ABOUT US

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

Contents

ABOUT KNOWLEDGE BUREAU

Knowledge Bureau™ is Canada's leading national post-secondary educational institute for continuing professional development in the tax and financial services. We are focused on providing the cutting edge knowledge and skills required for professional financial advisors who work together in making joint financial decisions with their clients about their family's wealth.

Our Unique Value Proposition to Our Students: We provide an academic path to your continuing professional development so you can offer outstanding value to your clients as a specialist in your field.

Our Goal for Each Student*:* To be a confident and skilled professional who is enabled to provide both strategic and tactical solutions with confidence in the tax and financial services, with cutting edge, practical knowledge mastery.

Our Educational Philosophy: We invite you to become part of a new network of Real Wealth Managers™ who collaborate with multiple stakeholders – both in the family and in professional networks - to steward sustainable family wealth from one generation to the other. We do that through an educational framework called 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 *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.

Knowledge Bureau also offers the *Distinguished Advisor Workshops™* held in major centres across Canada. These day long workshops are technical in nature, taught by industry leaders in a blended learning opportunity that supplements its online courses. An annual international event, the *Distinguished Advisor Conference™*, explores strategic wealth and practice management techniques in locales clients retire to.

We also partner with 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,
Founder & President
Knowledge Bureau

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 "Distinguished Advisor Programs" include comprehensive online courses, the Distinguished Advisor Workshops and the Distinguished Advisor Conference. But it's our friendly, highly qualified team of educational consultants and expert instructors that will make the difference: helping you make the best educational decisions for your time and money.

Evelyn is Canada's most respected educator in tax and financial literacy and one of Canada's most prolific financial authors. She has penned 52 financial books on tax preparation and tax efficient family wealth management, many of them bestsellers. She has twice been named one of Canada's Top 25 Women of Influence.

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 and commentaries, most recently in MoneySense Magazine, the Toronto Star and for the Toronto Stock Exchange. She appears regularly on national and regional television and radio outlets including CBC, CBC Newsworld, CTV News, and BNN. She tweets @evelynjacks.

Evelyn has been a role model for women in business. Evelyn 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. 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 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

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 October in select cities
- Each option $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 and Estate 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 and Estate 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 new 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**
• T1 Basic Tax Preparation • T1 Advanced Tax Preparation • Tax Preparation for Proprietorships • Final Returns on Death of a Taxpayer • Cross Border Taxation • T3 Basic Tax Preparation	• Basic Bookkeeping for Small Business • Advanced Bookkeeping for Multiple Businesses • Advanced Payroll • Budgeting & Managerial Accounting • Debt and Cash Flow Management • T2 Tax Preparation for Micro Enterprises
MFA- BUSINESS SERVICES SPECIALIST	**MFA-RETIREMENT & ESTATE SERVICES SPECIALIST**
• Advising Family Businesses • Tax Planning for Corporate Owner-Managers • T2 Tax Preparation for Professional Practices • Fundamentals of Business Succession Planning • Accounting for Business Transition • Business Valuation for Advisors	• Tax Strategies for Financial Advisors • Tax Efficient Retirement Income Planning • Portfolio Risk Management in Retirement • Insurance Strategies for Small Business • Use of Trusts in Tax & Estate Planning • Investment Strategies in Charitable Giving

DISTINGUISHED ADVISOR WORKSHOPS

To fill those knowledge gaps or to gain the most recent updates and changes, advisors may also choose the Distinguished Advisor Workshops. Offered in various cities throughout the country, these Instructor-led workshops offer different cutting edge topics and outstanding expert speakers at every event and provide great networking opportunities. These workshops 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 and the MFA Specialist programs.

JANUARY THEME	MAY THEME	NOVEMBER THEME
ADVANCED PERSONAL TAX UPDATE	FEDERAL BUDGET UPDATE, RETIREMENT, ESTATE & CROSS BORDER PLANNING	YEAR END PLANNING AND FAMILY BUSINESS BUILDING

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 5-8, 2017 is Canada 150: Financial Advice at the Crossroads of Change.* Explore your greater potential in a dramatically changing landscape. The new Innovative Economy Canada finds itself in will be fraught with disruption and brimming with opportunity for tax and financial advisors to work together. Be fully prepared to gain the upper hand in the latest trends in tax, retirement, succession and estate planning to help your clients build wealth.

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 are required to earn 12 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-Business Services Specialist™
- MFA-Retirement & Estate 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**

NEW! THE REAL WEALTH MANAGEMENT PROGRAM

NEW! 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 2 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.

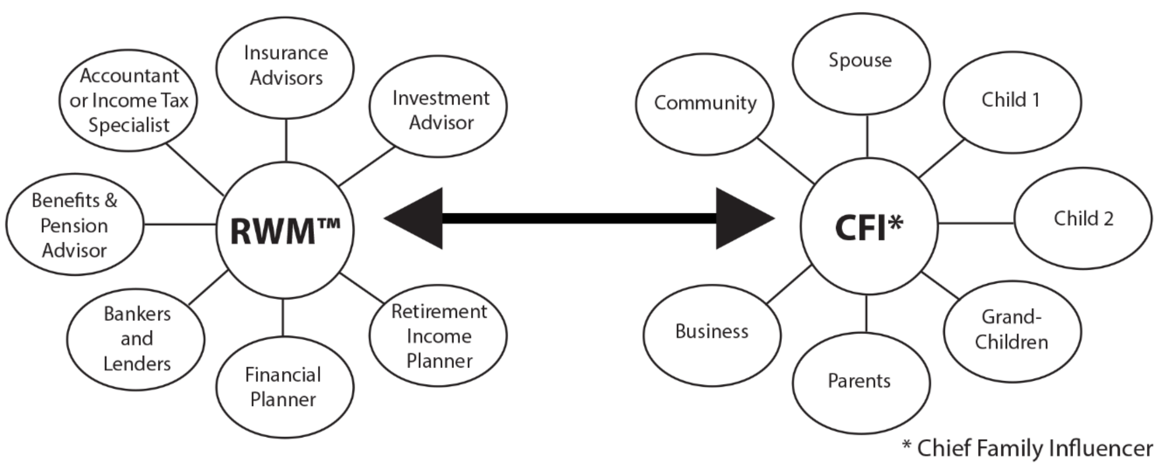
4. WHAT'S INVOLVED?

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

NEW! COMING IN MAY 2017. . .

Especially for practitioners in the tax accounting and financial services industries

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 DESIGNATION PROGRAM*** MAY BE RIGHT FOR YOU!

FOUR KEY REASONS: If you are in the professional tax, accounting or financial services, your success in building a future-ready practice will be impacted key trends in the immediate future:

- **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.
- **New regulatory complexity** requires deep and broad technical knowledge from well versed specialists to avoid onerous penalties
- **High Net Worth clients need help with complex decision-making**, especially in the area of financial and retirement planning, as well as business succession, which will require collaboration amongst a variety of critical stakeholders to the success of the enterprise
- **Business Owner clients** require advisory services to create sustainable business practices and critical decision-making surrounding:
    - Business building foundations, planning and strategy
    - Data Analytics: Real time insights to identify trends, risks and actionable information that lead to new competitive advantages
    - Operations: Systems integration, risk management and security
    - Human Resources: Talent management, training, and mentorship especially in the area of workforce diversity
    - Marketing and Relationship Management: Online, mobile, self-service and face-to-face

TWO KEY BENEFITS: The new *Executive Business Builder Designation Program* from Knowledge Bureau will help you take your own enterprise into a new direction as a vibrant, growing advisory practice ready to meet the demands of change in your industry.

- 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. Your external collaborators, especially financial partners and investors, will be delighted to have their specific expectations met through expert business planning strategies that support growth plans and future returns on your investment
- **OPERATIONAL FOUNDATIONS TO SUPPORT BUSINESS BUILDING AND GROWTH** – Planning for sustainable profit growth requires a framework for operations around which client relationships will be built and retained. Learn how to structure the core operations departments required to build and manage a company including finance, administration, sales, marketing and staffing as well production to grow a market-driven business someone will eventually buy.
- **FINANCE AND ADMINISTRATION** - Never before have the systems for reporting business activities been as advanced, but it is in the analytics that businesses are built, nurtured and grown for success. From forecasting to budgeting to the classification of revenue lines, pricing models, marketing and sales planning and results, performance monitoring moves the astute business owner and advisors from number crunching to valuable business insights and new competitive advantages. Learn how to develop processes and procedures that will provide you with actionable information for a business enterprise, identify risks and trends and then, make great business decisions.
- **HUMAN RESOURCES** - Managing talent in today's diverse marketplace includes both in house staff and out-of-house consultants who are largely bound by similar training, policies and procedures, which begins with a proper organizational structure, role descriptions and required outcomes, contracts, evaluation, retention strategies, bonus strategies, and the establishment of an ongoing career and training map. This course will provide the opportunity to develop this critical piece of the business growth puzzle.
- **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 EQUITY – ACQUIRING CUSTOMERS**
   - **MARKETING MASTERY FOR BUSINESS BUILDERS** – This practical course will help you move your business from a table-top to a vibrant growing firm by challenging you to stop thinking "old factory" and start working on ten key principles of marketing for entrepreneurs. It features a five-step marketing plan, an understanding of how to think about marketing messages, develop a brand and a process for marketing your big new ideas to engaged customers.
   - **MARKETING IN A DIGITAL WORLD** – New school applications apply to old school principles when building a growth enterprise: managing a pipeline of relationships, from prospective clients to retention clients and referrals requires an ongoing plan for brand development and evolution, client recruitment and retention and marketing activities that integrate budgets with client preference channels: online, in person or self-service. This course discusses market testing, research, analysis, segmentation and reporting with a focus on a digital environment.
   - **THE SALES DEPARTMENT** – Every business needs a sales department that focuses on growing customer bases quickly and inexpensively. Product innovation is a large part of a referral strategy; so is the ability to build bundles of products or services that can be delivered at a basic, enhanced or elite offering as clients move from one product line to another. This course will show students how to structure client acquisition strategies that work within budgets and timelines.

3. **BUSINESS LEADERSHIP, CULTURE AND CONTINUITY** – Great companies are lead by innovative leaders who set the strategy, develop the culture, engage all the stakeholders to the success of the enterprise in a focused direction to get results. They invest in their people personally and professionally as leaders and mentors and they inspire the best by challenging them to think bigger as a team. Learn how to lead and mentor a new generation of managers to help you build the organization of the future.

4. **PEER-TO-PEER BUSINESS LEADERSHIP** – The student will participate in a variety of face-to-face opportunities to hone business development skills
   - Presentation at the end of the course plus 30 more hours of peer-to-peer learning:
   - Day long workshops (up to 3)
   - 2 day conference plus 1 day long workshop

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

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