



“The reason Intuit partners with Knowledge Bureau is simple... the quality of the attendees! They are an engaged audience.”

Scott Zandbergen, Intuit Group Marketing Manager

“Knowledge Bureau provides our clients with tax training for new staff, as well as seasoned staff looking to enhance their portfolio of services to their clients.”

Marc Labrecque, Sales Director, Trilogy Software

“Allows us to sharpen our minds with current information which is well-presented, in-depth and relevant to our industry.”

Erik Klumpe, Regional Director of Canada Operations, Liberty Tax

STRATEGIC PARTNER INFORMATION PACKAGE

National Educational Tours

Toronto • Winnipeg • Calgary • Vancouver
Ottawa • Edmonton

Tour 1
WINTER 2018

Advanced 2018
Personal Tax Update

Tour 2
SPRING 2018

Post Budget Action Strategies
for Tax and Financial Advisors

Tour 3
FALL 2018

Year End Planning:
Investors and Small Businesses

Become a Strategic Partner in 1 or all 3 tours.
See new categories for partner participation.
More information at: www.knowledgebureau.com/CESummits

Brought to you by:



CE SUMMITS

An In-Class Experience Especially for Practitioners in the Tax, Accounting and Financial Services Industries



A Unique Opportunity for Strategic Partners in Front of a Highly Qualified Audience

WE INVITE YOU...

to become a leader and mentor as a strategic partner of the CE Summits - a great opportunity to build relationships with tax and financial advisors gathered to study the latest in tax, retirement, investment, estate and business planning.

Key benefits:

- An engaged, qualified audience for your product and services.
- Your opportunity to participate in the program as part of the teaching faculty or as a networking leader.
- Complimentary attendance at this important Continuing Education event.
- You and your associates can earn valuable CE/CPD Credits.
- Preferred Rates and Group Study discounts for your COI.
- Recognition in Knowledge Bureau Report, distributed to over 17,000 advisors nationwide.
- Inclusion of your Company Logo and Profile in the printed Knowledge Journals and website.
- Cross-linking with www.knowledgebureau.com

PLEASE JOIN US...

as a Strategic Partner in Knowledge Bureau's new CE Summits for top advisors in the tax, bookkeeping, accounting and financial services. Learn more from our website: www.knowledgebureau.com/CESummits

PARTICIPATE IN A NATIONAL TOUR...

- Ottawa*
- Toronto
- Winnipeg
- Calgary
- Edmonton*
- Vancouver

* for CE Summits Winter 2018

What Our Students Say

"Knowledge Bureau is by far the most comprehensive training program and resource support available."

Diane C., AB

"Great presenters. Love the program. (still have the drive!) Love my workbook! Always!"

Lynda K., ON

"Absolutely, the info gained at the Knowledge Bureau workshops is unmatched."

Joey L., AB

"Applicable, valuable, an immediate opportunity to add value for clients."

L. Campbell, MB

"All topics - very informative."

Sato K., BC

"All updates very valuable, very professional. Wealth of knowledge with current clients will give me more referrals."

Eva F., AB

Join us in raising the bar in professional development for top advisors who provide real wealth solutions.

To register or for more information: www.knowledgebureau.com/CESummits or call 1-866-953-4769

CE Summits

Partnership Opportunities

SESSION LEADER PARTNERSHIP

Each City: \$2,500 / Discounts for Multiple City Selections - taxes extra

- Exclusive instructional opportunity during selected session time slots.
- Announced recognition at start of event and throughout all breaks.
- Space to display promotional brochures and products at workshop.
- Marketing recognition in pre-event and at-event materials: print brochures, online (linked to your website), workshop-specific e-blasts and the Knowledge Bureau Report, marketing material in the take-home Knowledge Journal, extensive social media recognition, too.
- Receive two complimentary registrations per city.

NETWORKING LUNCH AND BREAK PARTNERSHIPS

Each: \$1,950 - taxes extra

- Announced recognition at start of event and throughout all breaks.
- Space to display promotional brochures and products at workshop.
- Marketing recognition in pre-event and at-event materials: print brochures, online (linked to your website), workshop-specific e-blasts and the Knowledge Bureau Report, marketing material in the take-home Knowledge Journal, extensive social media recognition, too.
- Receive one complimentary registration per city.

A NATIONAL MARKETING OPPORTUNITY! LEADERSHIP IN PRINT

Be a strategic partner of the comprehensive Knowledge Journal, taken home by participants - a valuable legacy reference that delegates refer to often.

Per Tour:

Inside Front Cover - \$1,200 • Inside Back Cover - \$995

taxes extra

HOST A TABLE OF SIX OR A TABLE OF THREE UNDER YOUR COMPANY BANNER

Register 6 participants at your designated table with your logo and name.

Table of 6 - Each Individual City: \$1,476 (\$246 per participant)

Table of 3 - Each Individual City: \$ 990 (\$330 per participant)

taxes extra

SAMPLE AGENDA

Topics Are Specific to Recent Tax,
Economic and Budget Changes.
Join us in January, May and November.

7:30 - 8:30

DISTINGUISHED ADVISOR BREAKFAST

8:00 - 8:30

REGISTRATION AND COFFEE

8:30 - 9:30

SESSION 1: Strategies for Individual Retirement and Estate Planning with Evelyn Jacks, President Knowledge Bureau

9:30 - 10:30

SESSION 2: Current Issues in Personal, Corporate, Trust or Cross Border Tax

Session partnership

10:30 - 10:45

Networking Break and Sponsorship Fair

Break partnership

10:45 - 12:30

SESSION 3: Best Practices in Investment and Retirement Planning

Session partnership

12:30 - 1:00

Meet and Greet Networking Lunch

1:00- 1:45

SESSION 4: Round Table Discussion

1:45 - 2:45

SESSION 5: Family Wealth Planning

2:45 - 3:00

Networking Break and Sponsorship Fair

Break partnership

3:00 - 3:45

SESSION 6: Succession and Estate Planning

3:45 - 4:30

SESSION 7: Motivational Leadership and Business Building

Session partnership

4:30

CLOSING REMARKS AND CERTIFICATION



PARTNERSHIP PLEDGE FORM

To confirm your participation as a strategic partner of the CE SUMMITS, complete the information below and return this form to Knowledge Bureau by fax (204-953-4762) or email (registrar@knowledgebureau.com). Amounts are payable 60 days before each event. If you have any questions, please contact us at 1-866-953-4769 or visit us online at knowledgebureau.com.

Company: _____

Contact Name: _____ Title: _____

Company Address: _____ City/Province: _____ Postal Code: _____

Company Phone: _____ Fax: _____

Business Email: _____

SELECT YOUR STRATEGIC PARTNERSHIP LEVELS HERE:

SELECT CATEGORY	SELECT FEE	TOUR 1 WINTER 2018	TOUR 2 SPRING 2018	TOUR 3 FALL 2018	CHOOSE MULTIPLE TOURS
<input type="checkbox"/> SESSION LEADER PARTNERSHIP	<input type="checkbox"/> \$2,500 per city	<input type="checkbox"/> Toronto <input type="checkbox"/> Winnipeg <input type="checkbox"/> Calgary <input type="checkbox"/> Vancouver <input type="checkbox"/> Ottawa* <input type="checkbox"/> Edmonton*	<input type="checkbox"/> Toronto <input type="checkbox"/> Winnipeg <input type="checkbox"/> Calgary <input type="checkbox"/> Vancouver	<input type="checkbox"/> Toronto <input type="checkbox"/> Winnipeg <input type="checkbox"/> Calgary <input type="checkbox"/> Vancouver	<input type="checkbox"/> All Cities One Tour Save 10% <input type="checkbox"/> All Cities Two Tours Save 12% <input type="checkbox"/> All Cities Three Tours Save 15%
HOST A NETWORKING BREAK OR LUNCH <input type="checkbox"/> MORNING BREAK <input type="checkbox"/> LUNCH <input type="checkbox"/> AFTERNOON BREAK	<input type="checkbox"/> \$1,950 each	<input type="checkbox"/> Toronto <input type="checkbox"/> Winnipeg <input type="checkbox"/> Calgary <input type="checkbox"/> Vancouver <input type="checkbox"/> Ottawa* <input type="checkbox"/> Edmonton*	<input type="checkbox"/> Toronto <input type="checkbox"/> Winnipeg <input type="checkbox"/> Calgary <input type="checkbox"/> Vancouver	<input type="checkbox"/> Toronto <input type="checkbox"/> Winnipeg <input type="checkbox"/> Calgary <input type="checkbox"/> Vancouver	

SELECT CATEGORY	SELECT FEE	TOUR 1 - WINTER 2018	TOUR 2 - SPRING 2018	TOUR 3 - FALL 2018
LEADERSHIP IN PRINT <input type="checkbox"/> INSIDE FRONT COVER <input type="checkbox"/> INSIDE BACK COVER	<input type="checkbox"/> \$1,200 per Tour <input type="checkbox"/> \$995 per Tour	<input type="checkbox"/> Tour 1 WINTER 2018	<input type="checkbox"/> Tour 2 SPRING 2018	<input type="checkbox"/> Tour 3 FALL 2018
HOST A TABLE OF SIX OR THREE UNDER YOUR COMPANY BANNER Register 3 or 6 participants at your designated table with your logo and name.	Table of 6 <input type="checkbox"/> \$246 each city / person Table of 3 <input type="checkbox"/> \$330 each city / person	<input type="checkbox"/> Toronto <input type="checkbox"/> Winnipeg <input type="checkbox"/> Calgary <input type="checkbox"/> Vancouver <input type="checkbox"/> Ottawa* <input type="checkbox"/> Edmonton*	<input type="checkbox"/> Toronto <input type="checkbox"/> Winnipeg <input type="checkbox"/> Calgary <input type="checkbox"/> Vancouver	<input type="checkbox"/> Toronto <input type="checkbox"/> Winnipeg <input type="checkbox"/> Calgary <input type="checkbox"/> Vancouver

Your strategic partner commitment is not secured until payment is received. Session leaders must confirm 4 months in advance of each session.

*Ottawa and Edmonton available only for Winter 2018. Prices subject to change without notice.

PAYMENT:

Purchase Order attached; please invoice us, or Pay by Credit Card: VISA MC AMEX

Card Number: _____ Expiry Date: _____

Name of Card Holder: _____

Date: _____ Total Amount: _____ *GST extra - GST Number 885004713RT0001

Signature: _____

SCAN AND EMAIL TO: REGISTRAR@KNOWLEDGEBUREAU.COM OR FAX FORM TO: 1-204-953-4762

To register or for more information: www.knowledgebureau.com/CESummits or call 1-866-953-4769