ENHANCE YOUR CREDENTIALS AS A TAX SERVICES SPECIALIST

First Course Bonus
* Save 50% *

KNOW MORE.
MAKE MORE.

With the Prestigious Distinguished Financial Advisor™ Designation Program

Because Knowledge Counts.

Open your own tax preparation business or train your new and existing staff.

Included in every study program:

- Individualized study plans, personal instructor support
- Comprehensive Knowledge Journal (hard or e-copy)
- Online lessons, quizzes, and case studies
- Valuable professional software, calculators, tools
- Testing and accreditation
- Easy instalment plan customized to fit your budget

Knowledge Bureau®
Excellence in Financial Education

SPECIAL OFFER!

Enrol in the DFA-Tax Services Specialist™ Designation program and **get your first course at 50% off**.

For personalized service, call 1-866-953-4769 or enrol online at www.knowledgebureau.com.

START TODAY!

Risk Free Enrolment: Take a free trial at www.knowledgebureau.com.

Level 1: Diploma Program

Get your foot in the door with a great new job in the tax accounting industry, or build your own professional practice to do a broad spectrum of personal and corporate tax returns for individual families and businesses.

Increase your referral business from other professionals, too, by training new staff and growing your existing income tax preparation services business.

COMPLETE 3 COURSES: BECOME A CERTIFIED PERSONAL TAX PRACTITIONER™

T1 PROFESSIONAL TAX PREPARATION – BASIC

Perfect for rookie tax preparers. Learn a proven process for preparing consistently accurate T1 returns within a professional client interview and documentation management system.

Certified Skills:

- Introduction to income taxation and software use
- Understanding the business of filing tax returns
- Preparing five key profiles starting with credit filers
- Tax preparation for employment income
- Claiming employment deductions
- Families and children
- Reporting investment income
- Preparing returns for pensioners
- What's new for the upcoming tax year

T1 PROFESSIONAL TAX PREPARATION – INTERMEDIATE

Perfect for returning staff or basic course graduates, this course exposes students to a broad range of personal tax topics, focused on what's new in tax and a comprehensive line-by-line tax theory review.

Certified Skills:

- Learn what's new at the Department of Finance and CRA
- Employment income, perks, and deductions with a focus on family tax efficiency
- Optimization of Schedule 1 tax credits
- Focus on seniors and pension income splitting optimization
- Investors with both domestic and foreign income from property
- Capital dispositions in life and at death
- Straight-forward business returns, focused on changes in tax law

T1 PROFESSIONAL TAX PREPARATION – ADVANCED

Especially for experienced tax practitioners, this course will expose you to advanced personal tax scenarios to challenge your skills, especially in working with high net worth families.

Certified Skills:

- Thorough tax update and research review
- Employees: Drill down on perks and benefits
- Investors: Reporting of income from financial assets in diverse portfolios
- Managing capital: Acquisitions, dispositions, including real property
- Life events and their tax consequences
- Business starts and stops
- Planning for tax efficiencies at end of life

Any one of these certificate courses will enhance your skillset; combined together, they will propel your career opportunities!

Level 2: Designation Program

"Maintaining my designations ensures I stay current and connected and better able to advise my clients to the ever changing world of taxation. It has helped me work with them to keep as much of their hard earned dollars in their pocket while remaining compliant."
– Phyllis M., DFA-Tax Services Specialist, MFA, MB

"I was preparing T2 returns before enrolling in this course; now after finishing the course I find myself more confident than before."
– Manmeet T., DFA-Tax Services Specialist, BC

COMPLETE 6 COURSES: BECOME A DFA–TAX SERVICES SPECIALIST™

T1 PROFESSIONAL TAX PREPARATION – PROPRIETORSHIPS

Professional tax preparation for small business enterprises is the perfect adjunct for personal tax practitioners who wish to serve unincorporated business owners.

Certified Skills:

- Skillfully prepare the Statement of Business or Professional Activities
- Prepare worksheets for reporting home office expenses
- Understand and report variations in auto expense claims
- Prepare inventory control and cost of goods sold documentation
- Report asset acquisitions and dispositions on Capital Cost Allowance forms
- Know how to report acquisitions and dispositions of business enterprises
- Explore tax variations for farmers and fishing businesses
- Understand how to prepare returns for professionals and partnerships

FINAL RETURNS ON DEATH OF A TAXPAYER

Final tax returns must be discussed throughout the tax planning process with skill and professionalism to get the best tax results for the family. This course will provide the competencies and experience.

Certified Skills:

- Learn federal and provincial tax law at time of death of a taxpayer
- Understand rules for filing the terminal tax return
- Registered Investments: Planning to defer income reporting
- Capital Assets: Managing rollovers and tax deferral
- Estate Planning: What is reported immediately after death
- Probate and how to mitigate it
- Optional returns: Case studies in reporting income, deductions, credits and rollovers under a variety of options to reduce taxes and preserve family wealth

CROSS BORDER TAXATION

This course is perfect for tax professionals who wish to competently address cross border taxation issues to help clients with offshore assets, partial residency or U.S. connections; especially citizenship.

Certified Skills:

- Understand residency and citizenship as they relate to tax filing requirements
- File returns for immigrants and emigrants
- Manage tax filing requirements for snowbirds
- Understand reporting of income and property dispositions for non-residents
- Understand implications of the Canada – U.S. Tax Treaty
- Advise U.S. citizens in Canada of their tax filing rights and requirements
- Report transactions when there are both Canadian and U.S. investments
- Understand U.S. estate and gift taxes
- Explain the ramifications of renouncing U.S. citizenship

For full curriculum details and chapter overviews, visit www.knowledgebureau.com

e-Learning Registration Form

Everything you need to successfully achieve your certifications is included. Visit www.knowledgebureau.com for more details.

HOW TO REGISTER:
Phone: 1-866-953-4769 (toll-free) Fax: 204-953-4762
Online: www.knowledgebureau.com
Email: registrar@knowledgebureau.com

Identification (Complete one form per student)

Name	Company	Returning Student ID #
Address	City	Province
Postal Code	E-Mail	Referred by **RPAC**
Phone with Area Code	Fax	Current Designations/ Licensing

Select an Online Program – I Want to Earn My:

☐ CERTIFICATE – ANY 1 COURSE	(30 CE/CPD CREDITS)	DURATION: 4 MONTHS
☐ DIPLOMA – ANY 3 COURSES	(90 CE/CPD CREDITS)	DURATION: 1 YEAR
☐ DESIGNATION – ANY 6 COURSES	(180 CE/CPD CREDITS)	DURATION: 2 YEARS

GET STARTED:

1. Select your program
2. Select your payment plan
3. Make payment
4. Start today or at your convenience

☐ DFA–TAX SERVICES SPECIALIST™

Level 1: Diploma

- ☐ T1 Professional Tax Preparation – **Basic**
- ☐ T1 Professional Tax Preparation – **Intermediate**
- ☐ T1 Professional Tax Preparation – **Advanced**

Level 2: Designation

- ☐ T1 Professional Tax Preparation – **Proprietorships**
- ☐ Final Returns on Death of a Taxpayer
- ☐ Cross Border Taxation

FURTHER STUDY OPTIONS

☐ DFA–BOOKKEEPING SERVICES SPECIALIST™

Level 1: Diploma

- ☐ Basic Bookkeeping for Small Businesses
- ☐ Advanced Bookkeeping for Multiple Businesses
- ☐ Advanced Payroll

Level 2: Designation

- ☐ Advising Family Businesses
- ☐ Debt and Cash Flow Management
- ☐ Managerial Accounting

☐ MFA–BUSINESS SERVICES SPECIALIST™

Level 1: Diploma

- ☐ T2 Corporate Tax Preparation – **Micro Businesses**
- ☐ T2 Corporate Tax Preparation – **Small Businesses**
- ☐ Fundamentals of Succession Planning

Level 2: Designation

- ☐ Tax Planning for Corporate Owner-Managers
- ☐ Business Valuation for Advisors
- ☐ Accounting for Business Transitions

ADD-ON STUDY OPTIONS:

☐ Hard copy textbook (pay $75 printing, shipping, handling per course)

☐ Branch Office study group (2 or more people, save 10%)

Plan A: Tuition – Full Payment

Pay in full and save up to 30% when you enrol in the Designation Program. Taxes extra.	**Regular Tuition** $795/course	**Total Fees**
☐ Designation Program (6 courses – 1st course 50% off)	1 x $297.50 5 x $595	$3272.50
☐ Diploma Program (3 courses)	$665	$1995
☐ Certificate Program (1 course) (Alumni – Enrol for $665)	$795	$795

Payment Plan Worksheet

☐ **Full Payment** ☐ **EZ-Pay Instalment Plan**

Number of Courses: _______ A x fee from Plan A or B = B below

TOTAL TUITION FEES:	$_____________B
Hard Copy Textbook Shipping (A x $75)	$_____________C
SUBTOTAL (B + C)	$_____________D
GST/HST (885004713RT001)	$_____________E
TOTAL DUE (D + E)	$_____________F

Plan B: Tuition – EZ-Pay Plan

Total tuition includes finance fee Taxes extra. *Fees have been rounded	**Total Tuition**	**Monthly Payments** * Add taxes to 1st payment *
☐ Designation Program (6 courses – 1st course 50% off) Finance Fee: $55/course	$3600	18 x $200
☐ Diploma Program (3 courses) Finance Fee: $35/course	$2100	9 x $233
☐ Certificate Program (1 course) Finance Fee: $15/course	$810	3 x $270

Choose a Payment Method

☐ Credit Card ☐ Visa ☐ MC ☐ Amex

Card Number ______________________________

Expiry Date ___ /___ Amount $______________

Name on Card ______________________________

Signature ______________________________

☐ Cheque/ Money Order

Mail to: Knowledge Bureau
187 St. Mary's Road
Winnipeg, MB R2H 1J2

☐ I provide consent for Knowledge Bureau to store my contact information and inform me about future educational opportunities by: ☐email ☐ mail ☐phone