

# No, it's not *that* kind of calculator.

## The Client Relationship Toolkit: Innovative Calculators to Document Your Client Experience



### TRY THEM ALL!

Financial Assessment Calculator  
Income Tax Estimator  
Investment Income Calculator  
Registered vs Non-Registered Savings Calculator  
RRSP Savings Calculator  
Take Home Pay Calculator  
Cash Flow Calculator  
CPP Income Calculator  
Debt Reduction Solutions Calculator  
Fixed vs Variable Income Calculator  
Marginal Tax Rate Calculator  
Tax Efficient Retirement Income Calculator  
Donations Savings Calculator  
Tax Efficient Assets Transfer Calculator

Your clients need a wealth advisor who can provide smart solutions, simplifying many complex factors so that making decisions is easier. Knowledge Bureau has created a powerful toolkit to help you efficiently deliver those solutions to your clients.

**Discover 14 innovative online calculators that will save you and your clients' time and money.**

14 client-centric calculators and tools including:

- Client interview checklists
- Financial assessments
- Tax efficient calculators for investments, retirement and estate planning

Visit [knowledgebureau.com/calculators](http://knowledgebureau.com/calculators) for a **FREE TRIAL!**



**Knowledge Bureau®**  
Excellence in Financial Education

T: 1-866-953-4769

E: [registrar@knowledgebureau.com](mailto:registrar@knowledgebureau.com)



# e-Learning Registration Form

Order Online @ [knowledgebureau.com](http://knowledgebureau.com)

## STEP 1: Identification

Name	Company	Returning Student ID #
Address	City	Province
Postal Code	E-Mail	Referred by IPBC
Phone (     )	Fax	Current Designations/ Licensing in Good Standing

## STEP 2: Choose Your Calculators

- ☐ **Knowledge Bureau ToolKit:**
- ☐ Income Tax Estimator
  - ☐ Marginal Tax Rate Calculator
  - ☐ RRSP Savings Calculator
  - ☐ Financial Assessment Calculator
  - ☐ Cash Flow Calculator
  - ☐ Take Home Pay Calculator
  - ☐ Investment Income Calculator
  - ☐ Registered vs Non-registered Savings Calculator
  - ☐ Debt Reduction Solutions Calculator
  - ☐ Tax-Efficient Retirement Income Calculator
  - ☐ CPP Income Calculator
  - ☐ Fixed vs Variable Income Calculator
  - ☐ Tax-Efficient Asset Transfer Calculator
  - ☐ Donations Savings Calculator

Interested in purchasing individual calculators?  
Call us! 1-866-953-4769

## WHAT OUR CLIENTS ARE SAYING:

*"This diversified shelf of financial calculators assist in different aspects of a financial plan and have made my preparation for client meetings or follow-up meetings much easier. Each calculator touches on issues that will illustrate whether or not my client would meet their goals today, or find out what needs to be done to meet their goals in the future. They help me get right to the point for clients who don't want to read a 50 page report!"*

— Kevin, Financial Planner

## STEP 3: Choose Your Subscription

**Consider a 1 Year Subscription for best rate!**

Subscription Period	All Calculators	Single Calculator <sup>1</sup>
1 Year Subscription	<input type="checkbox"/> \$849.95	<input type="checkbox"/> \$99.95
6 Month Subscription	<input type="checkbox"/> \$449.95	<input type="checkbox"/> \$59.95
3 Month Subscription	<input type="checkbox"/> \$249.95	<input type="checkbox"/> \$33.95
1 Month Subscription	<input type="checkbox"/> \$99.95	<input type="checkbox"/> \$19.95

### <sup>1</sup> Single Calculator Worksheet

If purchasing multiple single calculators, complete the following:

\_\_\_\_\_ calculators x \$\_\_\_\_\_ (sub period rate) = \$\_\_\_\_\_

## STEP 4: Choose Your EZ-Pay Method

☐ Credit Card: ☐ Visa ☐ MC ☐ Amex

Card Number \_\_\_\_\_  
 Expiry Date \_\_\_\_/\_\_\_\_  
 Name on Card \_\_\_\_\_  
 Signature \_\_\_\_\_

☐ Cheque or  
Money Order

Mail to: Knowledge Bureau  
187 St. Mary's Road  
Winnipeg, MB R2H 1J2

(GST/HST 885004713RT0001)

## STEP 4: EZ-Order Options

EZ-Order Online: 1. Login with your Student ID  
2. Select Calculators/Toolkit and Register

Or Enrol by Phone or Fax:

Phone: 1-866-953-4769 Fax: 1-204-953-4762

Lost your student ID/password? Call or email [registrar@knowledgebureau.com](mailto:registrar@knowledgebureau.com)



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