

LEARN MORE ABOUT



Our Mission is to Raise Standards  
In Continuing Professional Development In  
The Tax and Financial Services

Evelyn Jacks, President

204-953-4764 direct

204-782-0180 cell

[evelyn@knowledgebureau.com](mailto:evelyn@knowledgebureau.com)

Executive Assistant

Barbara McRae

[barbara@knowledgebureau.com](mailto:barbara@knowledgebureau.com)

## ABOUT KNOWLEDGE BUREAU

Knowledge Bureau™ is Canada's leading national post-secondary educational institute for continuing professional development in the tax and financial services. It is focused on providing the highest standards in knowledge and skills required to navigate a rapidly changing environment in the tax and financial services in real time, online and anytime.

Founded in 2003 by bestselling tax author and internationally acclaimed educational entrepreneur, *Evelyn Jacks*, Knowledge Bureau publishes and delivers 25 online certificate courses leading to continuing education certification and occupational skills diplomas. It is the home of the *MFA™ (Master Financial Advisor) designation*, which signifies specialization in retirement, business, and succession/estate planning in wealth advisory practices, as well as the *DFA-Tax Services Specialist™* and *DFA-Bookkeeping Services Specialist™* designations for professionals in the tax accounting services.

Knowledge Bureau hosts regional workshops and in-class events in major centres across Canada, taught by industry leaders in a blended learning opportunity with its online courses, and an annual international event, the *Distinguished Advisor Conference™*, which explores strategic wealth management for retirement in locales clients retire to.

It also partners with corporate clients and academic institutions, custom-designing CE modules, webinars, and keynotes to meet organizational needs.

Finally, Knowledge Bureau is a national publisher of the *Knowledge Bureau Network of Newsbooks and Reports*, which provide financial literacy opportunities for Canadians and their advisors through highly interactive news information and educational experiences. For more information on CE Accreditation, Standards of Conduct and programming, contact Knowledge Bureau at 1-866-953-4769 or visit [www.knowledgebureau.com](http://www.knowledgebureau.com).

### **Enrolment Statistics as of January 2015:**

over 200,000	Online course module registrations leading to CE/CPD Credits
over 8,000	Knowledge Bureau Report subscribers, published weekly
over 16,000	Technical Training Certificates granted
over 7,000	Active Certificate Course Students in Diploma and Designation path
over 1,200	Distinguished Financial Advisor™ and Master Financial Advisor™ Designation Program students
over 6,500	Distinguished Advisor Workshop & Distinguished Advisor Conference Attendees



## ABOUT EVELYN JACKS

### Founder & President, Knowledge Bureau

**Evelyn is Canada's most respected educator in tax and financial literacy and one of Canada's most prolific financial authors.** She has penned 51 best-selling books on tax preparation and tax efficient family wealth management. She was recently named one of the Top 25 Women of Influence in Canada for the second time.

**Evelyn is also the Founder and President of [Knowledge Bureau](#),** Canada's leading national post-secondary educational institute for continuing professional development in the tax and financial services. Knowledge Bureau is the publisher of certificate courses leading to the prestigious [MFA™ \(Master Financial Advisor\)](#) and [DFA-Tax and Bookkeeping Services Specialist](#) Designations, which provide core specialization opportunities in tax, retirement, business succession and estate planning for multi-disciplinary practices.

**Evelyn has been influential in advising governments** on tax and financial literacy policies. She was appointed by former 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. Recently she has co-founded the Manitoba Financial Literacy Forum in partnership with the Manitoba Securities Commission, dedicated to increase financial literacy in that province.

**She is also a well-known national commentator,** keynote speaker and budget analyst who has written thousands of articles, 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 tweets @evelynjacks.

**Evelyn has been a role model for women in business.** Evelyn is the immediate past President of the Manitoba Club, Western Canada's oldest private business club. She was awarded the prestigious Rotman School of Business Canadian Woman Entrepreneur of the Year Award. She has also been 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.

## **ABOUT KNOWLEDGE BUREAU'S ONLINE CERTIFICATE COURSES**

Knowledge Bureau's extensive and comprehensive curriculum provides an academic path to continuing professional development for advisors in practice in the tax and financial services, and their teams. It provides an opportunity to specialize within a common theme of Real Wealth Management – the Accumulation, Growth, Preservation and Transition of Family Wealth, with Sustainability – after taxes, inflation and fees. To participate, the following pre-requisites must be met:

**Certificate Courses/Workshops (CE):** Grade 12 or equivalent level education

**Career Enhancement Diploma and Designation:** Graduation from one Knowledge Bureau Certificate course or

1. existing employment or entrepreneurship within the tax, accounting, bookkeeping or financial services with existing certification, designation, or license in the industry sector and/or
2. at least three years' experience in the industry sector

**Continuing Professional Development:** Several workshop, conference, certificate course or designation options are available to help grads meet the requirement to receive 12 ongoing continuing professional development hours each year.

The curriculum is divided into six areas of specialization under two designation programs – the Distinguished Financial Advisor and Master Financial Advisor Programs.

### **Distinguished Financial Advisor Designation Program:**

- Tax Services Specialist
- Bookkeeping Services Specialist

### **Master Financial Advisor Designation Program**

- Business Services Specialist
- Real Wealth Management Specialist
- Retirement Income Specialist
- Succession & Estate Planning Specialist

*"In an ever changing financial environment, our distinct knowledge in taxes as Distinguished Financial Advisors puts us in a special place among the crowd."* **Andre Yong Tit Kow, DFA - Tax Services Specialist**

*"The training & insights have vastly expanded the level of services I now confidently provide. The Knowledge Bureau's toolbox simplifies the complex, allowing deeper, more meaningful conversations with clients."* **Rick Tomalty CFP, CLU, CH.F.C., CHS, MFA - MFA-Succession & Estate Planning Specialist**

## ABOUT THE DISTINGUISHED ADVISOR WORKSHOPS

### Instructor-led Workshops: Learn, Network, Earn CE Credits, Designations

To help tax and financial advisors stay up to date on the most critical ongoing professional development issues in these industries, Knowledge Bureau offers three day-long regional certificate workshops, three times a year in four cities: Toronto, Winnipeg, Calgary and Vancouver. Topics are seasonally-appropriate for the industries and provide outstanding Continuing Education and networking opportunities for new and potential students, active students and graduates of the Knowledge Bureau designation programs as well.

This “Blended Learning” environment also offers a way for students in our online programs to bring their studies to life, learning their course topics in more depth with highly qualified instructors who are experienced industry experts and in classrooms filled with their peers and potential mentors from coast-to-coast. It’s an outstanding opportunity to raise the bar professionally and build business opportunities.

**January**                      **Professional Personal Tax Update for Advisors**

**June**                              **Comprehensive Federal/Provincial Budget & Estate Planning Update**

**October**                      **Family Business and Year End Tax Planning**

<p><i>"A firehose of information!"</i></p> <p><i>"Will definitely help me add value to my clients"</i></p> <p><i>"Very practical information "</i></p>	<p><b>Engage your whole team</b></p>  <p><b>2015 Workshops</b></p>	<p><i>"I love the tools that are available from Knowledge Bureau"</i></p> <p><i>"Interactive and vibrant"</i></p> <p><i>"Most excellent"</i></p>
--	--	--

*"We close the office so everyone can attend. "* Brenda A., Tax and Accounting Services

*"I have recommended (these workshops) to my colleagues... more cutting edge and offers me better knowledge opportunities."* Brad C., Financial Services

## **ABOUT THE DAC**

The Distinguished Advisor Conference, November 8 – 11, 2015 is Canada's pre-eminent educational event for wealth advisors in the tax and financial services. It addresses today's main business issues from an academic perspective; reflecting on the outcomes of change in private sector forecasting, domestic and international tax law and economic policy making, as well as the regulations that affect the work of financial professionals.

What's revealed at DAC are the strategic and practical business applications that are required to steward family wealth by pre-eminent thought leaders. Throughout times of great change, we have been proud to build the best brand in financial services conferences – Knowledge Bureau's Distinguished Advisor Conference!

This year's theme, *Multi Generation Planning: Growing New Wealth and Relationships in a Digital World* resonates with opportunities and challenges that our distinguished speakers will illuminate to an audience that is like no other: these delegates represent multiple disciplines from across the tax and financial services. Most possess multiple designations, licenses and the experience working with and in top advisory practices.

We hope you will join us to contribute to the national dialogue on critical matters of interest to the advisors and firms present at the event. This is a high profile event with a significant national marketing footprint. Experts and visionaries from all sides of the tax, accounting & financial services including noted senior industry leaders have participated. We invite you to review last year's agenda, attached, for a look at the "who's who".

### **WORDS FROM OUR CLIENTS:**

*Great format, great locations, great content... and perhaps most importantly great people. Year after year the DAC conference continues to be one of the highlights on our calendar. Bravo!"*

Todd Hynes, Vice-President Sales, Transamerica

*"This conference is top notch, not only providing timely and relevant information, but motivated and dynamic speakers. If you're looking to top grade yourself or your staff I highly recommend both the Distinguished Advisor Conference and the courses. . . offered through the Knowledge Bureau."*

Susan L. Misner, B.A. (Econ), goldengirlfinance.com

*"All three days were great!"* Ellie Jenner, Investor's Group