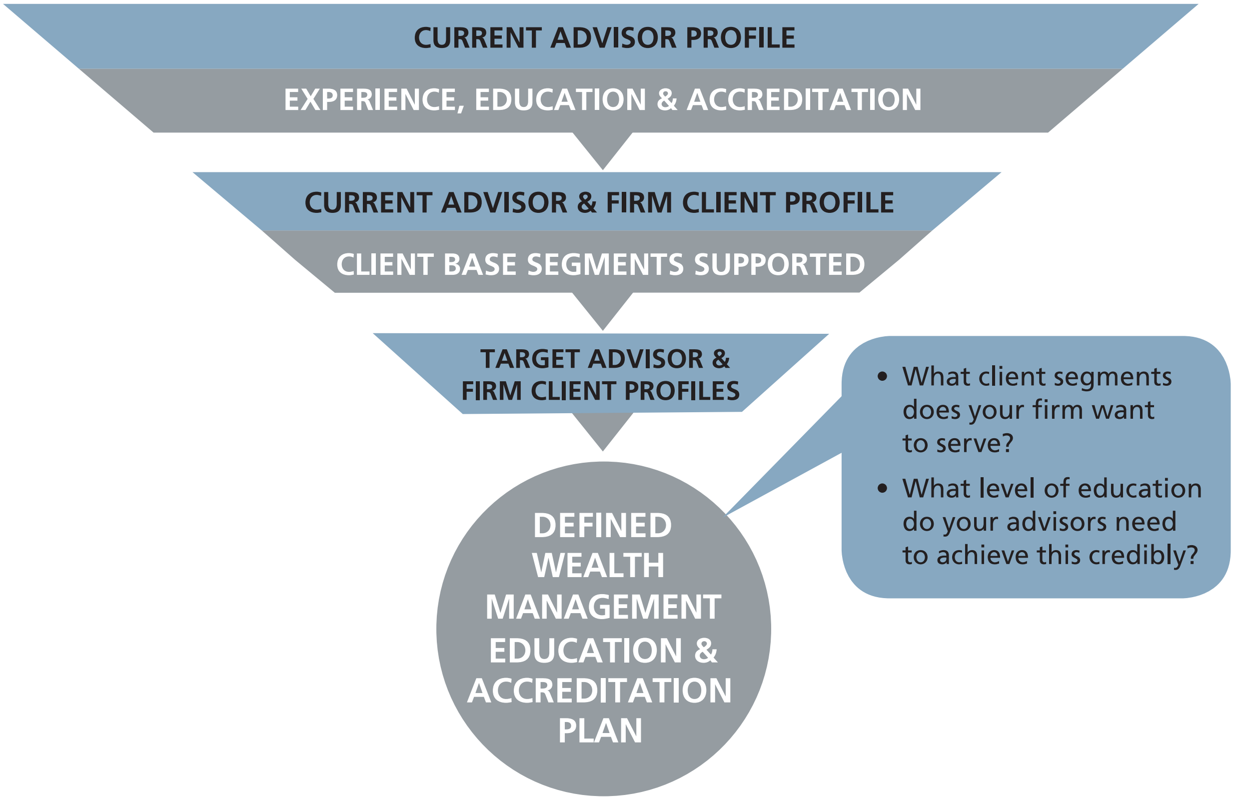
The Knowledge Bureau is the only educational institute in Canada with the experience to customize your training program and content to your unique needs, integrating your well-known brand into a prestigious national academic program.

The Knowledge Bureau has over 40 tax-based wealth management courses being continuously delivered around the country. Training programs include self-study courses, regional workshops, books, webinars, subscription services and the MFA™ and DFA Specialist™ designations.

The Knowledge Bureau is certified by Human Resources and Skills Development Canada (HRSDC) as a private national educational institute providing courses leading to the Distinguished Financial Advisor and Master Financial Advisor (MFA) designations for practicing professionals.

These programs are delivered by leading faculty, authors, speakers and academics in the tax and financial services. President Evelyn Jacks has directed training for tens of thousands of professionals in the financial services, tax and accounting fields for over 30 years. Now your firm can come up to speed quickly, utilizing existing course offerings or structuring a program defined by your own standards and processes to get the results you want.

Advisor Educational Strategy Map



Assess advisor capability across your firm and engage The Knowledge Bureau to help you develop an educational game plan to best serve your firm's target client segments.

Customized education doesn't cost Millions... but it can position your firm to attract Millions by having advisors confidently approach real wealth management opportunities with their clients, supported by their "home team".

However, in house expertise to develop and maintain curriculum can cost Millions. Fortunately, with the help of the Knowledge Bureau, firms do not have tailor. It's your choice. We can help you develop your curriculum on a turn key basis without the time and money consuming curriculum development costs.

The Knowledge Bureau can help build an advisor education strategy to meet your budget. This can include advocating training for your advisors by sponsoring partially or fully individual courses leading to accreditation or sponsoring full accreditation programs.

Even more important, once trained, The Knowledge Bureau partners with you to provide ongoing support for your advisors with the latest tax and advisory information and analysis to keep advisors on the leading edge with the most current news and issues affecting their clients' wealth.

Canada's Leading Advisory Educator & Noted Tax Expert

Evelyn Jacks is the Founder and President of the Knowledge Bureau — a pioneer in the training and certification of tax-astute wealth advisors. She is one of Canada's most prolific authors, an educational publisher and an award-winning entrepreneur.
She has written over 40 books on the subject of personal taxation and leadership-based wealth management, including the Essential Tax Facts series.

"Our goal is to help you help your advisors lead their clients to better results through the highest standards of knowledge-based services."
Evelyn Jacks, President

PLEASE CONSIDER:

- Are you comfortable with the level of knowledge of your advisors?
- Does your firm have a current mapping of your advisor experience, capability, accreditation & potential?
- Does your firm have a minimum defined standard for advisor wealth management training?
- Does your firm have knowledge of all industry accreditation designations available in wealth management, tax and financial planning?
- Does your firm have a group of senior advisors who should be moving their skills forward to meet the needs of families with real intergenerational wealth?

Work with Knowledge Bureau to build and deliver a resource-smart educational plan today. Please contact us today to find out more.

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