Faculty Guide

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They will not provide advice unless they are appropriately registered and licensed, and appropriately qualified to do so. We expect that our associates will and have made themselves aware what type of advice is under jurisdiction of regulators.

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Tax, Accounting and Financial Services Professionals in Canada

Knowledge Bureau is a national post-secondary educational institute and publisher focused on excellence in financial education for advisors and their clients. Through online courses and live learning events taught by industry leaders, over 10,000 professionals have earned their certification, diplomas and professional designations to fill knowledge gaps, excel in their careers and position their professional practices for change and growth.

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☑ Cobranded online course modules
☑ Custom designed one to three day in class programs
☑ Plan and populate conference speakers
☑ Train workforces to earn CE/CPD credits, certificates, diplomas
☑ Designations

For a complimentary consultation please contact:

Executive Project Manager: Barbara McRae
Email: barbara@knowledgebureau.com
Skype:babs.mcrae16

Program Director: Evelyn Jacks
Email: evelyn@knowledgebureau.com
Skype: evelyn.jacks

Testimonials

Evelyn Jacks and her team of experts at The Knowledge Bureau have been a significant part of the success of Dynamic's award winning Snapshots program. Snapshots is an online resource centre helping advisors provide customized and personalized advice and resources to clients at various life changing events. It won both the Investor Education Award and Advisor Education Award at the Canadian Investment Awards in December 2009. Evelyn and her team provided valuable in depth advisor education courses on a variety of the life events covered including Leaving a Job, Ailing Parent, Home Ownership and Disability. Their continuing education accredited courses have been taken by thousands of advisors across Canada who are interested in strengthening their relationships with clients by offering holistic advice as their clients' lives change.

Terri Williams, Vice President, Editorial and Advisor Services
Dundee Wealth

It has been an absolute pleasure working with Evelyn Jacks and The Knowledge Bureau faculty over the past two years. Evelyn and her team have consistently delivered some of the highest calibre training in the Financial Industry.

Evelyn's commitment and passion for financial education is truly outstanding and readily apparent in every venture she undertakes. We look forward to an ongoing relationship with The Knowledge Bureau as an integral component of our success.

Lori Campbell, Senior Business Development Manager
Sun Life Global Investments

In Mutual Fund Wholesaler Dimensions Standard Life is the number one company in Canada overall, #1 in the general survey in 6 of 9 categories and 8 of 9 in Core Supporter scores, based on a 2009 Environics Survey. We are very pleased with these results, which are, in part due to our great relationship with you, Evelyn, and The Knowledge Bureau.

Mick Kelly, Vice President - Sales
Retail Markets - Standard Life

I had the opportunity to attend the Distinguished Advisor Conference recently in Tucson, Arizona hosted by Evelyn Jacks and The Knowledge Bureau. This conference is top notch, not only providing timely and relevant information, but motivated and dynamic speakers. It is also clear that great attention to detail is taken when selecting a location for maximum enjoyment and impact. If you're looking to top grade yourself or your staff I highly recommend both the Distinguished Advisor Conference and the courses that Evelyn has to offer through The Knowledge Bureau.

Susan L. Misner, B.A. (Econ)
Golden Girl Finance

Contents

Leadership Team

Evelyn Jacks

President
Knowledge Bureau

Evelyn is the best-selling author of 51 books on personal tax and wealth management, a multiple-award-winning entrepreneur and the Founder and President of the Knowledge Bureau, Canada's leading national post-secondary educational institute focused on professional development in the tax and financial services industry. Knowledge Bureau is also a leading publisher of financial books and e-books.

Evelyn was recently named one of the Top 25 Women of Influence in Canada for the second time. This year she is also President of the Manitoba Club, Western Canada's oldest private business club.

Evelyn is a highly respected and influential news commentator and analyst. She has written thousands of articles for numerous publications, most recently in MoneySense Magazine, the Toronto Star and for the Toronto Stock Exchange. She appears regularly on CBC Newsworld, CTV News, BNN and regional television and radio outlets.

She was appointed by Finance Minister Flaherty to the Federal Task Force on Financial Literacy, and by the Premier of Manitoba to the Lower Tax Commission, to advise on the direction of the provincial tax regime. She has contributed her expertise to numerous public and private boards, and most recently has co-founded the Manitoba Financial Literacy Forum in partnership with the Manitoba Securities Commission to increase financial literacy in the province of Manitoba.

Evelyn has been awarded the prestigious Rotman School of Business Canadian Woman Entrepreneur of the Year Award. She was also recognized internationally with a Business Leadership Award by the Canadian Embassy in Washington, D.C. and named an Inspiring Woman by the Winnipeg Free Press. She has twice been recognized as Manitoba's Woman Entrepreneur of the Year. She has also received the YM-YWCA "Business Woman of the Year" award.

Alan Gordon

Director of Operations
Knowledge Bureau

Knowledge Bureau's mission is to raise standards for excellence in financial education with relevant and practical knowledge and skills. Alan's role is to promote operational excellence within that vision.

Alan has been involved in implementing the virtual campus operating frameworks, policies and procedures for Knowledge Bureau since its inception in 2003. As Director of Operations, Alan is responsible for the direction of campus operations from strategic process development and control, to project management and on time delivery of services. He is also responsible for the supervision of staff and partners in implementation.

Previously, Alan worked in operations, primarily in the manufacturing sector. He has been involved in operations excellence for management, quality and process control, continuous improvement engineering and Information Technology within the business community in Manitoba.

In 2010, Alan Gordon had the honour of being elected chairman of the board for the Manitoba Consortium of Manufacturing Excellence, providing a unique experience of working with the Canadian Manufacturers and Exporters and leveraging best practices through over 12 companies within the province.

Barbara McRae

Executive Project Manager
Knowledge Bureau

With over 15 years' experience planning and executing live events, Barbara is the Executive Project Manager for Knowledge Bureau. She is responsible for all event content and logistics including the Distinguished Advisor Conference™, The Distinguished Advisor Workshops™ as well as numerous Private Client projects.

Barbara has worked with Knowledge Bureau for 10 years ensuring that each event captures the goals and objectives for all key stakeholders, and that learning participants have a fulfilling and meaningful experience.

Through her work with Knowledge Bureau and the Distinguished Advisor Conference™, Barbara has been nominated 3 times for the Canadian Star Award which recognizes outstanding contributions for Conference Content and Planning.

Authors, Course Instructors and Workshop Leaders

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Jenifer Bartman

Faculty Participation: Author, Course Instructor
Focus: Management, Venture Capital

Jenifer Bartman, CA, CMC is the Founder and Principal of Jenifer Bartman Business Advisory Services, providing advisory and contract executive services to companies in the early, financing, growth, and transition stages of development. Service areas include business and succession planning, marketing and expansion strategy, financing readiness, financial analysis, and operational improvement.

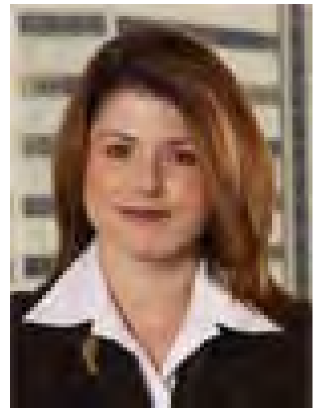
An experienced senior executive, she held the broad based role of Vice President & Chief Financial Officer of ENSIS Management Inc., a venture capital fund manager, for over nine years. Prior to this role, Ms. Bartman worked as a management consultant, providing consulting and business advisory services to organizations across a wide range of industries.

She holds the designations of Chartered Accountant (CA) and Certified Management Consultant (CMC) and is a graduate of the University of Manitoba, Faculty of Management where she completed a Bachelor of Commerce (Honours) degree, majoring in marketing and human resources. Ms. Bartman is also a consultant in CMC Canada's MAS/IRAP program.

Ms. Bartman has been a sessional instructor in the University of Manitoba Intellectual Property and Technology Commercialization Management certificate program, delivering a course that she also developed. A published author (*Master Your Investment in the Family Business: How to Increase After Tax Wealth*) and Expert Contributor (*It's Your Money, Honey*), her work has appeared in numerous venues, including Private Capital, Canadian Capital, Golden Girl Finance, Yahoo! Finance, CareerVision, and Divestopedia.

Over the course of her career, she has been a guest speaker at various events covering a variety of topics, including succession planning and venture capital. She has developed and delivered an early stage financing webinar series for CPA Canada, attracting over 10,000 participants thus far.

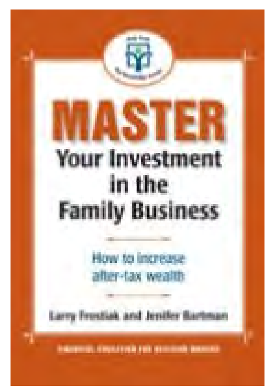
Ms. Bartman has a long history of community and business association volunteer positions, and has been involved with the Canadian Venture Capital Association since 2001. She is currently a member of the Professional Development Committee and the Editorial Board and has served on the Annual Conference Committee. She is also on the Board of Directors and Executive and Finance (Chair) Committees of Economic Development Winnipeg Inc, as well as a member of the Steering Committee of the Grey Cup Festival 2015. She was recognized for her volunteer efforts as the inaugural recipient of the Intercontinental Hotels Group Canada 2007 CSTA Community Service Award, presented by the Canadian Sport Tourism Alliance.



Certificate Courses:

- Fundamentals of Succession Planning
- Business Valuation for Advisors

Books:



Paul K. Bates

Faculty Participation: Author, Workshop Leader
Focus: Executive and Academic Leadership

A Chartered Professional Accountant (CPA), Fellow of the Society of Management Accountants (FCMA) and Certified Management Consultant (CMC), Paul's career has spanned: senior academic administration; business and divinity school lecturing; investor advocacy; capital markets regulation; corporate and not-for-profit governance (public & private); investment dealer executive leadership with P&L accountability; expert witness and international consulting in the financial services sector, in the areas of compliance and product development. An experienced director, Paul has been a director on over twenty, corporate, regulatory and non-profit boards. He has also been a top-rated speaker at Knowledge Bureau's Distinguished Advisor Conference.

Books:

He is currently serving at McMaster University as Special Advisor to the President, following almost seven years as Dean at the DeGroote School of Business. During his Deanship, The School received accreditation by AACSB – the Association to Advance Collegiate Schools of Business, developed four new master's degree programs (the first new degrees in 25 years!), almost tripled enrolment in the MBA program and tripled enrolment in doctoral studies. In particular, during his time as Dean, Paul led the planning, development and establishment of DeGroote's Ron Joyce Centre in Burlington. This $28million, state-of-the art facility is home to DeGroote's MBA and executive programs and is a hub for academic and economic collaboration in the City of Burlington and the Halton Region.

As a former Adjunct Professor at the University of Toronto's Rotman School of Management, he was awarded an Outstanding Teacher Award in 2003 and again in 2004. Bates recently completed a second edition of his best-selling book, Sales Force Management in the Financial Services. His new book, ***What I have learned so far and how it can help you***, co-authored with Al Emid, a noted journalist, is also a best-seller. Both books have made it to the GlobeAdvisor top ten books for business list.

Following service on the boards of the Toronto Stock Exchange and the Canadian Investment Dealers Association, in 2003 Bates was appointed as a part-time commissioner to the Ontario Securities Commission; he completed his second and final term on June 10th 2009. He also chairs the Investor Education Fund and is a member of the OSC's Investor Advisory Panel. Paul also serves as a Director for Evangel Hall Mission in Toronto. Paul has held the president's office at four major brokerage and investment firms, most recently at the helm of Charles Schwab Canada (later acquired by Bank of Nova Scotia). His experience includes executive management in established firms and also successful "de novo" start-ups. In January 2008 Paul was appointed to a three year term to the Social Sciences and Humanities Research Council of Canada (SSHRC). Now in his second term he is chair of SSHRC's Program and Quality Committee.

Paul has recently attained his Master of Theological Studies, M.T.S. with a specialization in Pastoral Studies, at McMaster University's Divinity College. He will soon be pursuing his Ph.D. He also lectures at Mac Div and at Redeemer University College in Ancaster.

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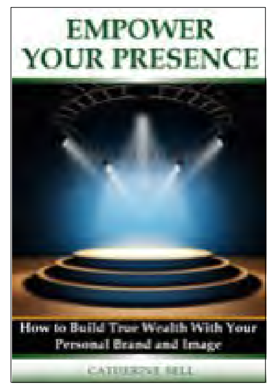
Catherine Bell

Faculty Participation: Author, Workshop Leader
Focus: Image and Etiquette

Catherine Bell is the author of a new book entitled ***Empower Your Presence, How to Build True Wealth with Your Personal Brand and Image***. She is a dynamic international speaker, educator, and President of PRIME Impressions who is frequently quoted in print media and has been an expert image and etiquette source for national television and radio. She is one of only 13 Certified Image Professionals in Canada, an Association of Image Consultants International (AICI) Hall of Fame inductee, and is considered one of the top image experts globally.

Books:



Catherine is a catalyst for success as both businesses and individuals utilize her expertise concerning the ABCs of image – appearance, behaviour and communication. Since opening her image consultancy in 1994, organizations have benefitted from her ability to customize fun, interactive seminars on personal branding, powerful presentations, impression management, business and casual attire, social and business etiquette, working a room, multi-generational communications, and business networking to meet professional development needs.

A former Assistant Director for Business Network International, she is a contributing author to *The New York Times* bestseller, *Masters of Networking*, and her other book, *Managing Your Image Potential: Creating Good Impressions in Business*, is used around the world. A polio survivor, Catherine is on the Board of March of Dimes Canada.

Catherine has been a guest on Canada AM, TV Ontario, CBC Radio, and CBC NewsWorld, and has been frequently featured in *The Globe and Mail*, *The Financial Post, The New York Times, The Las Vegas Review Journal, Canadian Business, More Magazine, Your Workplace, Profit,* and several Sun Media and online publications.

Catherine's workshops are always customized and have included topics such as:

- Brand YOU! Managing Your Personal Brand
- Powerful Presentations
- Business and Social Protocol
- Multi-Generational Communications
- Building Client Relationships

Awards and Recognition:

- AICI's prestigious Award of Excellence in Education
- Ontario Government International Year of Volunteers Award
- Ontario March of Dimes - Reverend Essex Award for Outstanding Volunteering
- Delegate to the United Nations Roundtable on the *Convention for the Rights of Persons with Disabilities*

Diana Bishop

Faculty Participation: Workshop Leader
Focus: Communication

Diana Bishop is the creator of The Success Story Program™ which helps leaders in Business, Politics, Law, Healthcare and Not For Profit organizations shape their identities, raise their profiles and become confident and authentic communicators and specialists in their fields.
In her more than 20 years as a TV news correspondent, Diana Bishop has had a journalism career that has taken her far and wide. As a result, Diana has established an impressive network of global contacts.

She has interviewed presidents and prime ministers, covered major national and international news events and specialized in the internal workings of Canadian politics and foreign policy.

After cutting her teeth with CBC News in Montreal and Quebec City in the 80's, Diana was snapped up by CTV National News in 1989 to become a National Political Correspondent in Ottawa where she filed news and did live reports on the Meech Lake constitutional crisis, the Oka Indian crisis, Commonwealth and Francophone Summits, visits by Russian President Boris Yeltsin, US President George Bush, Queen Elizabeth, Nelson Mandela's first trip abroad, as well as traveled with Prime Minister Brian Mulroney across Canada, the US, France and Africa.

In 1992, Diana was posted as *Beijing Bureau Chief*, making history as CTV's first full-time female foreign correspondent.

In CTV's affiliation with ABC World News Tonight with Peter Jennings, Diana filed more than 100 news reports and current affairs documentaries on Chinese politics, human rights, and China's economic and social revolution, as well as Prime Minister Jean Chretien's first Team Canada business tour in 1994 to Beijing, Shanghai, Hong Kong, Jakarta and Hanoi. Diana's work in China earned her a Gemini nomination in 1995 for best reportage.

Then NBC News came knocking and Diana spent an additional year in China rebuilding the NBC News bureau and running Asia coverage for Nightly News with Tom Brokaw, Weekend Nightly, the Today Show and Meet the Press.

In 1997, Diana returned as a Senior Parliamentary Correspondent first for CTV News in Ottawa where she made regular contributions to W5, Sunday Edition with Mike Duffy and anchored Canada AM Weekend and CTV NewsNet. In 1999, Diana moved to Global Television where she travelled with Jean Chretien to international summits like the G8, as well as covered his 2000 federal re-election campaign.

Diana has also produced several documentaries, and most recently wrote, narrated and produced a one-hour documentary for Global Television entitled A Hero To Me exploring the legacy of her famous grandfather and Canadian icon World War One flying ace Billy Bishop.

Andrew Brash

Faculty Participation: Workshop Leader
Focus: Motivation

Lincoln Hall reached the summit of Mount Everest on a Thursday and was descending with his Russian-led expedition when he reportedly became delirious, a sign of fluid on the brain, and could not be moved. His wife and teenage sons had been told he had died. Hall spent the night alone at an elevation of 8,700 metres, before other climbers including Calgarian Andrew Brash found him the next morning.

Brash was only 200 metres from the summit when he decided to abandon his climb and help the Australian. The rescue of the Australian mountaineer followed a well-publicized and controversial death of another Everest climber, David Sharp of England, who died on the mountain of apparent oxygen deprivation. It was reported that more than 40 fellow mountaineers opted to not assist him despite his situation.

A true inspiration to millions for his simple act of human compassion and moral courage, Andrew Brash's story is about making decisions that matter. . .he gave up his big goal. . .for an even bigger one—the opportunity of being the best person he could be.

Andrew offers the spectacular experience of approaching a big dream and the perspective on what it means to give it all up when something more important suddenly appears and must be dealt with. His personal experience with Mount Everest was truly a triumphant defeat. He is an inspiration for all of us, who face the consequences of decisions that really matter every day, in our life's work and with our friends and family.

David Christianson, BA, R.F.P., FCFP, TEP

Faculty Participation: Author
Focus: Professional Wealth Management

A practicing financial planner since 1982, David is recognized as a pioneer in fee-for-service financial planning and portfolio management in Canada. In 2012, David's team and their clients joined NBF Wealth Management, where they manage all of the financial affairs for a select group of high net worth clients. All compensation is fee-based.

Author of *Managing the Bull – A No-nonsense Approach to Personal Finance,* he was also lead author of both the Code of Professional Ethics and the Professional Standards of Practice for the Institute of Advanced Financial Planners. He has been a Personal Finance columnist in the *Winnipeg Free Press* since 1994, and is the author of The *Structure of the Client Centered Practice* course offered by Knowledge Bureau. David also serves as a beloved Master of Ceremonies at the annual Distinguished Advisor Conference.

He has hosted a radio show, and has been a featured guest on radio and TV countless times. Dave is often sought after for speaking engagements spanning a wide variety of professions and associations, including Advocis, I.A.F.P., STEP, YPO, consumer groups and fund dealers.

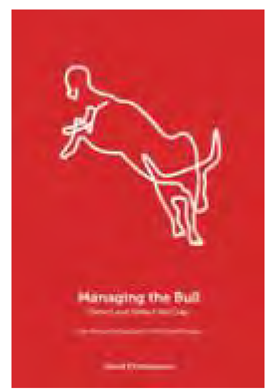
Awards and Recognition:

- Named a *Fellow of the FPSC 2013*, by the Financial Planning Standards Council.
- *Independent Financial Advisor Team of the Year*, STEP Private Client Awards, Society of Trust and Estate Practitioners, London, UK
- *Advisors Edge* - Advisor of the Year, Prairie Region
- Canada 125 *Commemorative Medal* awarded by the Governor General in 1992, in recognition of volunteer leadership and community involvement

Certificate Courses:

- Structure of the Client Centered Practice

Books:



Richard Croft

Faculty Participation: Workshop Leader
Focus: Client Relationship Model

Richard Croft began his career in the financial services industry as a Registered Representative in 1975. Richard is licenced as an investment counselor / portfolio manager, operating under the corporate name R. N. Croft Financial Group Inc. He manages approximately $350 million for private clients.

Richard appears regularly on BNN TV speaking about portfolio management, derivatives and exchange traded funds and authors a regular options column for Investment Executive.

Richard is also a prolific author. His most recent book is a best seller, *Protect Your Nest Egg: A Canadian Guide to Wealth Protection* with Eric Kirzner. He has co-authored numerous other books with Eric Kirzner including; *The Beginners Guide To Investing: A Practical Guide To Putting Your Money To Work For You*, and *The Fundline Advisor: The Essential Mutual Funds Handbook for Canadian Investors*. Richard has also authored *Aggressive Investing; Proven Strategies for Bold Investors and Portfolio Builder; The FundLine Edge*.

Richard provides leading edge perspective, based on both vision and experience in the area of portfolio construction and management leading to total wealth management. He can speak to advisors about current economic drivers that affect investor behavior and provides insight as to the effects such trends on a variety of demographics to both a consumer and professional audience.

He participated as a faculty member of Knowledge Bureau in the Masters Certificate in Investment Planning Program offered in partnership with The Schulich Executive Education Centre. There Richard teaches courses on Modern Portfolio Theory and Financial Literacy and Risk Management through Portfolio Construction. Richard is also a top-rated speaker on economic issues at Knowledge Bureau's Distinguished Advisor Conference.

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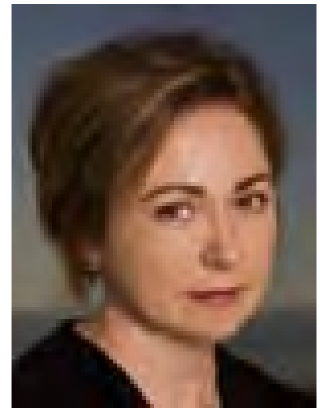
Nicola Elkins, CFRE, M.Sc. Economics

Faculty Participation: Author, Course Instructor
Focus: Strategic Philanthropy



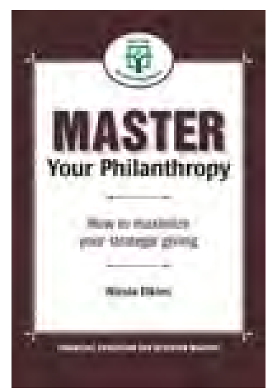
Nicola is the Chief Executive Officer and Founder of BenefAction Foundation, a national charitable Public Foundation which specializes in Planned Giving. BenefAction helps Canadians and their Advisors harness the advantages of strategic giving. It has built a reputation as a valuable resource for investment, legal and tax professionals who want to integrate charitable giving into their client's financial, estate and succession plans.

Prior to starting BenefAction, Nicola spent 20 years in the financial services industry holding a number of senior roles. She has a M.Sc. in Economics from the London School of Economics and a B.A. from McGill University. She is a Certified Fund Raising Executive; a MFA Succession & Estate Planning Specialist; a graduate of the Advanced Canadian Gift Planning Course offered by the Canadian Association of Gift Planners; the author of a book called Master Your Philanthropy and of an online course called Investment Strategies in Charitable Giving. She is also Past President of the Rotary Club of Westmount and a Director of the Le Manoir, a home for independent seniors living in Westmount (QC).

Certificate Courses:

- Investment Strategies in Charitable Giving

Books:

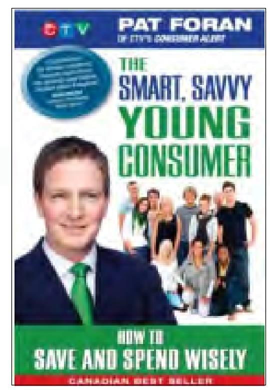


Pat Foran

Faculty Participation: Author
Focus: Financial Literacy

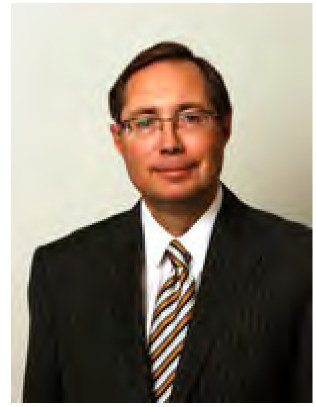
Pat Foran is an award-winning journalist who has worked for 3 different TV affiliates across Canada. He is the host of a popular segment called *Consumer Alert* and his stories are seen on TV stations across the country. Pat has helped consumers recover millions of dollars, exposed scams and passed on countless money saving tips. He works to educate the public on matters of fraud related to door to door sales, the internet, phone scams, home renovations, auto sales, financial matters and countless other issues designed to educate and lead to changes in legislation. He is the author of 4 bestselling Canadian books, the latest being *The Smart, Savvy Young Consumer* – a book designed to help young people become more financially literate. Pat is passionate about financial literacy and served on the Federal Government's Financial Literacy Task Force. He has also donated his time to work with World Vision in Uganda and The Christian Children's Fund of Canada in Nicaragua.

Books:



Larry Frostiak

Faculty Participation: Author
Focus: Corporate Wealth Management



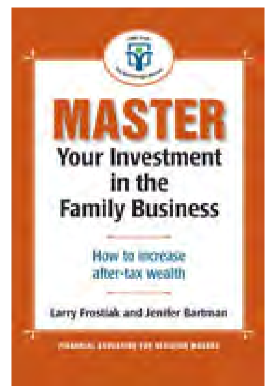
Larry is a founding partner of Frostiak & Leslie Chartered Accountants Inc. The firm focuses primarily on successful privately owned and family controlled businesses and high net worth individuals. Larry provides tax and business advisory services, including trust and estate planning in the overall global wealth management concept.

Larry has an established reputation as a tax specialist – having lectured on trust, estate and corporate business planning topics across Canada for the CA Institute, STEP and Knowledge Bureau as part of the Distinguished Advisor Workshops. He was elected to the worldwide council of STEP and served as worldwide treasurer from 2005-2011 inclusive. He was elected as a member of the Council of the Manitoba Institute of Chartered Accountants (2006-2012), and an elected Board member on the Manitoba Institute of Chartered Accountants Foundation. Larry currently serves as the Chair of the Institute of Manitoba of Chartered Accountants Taxation Committee.

He has authored two books: Taxation of Trusts and Estates – A Practitioner's Guide 2014 / Poyser, Frostiak, Chow, published by Thomson Reuters 2013 and Master Your Investment in the Family Business / Frostiak, Bartman, Published by Knowledge Bureau. He has also led numerous workshops and conferences including STEP Canada, Prairie Provinces Tax Conference, Winnipeg Estate Planning Council, Law Society of Manitoba, Knowledge Bureau's Distinguished Advisor Conference and has instructed at CICA In Depth Tax Courses.

Larry was elected as a Fellow of the Manitoba Institute of Chartered Accountants (September 2005) and received the STEP Volunteer of the Year Award (2005). He is a Past Board member of PTE (Prairie Theatre Exchange), Past Chair of the Federal Finance Committee, Winnipeg Chamber of Commerce, STEP Worldwide Council and University of Winnipeg Foundation tax advisory committee. Larry was just recently awarded the STEP Founder Award for his contributions to the Society.

Books:



Kevin Gebert

Faculty Participation: Author
Focus: Financial Planning

CFP MFA CSWP FMA RPA EPC CPCA RHU FCSI FDS

Knowledge in financial planning is a passion and goal for Kevin Gebert ever since he started as a financial advisor in 1996. Since then he has continued his studies which enables him to pass this knowledge onto others in a simple and effective way to create financial change in people's lives.

Kevin received his Certified Financial Planner designation in 1999 and is President of Greenrock Financial Group Inc. based in Surrey, BC. Kevin also works with clients in Alberta and Ontario.

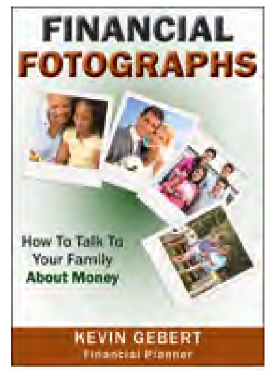
Writing is a hobby for Kevin and he enjoys writing original articles to build financial planning knowledge for clients and others. He has been featured in the *Vancouver Sun*, *National Post*, *Insurance Journal*, *Global and Mail*, and the *Vancouver Province* throughout his career. Kevin has also been featured on the radio in the Lower Mainland and Vancouver Island on CFUN, CKNW and CFAX.

His desire to continue to learn from experts that complement the work he does brought him to Evelyn Jacks and Knowledge Bureau in 2005, where he enrolled in the MFA–Retirement Income Specialist designation program. This enabled him to learn from Evelyn and other experts through a welcomed variety of presentation formats that added to the student studying experience. The scope of the curriculum throughout the courses engaged him as a student and the self-study environment allowed him to still run his financial planning practice.

But it didn't stop there. Kevin went on to become a published author with Knowledge Bureau. *Financial Fotographs – How to Talk to Your Family About Money* provides a fresh approach to family financial literacy and helps parents and grandparents to broach important financial topics, like wills and powers of attorneys, and use a financial plan that works for their unique situation.

Kevin is also a Knowledge Bureau Faculty member, instructing other wealth advisors in their professional development.

Books:



Jim Gray

Faculty Participation: Workshop Leader
Focus: Communication

Jim Gray is an accomplished storyteller who helps his clients throughout North America communicate more effectively with their target audiences.

For more than 15 years, Jim has conducted focused, practical presentation and media skills coaching sessions with hundreds of senior executives, physicians and public figures in Canada and the United States. He has a unique ability to teach others how to cut through the information clutter to create and convey stories that are clear, concise and relevant.

A former journalist with The Toronto Star and the Canadian Broadcasting Corporation, Jim has developed the HOW LEADERS SPEAK presentation skills workshop, a customized seminar for achievers who seek to engage and influence their listeners. Workshop participants are able to improve dramatically as presenters – and communicate like outstanding leaders – through a coaching model that emphasizes rehearsal and feedback.

An expert in crisis communications, Jim frequently provides counsel to organizations facing challenging public and internal issues.
He regularly contributes articles on communicating effectively to The Globe and Mail and speaks frequently on presentation, media and inter-generational issues.

In his HOW LEADERS SPEAK keynote address, Gray reveals the seven powerful keys to speaking like a leader, integrating video clips from great speakers of the past and present to demonstrate the points.

Workshop Topics:

- How Leaders Speak
- Media Skills
- Crisis Communication Skills

Keynotes:

- How Leaders Speak
- The Generation Trap
- The Power of the Story
- Media Matters
- Communicating in a Crisis

Walter Harder

Faculty Participation: Course Instructor, Workshop Leader
Focus: Personal Tax

Walter Harder is a key member of the Knowledge Bureau Faculty as both a course author/instructor and speaker at the Distinguished Advisor Workshops. Walter leads the Personal Tax practice at Knowledge Bureau and is responsible for the annual updating of all personal tax courses.

Walter started his career as a high school teacher, but once he discovered the world of income tax, he left high school teaching to join one of Canada's largest income tax firms, H & R Block. Walter was soon conducting management training for managers across the country.

In 1995, Walter joined CANTAX leading a development team to create the first Windows versions of the software and add innovative tax planning functionality. In this capacity, Walter toured Canada each fall presenting an update on income tax and software features to professional customers coast to coast, and so is well known to professional tax practitioners nationally.

He is currently President of Walter Harder and Associates, specializing in tax research, and business building tool development. Walter leads tax research and web tools development for Knowledge Bureau.

Certificate Courses:

- T1 Professional Tax Preparation – Basic
- T1 Professional Tax Preparation – Advanced
- T1 Professional Tax Preparation – Proprietorships
- Tax Strategies for Financial Advisors
- Final Returns on Death of a Taxpayer

Knowledge Bureau®
Excellence in Financial Education

Robert Ironside

Faculty Participation: Author, Course Instructor
Focus: Financial Literacy

Robert is currently a finance Professor at Kwantlen Polytechnic University, located in Surrey, BC.

Prior to returning to the academic world in 2005, Robert spent a number of years in the corporate sector. He was President and CEO of Learning Dividends, a private eLearning company dedicated to taking the teaching of finance to the internet. He was previously a corporate account manager for two of Canada's largest banks, a contract administrator for an international manufacturing company and VP Corporate Development for a Toronto Stock Exchange listed public oil company.

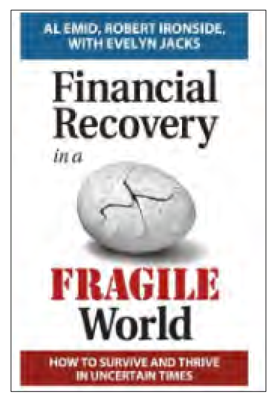
Robert has been a life-long entrepreneur. He was the primary force behind developing the concept that went public on the Toronto Stock Exchange as Trilogy Resource Corporation. He was a co-founder and Director of Primeline Capital Corp., an Alberta Stock Exchange listed Junior Capital Pool Corporation.

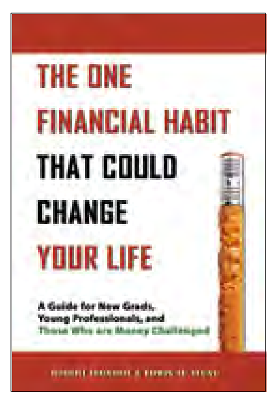
Robert has taught and consulted in over twenty countries around the world. He is widely recognized for his exceptional teaching abilities – he has won six teaching awards in three different universities, teaching both graduate and undergraduate students.

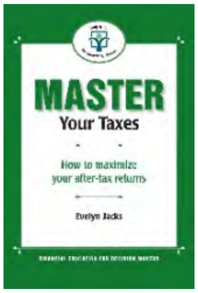
Certificate Courses:

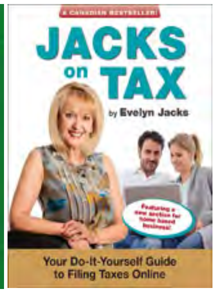
- Financial Literacy: Assessing Risk and Return
- Portfolio Construction for Real Wealth Managers

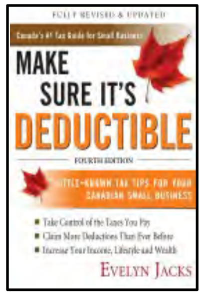
Books:











Evelyn Jacks

Faculty Participation: Author, Course Instructor, Workshop Leader
Books: Essential Tax Facts, Financial Recovery in a Fragile World (co-author), Jacks on Tax, Make Sure It's Deductible, Master Your Taxes
Certificate Courses: Accounting for Business Transitions, Advanced Bookkeeping for Multiple Businesses, Tax Strategies for Financial Advisors, T1 Professional Tax Preparation – Basic, T1 Professional Tax Preparation – Advanced, T1 Professional Tax Preparation – Proprietorships, T2 Corporate Tax Preparation – Basic, Advanced Tax-Efficient Retirement Income Planning, Advanced Payroll, Basic Bookkeeping for Small Businesses, Elements of Real Wealth Management
Focus: Tax and Wealth Management

Evelyn is the best-selling author of 51 books on personal tax and wealth management, a multiple-award-winning entrepreneur and the Founder and President of the Knowledge Bureau, Canada's leading national post-secondary educational institute focused on professional development in the tax and financial services industry. Knowledge Bureau is also a leading publisher of financial books and e-books.

Evelyn was recently named one of the Top 25 Women of Influence in Canada for the second time. She has also been appointed the 77th President of the Manitoba Club this year, Western Canada's oldest private business networking club.

Evelyn was appointed by Finance Minister Flaherty to the Federal Task Force on Financial Literacy, and by the Premier of Manitoba to the Lower Tax Commission to advise on the direction of the provincial tax regime.

Evelyn has recently co-founded the Manitoba Financial Literacy Forum in partnership with the Manitoba Securities Commission to increase financial literacy in the province of Manitoba, and lends her expertise to numerous public and private boards.

Evelyn is a highly respected and influential news commentator and analyst. She has written thousands of articles for numerous publications, most recently in MoneySense Magazine, the Toronto Star and for the Toronto Stock Exchange. She also appears regularly on CBC Newsworld, CTV News, BNN and regional television and radio outlets. She is the managing editor of Knowledge Bureau Report, which delivers weekly e-news to 21,000 tax and financial advisors throughout Canada.

Evelyn has been awarded the prestigious *Rotman School of Business Canadian Woman Entrepreneur of the Year Award*. She was also recognized internationally with a *Business Leadership Award* by the Canadian Embassy in Washington, D.C. and named an Inspiring Woman by the Winnipeg Free Press. She has twice been recognized as Manitoba's Woman Entrepreneur of the Year. She has also received the YM-YWCA "Business Woman of the Year" award.

Jill H. McAlpine, FCPA/FCA, TEP

Faculty Participation: Workshop Leader
Focus: Philanthropy

Jill is an independent consultant with a breadth of experience in providing individuals, families, corporations and not-for-profits with community investment advice related to strategy, structure, governance, innovation, stakeholder engagement and other organizational and operational matters. She assists clients in developing and implementing strategies that align with their personal, financial, business and community objectives, fit their operating style and create significant community benefit. Jill is an experienced presenter, a skilled facilitator and a strong advocate for the not-for-profit sector with experience leading and participating in processes that engage diverse stakeholders in respectful outcomes-focused dialogue to advance understanding of and action on community, organizational and sector challenges, opportunities and solutions. She is passionate about and deeply committed to enhancing the quality of life locally, nationally and internationally through building the capacity and effectiveness of the charitable sector and sector organizations.

Jill has been instrumental in the evolution of the PricewaterhouseCoopers Canada Foundation, a leader in corporate community investment. She was a founding member of the Foundation and is a member of the Advisory Board, consultant advising principally in the areas of strategy, governance, strategic initiatives and evaluation, and co-designer and co-author of the Foundation's strategic framework and thought leadership initiatives – the Volunteer Continuum, the Capacity Building Roundtable Project and Capacity Building: Investing in not-for-profit effectiveness.

Jill is an active volunteer. She is a founding member and co-chair of the Institute at Havergal College – a semi-autonomous body that provides real life, hands on experiences to complement Havergal's academic program thereby enabling students to deepen their learning and develop skills in leadership, innovation, collaboration, and relationship and risk management. Jill is a member of Imagine Canada's Advisory Council, Canada Revenue Agency Charities Directorate's Technical Issues Working Group, the executive of the Charities and Not-for-Profit Law Section of the Ontario Bar Association, and the Leadership Council of the Association of Corporate Grantmakers. Jill's past board roles include Havergal College, Community Foundations of Canada and Toronto Community Foundation.

Jill is a member of the Chartered Professional Accountants of Ontario (formerly the Institute of Chartered Accountants of Ontario) and received her Fellowship designation (FCPA/FCA) in recognition of her significant contribution to the charitable sector and the profession. Jill is also a member of STEP: the Society of Trust and Estate Practitioners (professional designation – TEP).

Gordon Pape

Faculty Participation: Workshop Leader
Focus: Personal Finance and Investing

Gordon Pape is a well-known Canadian author who specializes in personal finance and investing. He is a frequent guest on national television and radio phone-in shows, and is often quoted in the media. He is also a top-rated speaker at Knowledge Bureau's Distinguished Advisor Conference.

He is Editor and Publisher of three newsletters: the *Internet Wealth Builder*, a weekly e-mail investment advisory; *The Income Investor*, a bi-monthly report on income securities; and *The Canada Report*, a monthly newsletter for U.S. residents who want to invest in Canada.

Mr. Pape is a regular contributor to GlobeinvestorGold.com, 50-plus.net, *Zoomer* magazine, the *Toronto Star*, and *Insurance Journal*.

In the investing field, Gordon Pape has written and co-authored many books, with total sales in Canada and the U.S. exceeding one million copies. His newest book, published by Penguin Canada, is titled *Retirement's Harsh New Realities: Protecting Your Money in a Changing World*.

Mr. Pape has had a long and distinguished career. He was a political analyst in Quebec City and Ottawa for The Gazette of Montreal for several years and spent three years in London, England as bureau chief for the Southam Newspapers, an assignment which included Northern Ireland, the Middle East and Africa. He was publisher of Canada's largest circulation magazine, *The Canadian Magazine*, and its successor, *Today Magazine*, from 1977-82. From 1984-87, he was publisher of *The MoneyLetter* and *The TaxLetter for Hume Publishing*. He also supervised a major revision of Hume's *Successful Investing and Money Management course.*

For 17 years his insightful financial commentaries were heard weekly on CBC radio stations across Canada, attracting tens of thousands of listeners.

Mr. Pape has been a featured speaker at several national and international financial conferences in Canada and the United States. For several years he represented Canada at the World Money Show in Orlando, Florida, which is attended by more than 8,000 people. He has lectured at Queen's University, Simon Fraser University, and the Canadian Bar Association.

Mr. Pape was the lead member of the team of three reporters that won the Roland Michener Award for Public Service Journalism for The Gazette in 1974. He received a Heritage Canada Communications award for a book he co-authored based on The Gazette series titled *Montreal at the Crossroads*.

John E.S. Poyser

Faculty Participation: Course Instructor, Workshop Leader
Focus: Trust and Estate Planning

John Poyser is a partner with the Winnipeg Law firm Tradition Law LLP Estates and Trusts and with the Wealth and Estate Law Group, a boutique law firm in Calgary.

His practice is limited to estate planning and estate litigation support, serving clients in Alberta, Manitoba and Ontario. The mainstays of his practice include strategies to reduce Canadian income tax, provincial probate tax, and U.S. estate tax, as well as planning for disabled heirs and in blended family situations. He helps families protect wealth against mistakes in judgment, marital breakdown, and creditors. He also provides advice to litigants and their lawyers during capacity and will disputes and conducts estate litigation.

Nationally, he is a past chair of the Wills, Estates and Trusts Section of the Canadian Bar Association (the "CBA"), and is past Deputy Chair of the Canadian Branch of the Society of Estate and Trust Practitioners ("STEP"). Provincially, he is a past chair of the Wills and Estates Section of the Manitoba Bar Association, and a past chair of the Winnipeg Chapter of STEP. Internationally, he currently serves on the STEP Worldwide Council.

He coauthors a text book for Carswell, entitled *The Taxation of Trusts, a Practitioner's Guide*, currently in its eighth edition, helping accountants and lawyers in Canada deal with the taxation and planning issues. He has also authored a second text book for Carswell, entitled *Capacity and Undue Influence*.

He is the former editor-in-chief of The National Concordance, a compilation of succession and capacity laws across Canada jointly published on-line by the CBA and Westlaw ECarswell. He currently serves as an associate editor of The Estates and Trusts Reports, a national case law reporting service for lawyers and judges. He is also a regular contributor to the Estates, Trusts, and Pensions Journal.

Certificate Courses:

- Final Returns on Death of a Taxpayer
- Use of Trusts in Tax and Estate Planning

Workshops:

- Cottage Succession Planning
- Attorney School

Angela Preteau

Faculty Participation: Author, Course Instructor, Workshop Leader
Focus: Cross Border Taxation

Angela graduated from the University of Manitoba in February of 2001 with a Bachelor of Commerce Honours Degree (accounting major). Angela challenged and successfully passed examinations (under the CICA-CPA reciprocity provisions) to attain her CPA designation in November 2007.

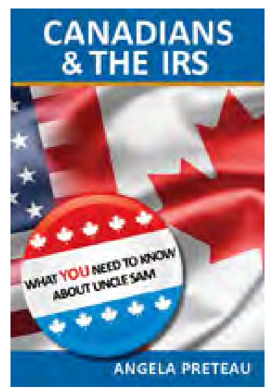
Angela Preteau is a CA as well as a CPA, licensed in North Dakota. She is a senior manager at Frostiak & Leslie Chartered Accountants and is the resident US tax professional in her office, one of the only tax professionals in the province that deals with US as well as Canadian income tax issues, with a high concentration on cross-border taxation.

Angela has been involved in many tax seminars and has presented on various topics regarding cross-border taxation relating to Canadians living in the US and owning property in the US as well as US citizens living and working in Canada. Angela received a nomination for the CICA Early Achievement award. She has also been a top-rated speaker at Knowledge Bureau's Distinguished Advisor Conference and Distinguished Advisor Workshops.

Certificate Courses:

- Cross Border Taxation

Books:



Alan Rowell

Faculty Participation: Course Instructor, Workshop Leader
Focus: Tax Planning

Alan Rowell, President and Tax Specialist of The Accounting Place, specializes in working with individuals and small to medium size businesses by providing accounting and taxation services that are unique to each client. With 30 years' experience, Alan has developed a unique ability to translate taxation language into plain English and does not hesitate to dig deeper and ask for clarification and interpretations from the various Provincial Ministries of Finance and Canada Revenue Agency. He is the Lead of Knowledge Bureau's Fast Track program for those experienced professionals looking to demonstrate their existing expertise toward a Knowledge Bureau designation, and is also a workshop leader at the Distinguished Advisor Workshops.

His achievements include the DFA, Tax Services Specialist and MFA designations, and he is recognized as one of the leading tax services specialists in Canada. He is a tax resource for a number of Financial Planners and a Strategic Educational Partner with the Knowledge Bureau. Since 1998, when Alan formed The Accounting Place, he has saved small business owners literally hundreds of thousands of dollars in income taxes through his savvy interpretations of the tax laws and his ability to help individuals and business owner's structure, operate and organize their financial affairs to their best overall advantage.

As founder and lead sponsor of Reboot Your Business, Tax Freedom Day educational seminar for small to medium size business, Alan believes in the educational and information process.

As the local tax specialist in Greater Hamilton, Alan is often a resource for the Hamilton Spectator, CHCH-TV and many of the local radio stations. He is also a regular monthly contributor to the BusinessLink newspaper, TaxLetter and MoneyLetter publications. Alan has also been featured in the National Post and Financial Post as well as a tax specialist resource for the Globe and Mail.

Participation and presentation of the Tax Consequences of Debt Management in conjunction with the Knowledge Bureau's January 2009 Line-by-line Tax update provided the opportunity to meet with financial specialists across the country and discuss the various aspects of taxation affecting everyone.

Alan has been a past recipient of both the Hamilton Community Newspapers Reader's Choice Awards and the Hamilton Spectator Newspaper Reader's Choice Awards for his coverage of accounting and taxation matters.

Courses:

- T2 Corporate Tax Preparation for Micro Businesses

Workshops:

- Audit Defence Bootcamp

Jim Ruta

Faculty Participation: Author, Workshop Leader
Focus: Personal and Professional Effectiveness

Jim Ruta is a veteran financial industry consultant, speaker, writer and media commentator. His "Ruta's Rules" videos on *Investment Executive* TV, "Corner Office Advice" column in *Insurance and Investment Journal* and AdvisorCRAFT membership advisor coaching program have made him one of Canada's top advisor practice management and financial distribution experts. He is Managing Partner of Boston-based InforcePRO Software, a unique presentation and priority generator for life insurance agents.

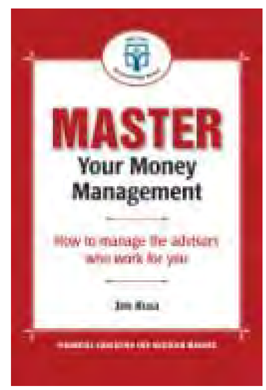
Starting at age 22 in Winnipeg, Manitoba, Jim led one of Canada's largest insurance agencies on Bay Street in Toronto by age 40. He has been coaching, speaking and writing since 1999.

Jim is "The Re-Energizer". Known for his high energy, passionate presentations, he speaks to tens of thousands of advisors around the world at premier advisor events including the Million Dollar Round Table Main Platform. No one can rally a room like Jim. He has several best-selling books to his credit and continues to write for popular advisor publications. He has been a faculty member of Knowledge Bureau since 2006.

Jim appears in national media in Canada regularly including CTV, CTV News Channel, BNN, Money magazine and VoiceAmerica.com where he is sought for his opinion on client-advisor issues. He is a founding partner and Emcee of the annual Canada Sales Congress in Toronto – one of the largest one-day events of its kind in the world.

Jim and his family live in Burlington, Ontario. He has a Private Pilot's license and is an avid golfer when his schedule permits. But, usually you'll find him enjoying time with his family. He is on the board of directors of two large Catholic Charities and is very involved in his church.

Books:



Ron Thiessen

Faculty Participation: Workshop Leader
Focus: Human Resources

Ron Thiessen is a psychologist, corporate consultant, speaker and professor who has more than 20 years' experience in personal growth coaching and group facilitation. His understanding of human dynamics, interpersonal communication and managing change has made him popular as a conference speaker, workshop facilitator, seminar instructor and university professor. He has been referred to as an "inspirational evolutionist". His thought-provoking and practical approach to difficult problems of human communication and interaction, along with wisdom principles of life gleaned from experience, has enabled him to connect effectively with people wherever he goes.

Ron has operated his own business most of his life, and has dealt with many of the challenges and frustrations of managing employees and managers. He has taken these experiences in the field as the fuel for his effective business coaching strategies with hands-on, practical solutions for tough problems. He has coached managers and entrepreneurs across North America with seminars, training sessions, strategic planning and coaching by phone. His sensible solutions will galvanize you to take a fresh look at your situation and apply "out-of-the-box" thinking to effect positive change.

Ron Thiessen
Psychologist/Corporate Consultant
514.592.9991
www.RonThiessen.com

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