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## Your MFA-Specialist™

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An MFA-Business, Retirement or Estate and Succession Planning Specialist™ works on your behalf to manage long term risk to your family's net worth by helping you to:

- > Manage debt, monitor debt-to-entry ratios and build sustainable family wealth;
- > Interpret the results on your Net Worth Statements. Is the bottom line of your family's wealth growing every year?
- > Oversee and structure the tax, investment, retirement, succession, and business plans that secure your retirement and your legacy, including the community giving you may put into place;
- > Analyze all forms of capital including human, financial, and non-financial for improvement to your plan.

*With broad technical and practical knowledge, your highly qualify Distinguished Master Financial Advisor adds a new value proposition to your professional financial team - or assembles one for you for the best results.*

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## MAXIMIZE YOUR FINANCIAL WELL-BEING

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### Choose a Knowledgeable Professional with your Best Interests in Mind.

No matter how much money you have to work with, you can benefit from the expertise you get from a Distinguished Master Financial Advisor™.



*Below you'll find the name and contact information of your nearest Distinguished Master Financial Advisor.*

For more information about MFA and DFA-Specialist™ qualifications, visit [www.knowledgebureau.com](http://www.knowledgebureau.com) or call 1-866-953-4769



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# TRUST YOUR FINANCIAL FUTURE TO

## A Distinguished Master Financial Advisor



### YOUR BEST INTERESTS IN MIND

*Financial Decision-Making is Complicated. We Can Help You Make Sound Decisions.*

# FIND THE BEST HELP FOR YOUR FINANCIAL HEALTH

## What Should You Look for in a Professional Advisor?

Make sure you work with a **Distinguished Master Financial Advisor**.

The **MFA™** or **DFA-Specialist™** designations signify your advisor:

- > follows the strategic process of Real Wealth Management™ so you get measurable, tax-efficient financial results;
- > is skilled in working with multiple generations in your family;
- > can assemble and manage a team of financial specialists, if required;
- > adheres to a high standard of conduct for transparency and accountability;
- > is knowledgeable and committed to ongoing professional development so you benefit from the most current changes in tax and financial compliance.



## What Can The MFA™ or DFA-Specialist™ Do For You?

Your Distinguished Master Financial Advisor will work with you in four areas of wealth management: to **accumulate** your pre-tax wealth, **grow** and **preserve** your after-tax wealth, and help you **transition** into retirement and beyond. The role is three-fold:

- > **Educate** and keep you informed so that you can feel comfortable asking the most basic questions, be confident in the answers and the decisions you make together;
- > **Advocate** on your behalf so that you can trust that your advisory team is looking out for the very best solutions for you and your family today and in times of transition, incapacity or through challenges like stock market volatility or a tax audit;
- > **Steward your Sustainable Wealth** – today and tomorrow – by helping you minimize taxes and fees while managing risk of wealth erosion from inflation and other economic events;
- > **Understand your financial triggers** – the life, financial and economic events that require decision-making -- and provide sound solutions;
- > **Strategize on a long term plan** - to get the most from your money by reducing your personal and corporate taxes, thereby finding new dollars for investment purposes so you can better plan for important life events like retirement, business succession and estate planning.
- > **Follow a clear process** so that you can consolidate inter-generational wealth and meet regularly to execute on your plan;
- > **Help you manage your risk** and enjoy true wealth, which comes with peace of mind about your financial affairs.



## Your DFA-Specialist™

Count on your **DFA-Tax or Bookkeeping Specialist™** to give you peace of mind in dealing with the **Canada Revenue Agency**. From meticulous books and remittances throughout the year to accurate personal and corporate tax returns, these professionals manage your **CRA compliance risk and work with you to enable:**

- > measurable results with reductions in personal and corporate taxation;
- > increased real dollars, before tax, available for investment purposes;
- > increased after-tax values of income and accumulated capital.