

BUSINESS BUILDER RETREAT

NOVEMBER 10 – 11, 2018



ALAN ROWELL, RWM, MFA, DFA-Tax Services Specialist

Knowledge Bureau Master Instructor

Alan Rowell has achieved his Master Instructor Certification with Knowledge Bureau by participating in a number of required milestones. The first is the completion of a designation with Knowledge Bureau (in fact Alan is a triple designate: he has the MFA™ (Master Financial Advisor) and DFA-Tax Services Specialist™ and RWM™ (Real Wealth Manager) designations.

He has participated in eight further steps to mastery: analysis and article writing for Knowledge Bureau Report, online course beta testing, student support, updating, student teaching, teaching, participating in content development and lecturing at marquis events at the Distinguished Advisor Workshops and Conference and for corporate clients of Knowledge Bureau, and mentoring of new instructors.

Alan brings over 35 years of practical business experience in the tax and financial services industries, specializing in working with, individuals and small to medium size businesses by providing accounting, taxation and business consulting services that are unique to each client. He has specific expertise working with financial advisors and their individual clients in bringing a tax perspective to investment, retirement and succession planning. He is recognized as one of Canada's leading tax services specialists. Alan is a regular commentator at CHCH – TV and has been featured in several national media interviews.

Since 1999, when Alan formed The Accounting Place, he has saved small business owners literally hundreds of thousands of dollars in income taxes through his savvy interpretations of the tax laws and his ability to help individuals and business owner's structure, operate and organize their financial affairs to their best overall advantage.

During the retreat, Alan will be acting as a moderator on November 11th.