ABOUT US

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

Contents

ABOUT KNOWLEDGE BUREAU

Boiler Plate:

Knowledge Bureau is a national post-secondary education institute and publisher, which provides an academic path to continuing professional development of tax specialists and financial professionals. Our comprehensive certificate courses assist with the attainment of professional credentials, ongoing CE/CPD credits, staff training or the advancement of professional careers through the mastery of specialized knowledge and skills, as demonstrated with the attainment of the Distinguished Financial Advisor™ , RWM™ (Real Wealth Manager), or MFA™ (Master Financial Advisor) Designations, and/or the Executive Business Builder Certification Program™.

For more information see http://www.knowledgebureau.com/index.php/about-us

Our History & Philosophy. Established in 2003, Knowledge Bureau™ has been offering specialized training required by practicing tax and financial professionals, leading to industry certification, diplomas and designations. These credentials focus on building the deep knowledge and broad skillsets required firms and their employees and subcontractors to meet the fast pace of change in their industries. Focused on a philosophy of sustainability of human and financial capital, the Real Wealth Manager™ of tomorrow is a forward-thinking, client-centric business leader.

Our programs are designed to supplement industry licensing requirements and existing degrees and designations in a lifelong learning model, of particular interest to independent business owners and managers.

Our Unique Value Proposition to Our Students: We provide an academic path to required continuing professional development to enable professionals to raise standards of service to their clients and provide *invaluable advice* in a leadership in their community. At Knowledge Bureau, we believe that knowledge is exponentially more valuable when it is shared to improve our collective financial futures.

For these reasons, a Knowledge Bureau student will demonstrate deeper technical knowledge and confident practice management skills that enable a better collaboration with all the stakeholders to a sustainable family wealth plan. Students will be better equipped to participate in a strategic plan all stakeholders subscribe to, by learning in an educational framework we call Real Wealth Management™: the accumulation, growth, preservation and transition of wealth after taxes, inflation and fees.

Our Curriculum: Knowledge Bureau publishes and delivers comprehensive online courses leading to certification, diplomas and designation. We are the home of the *RWM™ (The Real Wealth Manager)* program, *MFA™ (Master Financial Advisor) designation*, which signifies specialization in business, retirement, succession and estate planning, as well as the *DFA-Tax Services Specialist™* and *DFA-Bookkeeping Services Specialist™* designations for professionals in the tax accounting services. The programs are available 24/7 and curriculum can be customized for specific firm requirements.

Knowledge Bureau also offers *CE Summits*, held in major centres across Canada. These day long workshops offer ongoing CE/CPD opportunities, taught by industry leaders in a "blended learning" framework: you can meet your online course instructors and industry experts, ask questions and network with your peers to supplement your online training.

For more experienced members of your team, Knowledge Bureau provides the opportunity to think strategically about wealth management trends, leadership and mentorship at an annual international event, the *Distinguished Advisor Conference™*, which takes Canadian advisors from across Canada to places their clients go to retire.

Finally, *Executive Business Builder Program* built to help business owner-managers acquire the skills to advance the growth of their business equity with strategic business skills. We also partner with national corporate clients and academic institutions, custom-designing CE modules, webinars, and keynotes to meet specific organizational goals in financial education.

Finally, Knowledge Bureau is a national publisher of the *Knowledge Bureau Network of Newsbooks*, *Reports* and *Video Tutorials* which are designed to empower the relationship between advisors and their clients. The goal is to hone a three-part role for advisors - *Educator, Advocate and Steward* - through highly interactive educational experiences with clients. For more information on CE Accreditation, Standards of Conduct and programming, contact Knowledge Bureau at 1-866-953-4769 and explore *www.knowledgebureau.com*.

ABOUT EVELYN JACKS

Evelyn Jacks

As Founder and President of Knowledge Bureau, I am excited about our potential to become your educational home for continuing professional development in the tax and financial services. Our extensive curriculum includes comprehensive online courses, and regional workshops and conferences for a "blended learning" solution that busy professionals and business leaders find effective for lifelong learning and staff training. But it's our personal touch that really matters: our friendly, highly qualified educational consultants and expert instructors will make all the difference. We are ready to help you make the best educational decisions for your time and money.

LEADING OUR TEAM

Evelyn Jacks is Canada's most respected educator in tax and financial literacy and one of Canada's most prolific financial authors. She has penned 53 books for consumers on tax and wealth management, many of them best-sellers, including her most recent, *New Essential Tax Facts, How to Make the Right Tax Moves and Be Audit-Proof, Too* and *Family Tax Essentials, How to Build a Wealth Purpose with a Tax Strategy*. She has twice been named one of the Top 25 Women of Influence in Canada.

Evelyn is also the Founder and President of Knowledge Bureau, Canada's leading national post-secondary educational institute for professional development in the tax and financial services. It is the publisher of over three dozen professional certificate courses leading to the prestigious RWM™ (Real Wealth Manager), *MFA™ (Master Financial Advisor) and DFA-Tax and Bookkeeping Services Specialist* Designations and the new Executive Business Builder Program.

Knowledge Bureau is celebrating its 15th year, having grown to become Canada's only private educational institute to provide career training with specialization in tax, retirement, business building and succession as well as estate planning. It has trained tens of thousands of advisors and communicates with close to 20,000 weekly. It is also a training partner to top national firms engaged in building sales forces and small business scaling activities.

Evelyn has been influential in advising and commenting on tax and financial literacy policies. She was appointed by former Finance Minister Jim Flaherty to the Federal Task Force on Financial Literacy, and by the former Premier of Manitoba, Gary Filmon, 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*, and for the Toronto Stock Exchange. Throughout her career, Evelyn has spent countless hours volunteering her time on news, talk shows and chat lines from coast-to-coast explaining rights and opportunities in filing tax returns to millions of Canadians. She tweets @evelynjacks.

A leader in the business community, she is a 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 and was recognized internationally with a Business Leadership Award by the Canadian Embassy in Washington, D.C. 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 STUDENTS:

7 Key Reasons why they continue their professional development with Knowledge Bureau

Today's professional tax and financial advisors work within a changing environment. Those who want to position themselves as the leading-edge professional to better serve the specific needs of highly informed clients, require a different knowledge base than those who focus on simple, annual or single transactions.

Knowledge Bureau students join us for a variety of reasons and needs:

1. To earn CE/CPD Credits leading to certification and accreditation
2. To learn new industry skills leading to the achievement of diploma in a new skillset
3. To develop and master strategic technical skills leading to prestigious business designation
4. To increase and deepen knowledge of taxes and their effect on both incomes and capital throughout life events like investment, retirement, succession and estate planning services.
5. To expand their network and circles of influence leading to cross-referrals, mentorships and new client relationships.
6. To master new concepts and skills in the comfort of home or office as an individual or to learn as a team in a multiple dimensional learning environment.
7. To access sophisticated professional software solutions, online references and tax libraries, a wide breadth of true-to-life case studies and thought-provoking questions that stimulate new opportunities to be a truly valuable resource to clients.

Knowledge Bureau educational programs are designed to help the advisor transition meetings with clients who have or will accumulate more wealth through inheritance, sale of business or growing investment accumulation, to full multi-faceted investment and product planning solutions. Our courses will also give you the background knowledge to better communicate with a full professional advisory team including accountants and lawyers.

"Having successfully completed financial accounting courses in my Business Administration program, I did not feel that the Basic Bookkeeping course would cover any new topics I did not already know*, but I was wrong*. This is a great refresher course or foundation course for anyone wanting to enter into this field. This online learning environment allows you to work at your own pace, the website is easy to navigate, and the online support is quick to respond and effective. I can't wait to dive into the 2nd of my 6 courses required for my bookkeeping designation. Thank you for your support, it was very nice to be acknowledged for my accomplishments. Not only is the Knowledge Bureau a great learning institute, but also a top-notch service provider: the staff go out of their way." Dawn S., BC

ABOUT THE DISTINGUISHED ADVISOR PROGRAMS

Who is the Distinguished Advisor?

The Distinguished Advisor has earned a Certificate of Distinction, diploma or a prestigious designation from Knowledge Bureau. These achievements signify that this is someone who can discuss strategic, tax-efficient financial solutions for individuals, families and multiple generations to encompass important financial life events like pre-and post-retirement planning, business and succession/estate planning.

As a result, the Distinguished Advisor can select and deliver more sophisticated value propositions to their clients in an ever-changing tax and economic environment.

The Distinguished Advisor is someone who understands tax, estate and retirement planning; a professional whose quality and breadth of knowledge and experience leads to the right investment product solutions. That advisor is a better financial mentor and coach to clients and an important member of a broader professional team of tax accountants, financial planners and legal advisors. In short, the Distinguished Advisor is more referable by both clients and their advisors.

It's Not About Book Size…It's About Brain Power…
Leading to the Strategic Execution of the Right Results

Knowledge is power, especially when you understand the integration between all the elements of tax-efficient financial planning. The right results require longer term planning; that's the reason why both strategy and process is an important component of our practical instruction. Knowledge Bureau knows that time is money. . .we make continuing education convenient and rewarding for top advisors who want to be more referable by both clients and other advisors. With Knowledge Bureau, you can learn in the convenience of your home or office by self study or by attending various live content events with outstanding, passionate and expert instructors.

From Single Transactions to Multi-Dimensional Solutions…

By choosing Knowledge Bureau's well-rounded continuing education program, the Distinguished Advisor evolves from "product salesperson or single-transaction facilitator" to "professional advisor" who is invaluable to the family's financial future.

"This is the first course that I've taken that has had an immediate impact on my business. The introduction to the calculators plus the training on how to use them has been very useful in preparing retirement income plans in my practice. The material is interesting and as I mentioned very relevant to today's retirement wave. Thank you for strengthening my business." **Marc Ouellet, Ottawa, ON**

Knowledge Bureau Certification Empowers Advisors with New Skills and Strategies for Success

Rather than collecting "CE points" required to keep up their licensing, designations or professional association memberships, students of the Knowledge Bureau learn solutions-based concepts that can be immediately applied to a client's needs, leading to the right investment product and tax planning solutions. The Distinguished Advisor, in short, is a knowledgeable, confident individual who can also work more effectively with a full professional advisory team to better meet client objectives, and help them achieve true peace of mind through sustainable family wealth.

Manage Your Risk with our Free Trials and Money Back Guarantee

Try it out for yourself with our Free Course trials. . .earn 2 free CE/CPD credits if you wish. But we hope you will use this risk-free opportunity to enter a new learning environment and experience education differently. . .with practical applications, challenging new concepts and strategies and great new ideas for serving your clients more professionally. Take this opportunity to choose the right comprehensive course for your time and money and fill knowledge gaps that really matter to your interaction with your clients.

It's why so many agree, at Knowledge Bureau, we're the "E" in "CE"

"I am currently putting our entire office through a variety of Knowledge Bureau courses. They are the best of what is out there for in office training." Bernadette M., AB

"My objective in taking Knowledge Bureau courses was to continue learning so that I can better serve my clients with simple sound advice that works. My objectives were met with a very simple and clear process the has proven results." Rodney J., BC

"My objective in taking this course was to understand the theory behind Managerial Accounting. All the key areas of managerial accounting were covered in this course. It was a GREAT course that can be taken according to my own schedule." Akbar P., ON

"The DFA - Tax Services Specialist stream of courses teaches not only the practical application of tax legislation and interpretation, but also what is probably the most advantageous skill set: How to Think. The courses give you the information required, but not on a platter. You need to develop the ability to think in order to apply the lessons learned in a practical manner." Alan R., ON

KNOWLEDGE BUREAU ONLINE CERTIFICATE COURSES

*It gives me great pleasure to introduce **Knowledge Bureau** --presenting the latest in continuing professional development--for staff training, upgrading and continuing education credits with your professional organization. Take an academic path to prestigious certification and designation, too. Choose from 24 courses by self study. Each course features leading edge tax and financial planning techniques and three great ways to learn: Audio lecture, online case studies and testing, together with a handsome professional reference library – all supported by our friendly consultants and instructors. Our courses are written by Canada's most prolific practitioners in the tax and financial services industries.* ***Evelyn Jacks, Founder & President***

Your Answer to Tax Training, Updating and Continuing Education in the Tax and Financial Services Industry

COURSE COMPONENTS

- Knowledge Bureau Report: Keep up to date throughout your learning experience
- Online Learning Environment: Join our Virtual Campus with your own logon
- Knowledge Journal: Access to the first chapter of the course
- Online Presentation: Meet your Instructor! PowerPoint presentation & audio lecture
- EverGreen Explanatory Notes: Tax Research Library available during trial period
- Knowledge Bureau Calculators: Wealth Management tools available during trial period
- Evaluation Software: Some trials include a student license for Tax and Accounting software
- Case Studies: Online true-to-life scenarios to apply what you've learned, with expert guidance
- Chapter Quiz: Multiple choice questions to test your understanding of the course material
- Blended Learning: Attend our CE Summits Held in January, May and November for peer-to-peer learning experiences with expert instructors. Earn valuable CE/CPD Credits, too.

GETTING STARTED - DISTINGUISHED ADVISOR DESIGNATION PROGRAMS – ONLINE COURSES AND BLENDED LEARNING OPTIONS

FILL KNOWLEDGE GAPS

- ***It only takes 30 hours to earn a Certificate***
- Take 1 online course and start immediately OR
- Attend 3 Distinguished Advisor Workshops offered 3 times per year January, May and November in select cities
- Each online course $795

ENHANCE TECHNICAL SKILLS

- ***It only takes 3 Courses to earn your Diploma***
- Select from 3 courses from 4 specialist streams of learning: Tax, Bookkeeping, Business Services, Retirement Planning: 30 hours per course; all resources, tools and instructor support included.
- Tuition Fees $2385, early registration tuition options available

BUILD BUSINESS SKILLS

- ***It only takes 6 Courses to earn your designation as a Specialist***
- Select from 6 courses from 4 specialist streams: Personal Tax, Bookkeeping, Corporate Business Services, Retirement Planning: 30 hours per course; includes all resources, tools, instructor support.
- Tuition Fees $4770, seasonal early registration tuition reductions apply if enrolled by: March 15, June 15, Sept. 15 and/or Dec. 15
- Graduates: take note of the Executive Business Builder Designation and Real Wealth Manager Programs in Practice Management.

CHOOSE FROM THE FOLLOWING SPECIALIST PROGRAMS, described on the pages that follow:

RWM™ (Real Wealth Manager) DESIGNATION	EXECUTIVE BUSINESS BUILDER DESIGNATION
DFA-TAX SERVICES SPECIALIST™	DFA-BOOKKEEPING SERVICES SPECIALIST™
• Introduction to Personal Tax Preparation • Intermediate Personal Tax Preparation • Advanced Family Tax Preparation • T1 Professional Tax Preparation - Proprietorships • Final Returns on Death of a Taxpayer • T3 Basic Tax Preparation	• Bookkeeping for Small Business • Advanced Payroll for Small Business • Debt and Cash Flow Management • Managerial Accounting and Budgeting • Accounting for Multiple Business Profiles • Accounting for Business Growth and Transition
MFA-RETIREMENT SERVICES SPECIALIST™	MFA- BUSINESS SERVICES SPECIALIST™
• Debt and Cash Flow Management • Fundamentals of Succession Planning • Tax Efficient Retirement Income Planning • Tax Strategies for Investors • Portfolio Risk Management in Retirement • Use of Trusts in Tax & Estate Planning	• Advising Family Businesses • T2 Tax Preparation for Small Business • T2 Tax Preparation for Professional Businesses • Business Valuation for Advisors • Cross Border Taxation • Optional Course

CE SUMMITS

To fill those knowledge gaps or to gain the most recent updates and changes, advisors may also choose the CE Summits. Offered in various cities throughout the country, these Instructor-led CE Summits offer different cutting-edge topics and outstanding expert speakers at every event and provide great networking opportunities. These CE Summits also offer blended learning opportunities providing the benefits of pre-reading materials.

Blended Learning: Online, Instructor-Led & Peer-to-Peer = Outstanding Educational Experiences

Earn 3.5 CE/PD Credits from the Pre-reading and 6.5 CE/PD Credits in class with the option to continue with online studies post session. Credit counts towards designations in the DFA-Tax Services Specialist, DFA-Bookkeeping Services Specialist, the MFA Specialist programs and The Real Wealth Manager (RWM™) programs .

WINTER THEME	SPRING THEME	FALL THEME
ADVANCED PERSONAL TAX UPDATE	POST BUDGET ACTION STRATEGIES FOR TAX AND FINANCIAL ADVISORS	YEAR END PLANNING: FOR INVESTORS AND SMALL BUSINESSES

What Our Students Say:

"This was my first distinguished advisor workshop. The workshop was very well organized. There was a very thorough review of the material and an extensive amount of material covered. The presenters were knowledgeable." Heather Milne-Hall

"Your tax sessions in January are always very informative, full of new budget news, tax breaks and it also a good time to connect with other tax preparers." Joanne DeMichele

"Yes, I would recommend this program. . .very in-depth information (unlike many competitors)."

L. Bourgeois, AB

"I would definitely recommend this workshop to all tax and accounting professionals as the information provided will provide them with the added knowledge which will enhance their practice." Jenifer P., ON

"I have recommended to my colleagues...This is more cutting edge and offers me better knowledge opportunities." Brad C, AB

THE DISTINGUISHED ADVISOR CONFERENCE

The Distinguished Advisor Conference is Canada's pre-eminent educational event for wealth advisors in the tax and financial industry who are looking for continuing professional development that focuses on strategic issues that will cause you to think about change: new directions that are required to steward family wealth into the future, all brought to you by foremost thought leaders in their fields.

Throughout times of great change, we have been proud to build the best brand in excellence in financial services conferences – Knowledge Bureau's Distinguished Advisor Conference! We invite you to join us to

Experience Education Differently with 18 outstanding thought leaders and close to 200 peers

The theme for the Distinguished Advisor Conference November 11-14, 2018 is The Changing Face of Community – Collaboration with Impact. Explore your greater potential in a dramatically changing landscape. As an industry and as individuals lucky enough to live in Canada, it's a great time to work "above our privilege" - that is, to set higher goals, improve services and to give back more in mentorship and engagement to a new client base with vastly different demands of their tax and financial advisors.

This is a high-profile event with a significant national footprint contributes to the national dialogue on critical matters of interest to the advisors and firms present. Experts and visionaries from all sides of the tax, accounting and financial services including noted senior industry leaders have participated in thought provoking discussion throughout the conference agenda.

"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, ivari - formerly Transamerica Life Canada

"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

"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

QUALIFYING FOR THE DISTINGUISHED ADVISOR PROGRAMS

Pre-requisites: To participate, the following pre-requisites must be met:

- **Recommended:** Grade 12 or equivalent level education
- **Entry to Diploma or Designation Programs**: Earn One Knowledge Bureau Certificate 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

- **Annual Licensing of Designation and Certification Marks:** Graduates of the DFA-Tax or Bookkeeping Services Specialist™ Programs or the MFA™ Designation Program or The Real Wealth Manager (RWM™) Program are required to earn 15 continuing education hours annually to relicense use of their certification marks.

Open architecture: Students may student at Knowledge Bureau for professional self-improvement or to earn a Distinguished or Master Financial Advisor Designation. This can be done by taking:

1. Six online courses (180 hours)
2. Four online courses (120 hours) and 6 Distinguished Advisor Workshops (60 hours)
3. Four online courses (120 hours) three DAW (30 hours) and two DAC (Distinguished Advisor conferences)

Distinguished Financial Advisor Designation Program Streams:

- DFA-Tax Services Specialist™
- DFA-Bookkeeping Services Specialist™

Master Financial Advisor Designation Program Streams:

- MFA-Retirement Services Specialist™
- MFA-Business Services 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 REAL WEALTH MANAGEMENT PROGRAM

THE REAL WEALTH MANAGER (RWM™) CERTIFICATION MARK

IS THE PRE-EMINENT STANDARD IN WEALTH MANAGEMENT SERVICES. . .

Comprehensive training and tools in client-centric wealth advisory services enable you to position yourself as the Primary Advisor of an inter-advisory team of professionals.

1. WHO IS THE REAL WEALTH MANAGER?

The Real Wealth Manager is a professional who has earned the right to use the RWM™ certification mark after comprehensive training in the delivery of goal-based, client-centric wealth management solutions. The Real Wealth Manager leads a multi-stakeholder team, comprised of other financial services professionals and family members, in a holistic and long-term approach to family wealth planning. The focus is on four elements of Real Wealth Management: the accumulation, growth, preservation and transition of sustainable wealth; that is, after taxes, inflation and fees.

2. THE RWM™ ADVANTAGE: CERTIFIED SKILLSETS

Advisors authorized to use RWM™ behind their names have a deep and broad understanding of both the behavioral and financial skills required to manage family wealth over multiple generations. Using extensive skills in providing tax efficient Real Wealth Management services, clients are presented with an unparalleled opportunity to work with a primary advisor who assembles a most trusted team of specialists to guide financial requirements throughout various family lifecycles.

In collaboration with the family, the RWM develops a strategy and follows a process to manage inter-generational wealth on an after-tax basis, thereby setting the standard for decision-making for investment, retirement, business, succession and estate planning. The underlying accountability of the team is the stewardship of wealth from one generation to the next.

3. MEETING HIGH STANDARDS WHILE COMPLEMENTING EXISTING CREDENTIALS

The RWM™ is earned with the completion of an 11-module program. Ongoing use of the certification mark requires 30 hours of continuing professional development in each two-year cycle. Best of all, the RWM complements other industry designations, requiring the graduate to be in good standing and practice with the highest standards of conduct.

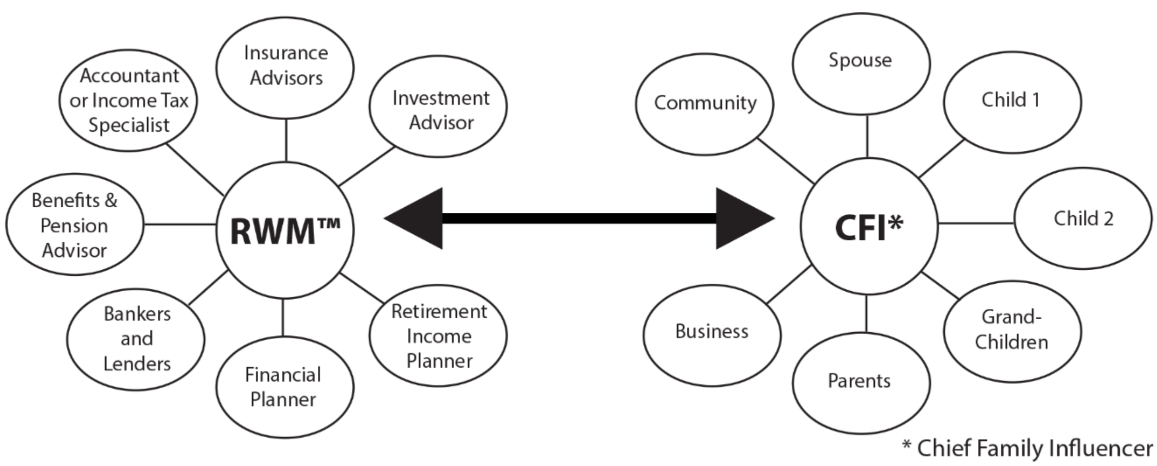
4. WHAT'S INVOLVED?

The RWM is positioned with the training, tools and processes to look at a client's situation at a higher standard of care than a regular advisor. Helping over the long term, the RWM contributes not only as a knowledge specialist, but most importantly, as the **primary advisor** trained in the inter-advisory discipline of Real Wealth Management™. Specifically, the RWM™ possesses:

1. **Deep Knowledge** in a field of specialization suitable to their clients' needs:

- Investment Income Services
- Retirement Income Services
- Tax Planning Services
- Succession and Estate Planning Services

2. **A Strategy and Process** for Joint Decision-Making:



5. KNOWLEDGE BUREAU EDUCATION: SYNONYMOUS WITH HIGH STANDARDS

We are proud to be the exclusive post-secondary educational institution offering the RWM™ Certificate of Distinction as well as the MFA™ and DFA-Specialist™ Designation Programs, each of which lead financial professionals to a deeper level of specialization in their chosen field of expertise. Tens of thousands of professionals in the financial services, tax and accounting fields have trained with us over the years. A Knowledge Bureau Education is synonymous with high standards of excellence. Our programs include self-study courses conveniently available online, regional workshops, conferencing, books, subscription services and most recently the RWM Program.

6. WHAT SKILLS DOES A RWM™ HAVE?

The RWM™, the primary advisor in providing comprehensive and collaborative wealth advisory services, is specifically trained to lead strategic decision-making by an inter-advisory team with family stakeholders. The steps to this approach include:

- **Possessing** deep knowledge in the advisor's field of practice
- **Acting** as the **primary advisor** through a strategic process of decision making
- **Listening** for the client's life and financial triggers
- **Strategizing** using the "Four RWM™ Elements": Accumulation, Growth, Preservation and Transition of sustainable wealth
- **Managing** the team of specialists to provide required expertise for financial solutions
- **Implementing** the RWM strategy on an efficient after-tax, after-cost basis with all stakeholders.
- **Analyzing** financial data expertly and consistently over time to meet financial milestones
- **Reviewing** and adjusting the strategy and process to meet ongoing client objectives.

7. CLIENTS WANT CUSTOMIZED SOLUTIONS

According to a recent study* by the CFA Institute, "the connection between professional skills and customer outcomes must become more symbiotic. . .wealth managers must demonstrate greater relevance to the current and future needs of clients and prospects." The RWM cements his or her relevance to the family by confidently delivering customized financial strategies based on client objectives and goals with a process for accountable solutions over time. Your clients will appreciate the opportunity to make sound financial decisions with a most trusted advisor who really knows them well and can help them visualize the future while navigating a complicated financial world. The result is a pathway to true affluence and peace of mind.

*The Value of Premium Wealth Management, 2017

8. EARN YOUR PRESTIGIOUS CERTIFICATE OF DISTINCTION AND THE RWM™

An ever-growing number of advisors from all sides of the financial services are competing for clients. To avoid getting "lost in the noise" and to survive and grow, leading advisors can now differentiate themselves with this advanced level designation that complements the standard designations held by many planners, advisors and accountants.

- Become the **primary advisor** through all market conditions and life cycles
- Enhance your skills, fast-track your career and elevate client services
- Increase assets, revenue, team efficiency and profitability
- Work effectively with and increase referrals from other professionals
- Differentiate yourself from the mass of designation holders with a unique education

9. FEATURES OF THE REAL WEALTH MANAGEMENT PROGRAM

Structure Your Advisory Practice for the Future with Elements of Real Wealth Management Program and Earn Your RWM™ Certification Mark.

*11 Comprehensive Modules * 15 Professional Software Tools * Personalized Instruction*

1: Defining Real Wealth Management
2: The Strategic Approach in Real Wealth Management
3: The Costs of Building Wealth
4: Objective-Based Planning and Joint-Decision Making
5: Managing Sources of Income and Capital
6: The Real Wealth Management Process
7: Elements of RWM: Accumulation
8: Elements of RWM: Growth
9: Elements of RWM: Preservation
10: Elements of RWM: Transition
11: Leading the Real Wealth Management Strategy

10. CHOOSE KNOWLEDGE BUREAU: YOUR TRUSTED EDUCATION PARTNER

We would like to create a lasting learning relationship with you and your team, for all your professional development and continuing education requirements including the attainment of the RWM™ certification marks. Count on us for:

- Practical training you can use right away with your team and clients
- Unparalleled personalized attention to ensure your success in the program
- Flexible learning format to fit even the busiest schedules – conveniently online and available 24/7
- Tax deductible tuition fees which qualify for the Tuition Fee Credit on your tax return
- All course materials, custom-designed software tools, research library, quizzes, testing and personal support are included in the single fee
- No risk, money-back guarantee – take a free trial anytime to be sure
- Continuing education credits from most professional bodies and regulators

EXECUTIVE BUSINESS BUILDER PROGRAM

Especially for practitioners in the tax accounting and financial services who work with business leaders

ARE YOU FUTURE-PROOFING YOUR BUSINESS?

Are You Ready to Be Your Clients' Most Critical and Valued Business Advisor? Do You Have the Leadership Skills to Build Sustainable Enterprises That Thrive In New Conditions? If not. . .

THE ***EXECUTIVE BUSINESS BUILDER PROGRAM*** IS RIGHT FOR YOU!

Who is the ideal candidate for taking the Executive Business Builder Program?

If you are currently working as a tax accountant, bookkeeper, financial or legal advisor, you may aware of the gap many business leaders have in scaling their enterprises up to the next level of growth. This can include managers or executives who work in a business setting or independent business owners who have acquired a new firm or who are getting ready to transition their firm to its next leaders. Or you may be that business leader who want to learn how to do this for yourself and your business.

Earning your certification as an Executive Business Builder will provide you with the skills to work with business leaders as a coach and mentor to achieve their business growth goals through a comprehensive six-course program.

What skills will I acquire by taking the Executive Business Builder Program?

The Certified Executive Business Builder has the skills to coach business leaders to create and implement strategies, processes and plans that develop and enable business growth.

How Will I Be Able to Use My Skills?

Graduates of this program will be licensed to use the valuable methodology and materials taught in the Certified Executive Business Builder Program, for one year after graduation, in their work with business leaders. An annual recertification of skills will be required after this. This can be attained by attending an annual *Business Builder Retreat*. The retreat is included at no charge in the first year of the program to enable undergraduates to participate in a mentorship opportunity as a part of a national network of Executive Business Builders.

FOUR KEY REASONS TO BE A CERTIFIED EXECUTIVE BUSINESS BUILDER: If you are in the professional tax, accounting or financial services, your success in building your own future-ready practice will be impacted key trends in the immediate future; becoming a Certified Executive Business Builder can also help you coach and mentor other business leaders to respond to change:

- **Technological advances will replace low cost, transactional services** like basic bookkeeping, simple tax preparation and data entry as automation and Artificial Intelligence, outsourcing and even competition from the CRA and its' "auto-fill my return" capabilities emerge. Yet these services are poised for growth when professionals provide advice rather than transactional solutions.
- **New regulatory complexity** requires deep and broad technical knowledge from well versed specialists to avoid onerous penalties and new compliance burdens.
- **Clients with a diversity of assets need more help with complex decision-making**, especially in the area of business growth, strategic financial planning and retirement and succession planning. The Certified Executive Business Builder can provide the skills to pull strategy, process and leadership together.
- **Business Owner clients** require advice to help them build their businesses to the next level. For example:
    - **First and foremost**, **compliance matters**. In a much more vigorous regulatory environment, business leaders need your help in being compliant with CRA and keeping their books. The last thing they need is your "consultation" on how to do it themselves. Your network of highly qualified, reliable and engaged tax practitioners and bookkeepers is invaluable here, if your firm cannot help to do the day-to-day record keeping.
    - **Strategic business foundations matter**. Business owners often know how to build a widget or perform a service, but they don't always have the skills to build business foundations with strategy, policies and procedures that help them grow. To get past the "start-up" stage, business owners who transition to become "professional" business leaders evolve to learn practices that build both revenues and equity.
    - **Financials matter**. The professional business builder requires great data and analytics: Real time insights to identify trends, risks and actionable information that lead to new competitive advantages. You can help set up systems and processes for these purposes.
    - **Operations matter**: Systems integration, risk management and security all form part of the modern business owners' reality. This requires stepping back and out of the business to review strategic business plans 3 to 5 years into the future and then to develop procedures to enable operations to get there.
    - **Human Resources matter**: Probably the most difficult component of business growth for most business owners, you can help coach to be better at talent recruitment and retention, management, training, and mentorship, especially in the area of workforce diversity
    - **Sales, Marketing and Relationships matter**: Online, mobile, self-service and face-to-face, sales and marketing is about building long term relationships with clients who will refer your business because they know your leadership, culture and continuity plans.

WHY THIS PROGRAM WORKS: The new *Executive Business Builder Program* from Knowledge Bureau will provide you with the skills to help you transform your own enterprise into a new direction as a vibrant, growing advisory practice that is ready to help your clients meet the demands of change.

- Learn to build a company that generates great value for future investors with sustainable business practice that face down disruptive trends
- Become a confident business leader and mentor to your business clients who need help with critical decision-making through real time advice, aided by magnificent tools and resources

THE PROGRAM: The Executive Business Builder Program provides the framework for business development – how to build great companies that are future-ready – through eight interactive courses:

1. **BUSINESS BUILDING FOUNDATIONS**
    - **STRATEGIC BUSINESS PLANNING** – How to build a great organization with focused decision-making and outstanding financial success. Learn expert business planning strategies that support. . .investment.
    - **OPERATIONAL FOUNDATIONS TO SUPPORT BUSINESS GROWTH** – Learn how to structure the core operations departments required to build and manage a company including finance, administration, sales, marketing and staffing to grow a market-driven business someone will eventually buy.
    - **BUSINESS LAW** – Every company requires the interaction with legal talent to develop contracts with the various stakeholders it interacts with. This course provides the background information business owners need to understand basic contractual agreements and templates for engagements with customers, sub-contractors and employees.
2. **BUILDING BUSINESS EQUITY**
    - **MARKETING MASTERY FOR BUSINESS BUILDERS** – In this practical course learn how to establish and articulate your ten key principles in marketing your business, a process for developing communications strategies and tips on branding a sustainable enterprise.
    - **BUSINESS VALUATION** – This course is designed in a practical format and will help an advisor become a valuable resource to their clients when considering business valuation issues. Key concepts include understanding the notion of value, company specific and market based approaches for estimating value, the key stages of the business transaction process, value and investment transactions, and the implications of financial performance on value.
3. **BUILDING BUSINESS LEADERS**
    - **BUSINESS LEADERSHIP, CULTURE AND CONTINUITY** – Learn how to invest in the people who work with you to create an innovative culture in which all stakeholders in the success of the organization are focused and working in unison. Build up a new generation of leaders for the future.
    - **BUSINESS BUILDERS RETREAT** – As a final step in the program, developed as an annual refresher, join business owners from coast-to-coast for a one day, informal retreat that will inspire you, help you hone your leadership skills and share sensitive business issues you wouldn't discuss with family or other employees. This day is free when you also come to Knowledge Bureau's Distinguished Advisor Conference!

COURSE DELIVERY: Online with interactive lessons with instructors and peers. Call us for more information at 1-866-953-4769

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