Open Your Own Income Tax Filing Business or Train Your Staff

DIFFERENTIATE YOURSELF

Earn Your Designation as a DFA - Tax Services Specialist™

ESPECIALLY FOR:

- Accounting and Tax Practitioners
- Tax and Estate Advisors
- Wealth Managers
- Insurance Advisors
- Financial Planners

FACULTY OF PERSONAL TAXATION   Your Potential is Limitless™

Only with:

Knowledge Bureau®
World-Class Financial Education

Gain the knowledge and skills you'll need to create tax advantages for your clients. Offer high-value advice on the best after-tax outcomes for multiple generations in client families.

BECOME A DISTINGUISHED FINANCIAL ADVISOR!

Earn your **DFA - Tax Services Specialist™ Designation** and expand on the role of a traditional tax preparer. Offer holistic tax filing and planning services to help families reduce taxes and supplement low income by taking advantage of all available tax credits.

TAKE A FREE TRIAL TODAY!

EVERYTHING IS INCLUDED:

> Personal course selection consultation and virtual campus orientation
> Lesson plans and study plans
> Personal instructor support by email
> Comprehensive Knowledge Journal
> EverGreen Explanatory Notes
  - Online Research Library
> Practical case studies using professional software
> Calculators and tools you can use immediately
> Testing and certification
> CE/CPD accreditation by various professionals

Knowledge Bureau is a widely respected education institute and publisher based in Canada. Our world-class education is innovative, informative, and in-depth, with an academic approach focused on knowledge, skill building and leadership.

Join thousands who have earned their credentials in the comfort and convenience of their own home or office, at their own pace. **Take a free trial and make a risk-free decision.**

"I am working on my second degree with the Knowledge Bureau, and I strongly recommend their courses for anyone in the financial services field. They have without a doubt, the most practical and effective approach to helping advisors serve their clients."

Chris Valentine,
DFA-Tax Services Specialist™ and MFA™-Retirement and Succession Services Specialist

For more details visit www.knowledgebureau.com or call toll-free:1-866-953-4769

TAKE A **RISK-FREE TRIAL**
knowledgebureau.com

ADVANCE YOUR CAREER WITH A DIPLOMA!

Complete 3 courses to earn a diploma as a Certified Personal Tax Practitioner™

More than a data entry clerk, the highly skilled **Certified Personal Tax Practitioner™** is a professional who understands CRA's EFILE, NETFILE and File My Return, but brings so much more to the client relationship: the precise application of all the tax preferences the client is entitled to because a thorough client interview was conducted.

1

Income Tax Filing Fundamentals

This course is designed for prospective tax filers with no experience. It starts with who and what is taxed. Prepare simple tax returns by the end of the first chapter! Then learn how to prepare returns for singles, families, students, retirees and investors. Along the way, know how to take advantage of the most common deductions and credits available.

Knowledge Journal:

- **Introduction to Canadian Tax**
- **Tax Preparation for Single Employees**
- **Tax Preparation for Employees with Variations**
- **Tax Preparation for Families - Married with Children**
- **Tax Preparation for Families - Marital Change**
- **Tax Preparation for Students**
- **Tax Preparation for Retirees**
- **Tax Preparation for Investors - Non-Registered Accounts**
- **Tax Preparation for Investors - Capital Property**
- **Basic Tax Planning**

2

Personal Tax Filing and Planning

Perfect for new owner-managers and new entrants into the tax filing market including new seasonal staff needed in a busy tax accounting office. Graduates are thoroughly trained on the latest tax changes using professional tax software in a case study approach. Research skills are honed in the comprehensive online research library known as EverGreen Explanatory Notes. Create "what if" scenarios for the upcoming year using the sophisticated tax estimator tools from the Knowledge Bureau Toolkit in between software updates.

Knowledge Journal:

- **Introduction to Income Taxation in Canada**
- **Using Software to Prepare the Return**
- **Filing the Return**
- **Low Income and Credit Filers**
- **Reporting Employment Income**
- **Claiming Employment Deductions**
- **Families and Children**
- **Reporting Investment Income**
- **Pensioners**
- **New for 2018 and Beyond**

3

Advanced Tax Filing and Planning

Fully updated to the latest federal Budgets, this comprehensive course delves deeply into the deductions, tax credits, and tax calculations on the personal tax return, with an emphasis on capital gains and losses, and registered and non-registered investment income sources. It overviews common and advanced client profiles, while sending students to the dynamic commentary in EverGreen Explanatory Notes.

As the title implies, it challenges more experienced practitioners and returning staff to busy tax practices.

Knowledge Journal:

- **Update and Review**
- **Family Filing**
- **Employees - Part 1**
- **Employees - Part 2**
- **Retirement**
- **Investors**
- **Asset Management**
- **Life Events**
- **Business Starts and Stops**
- **Death and Estate Planning**

"I am proud to say that I have achieved the Designation, and most of my staff are well on their way to either a diploma or a designation."

- Wayne Blackmere, DFA - Tax Services Specialist™

TAKE A **RISK-FREE TRIAL**
knowledgebureau.com

DIFFERENTIATE YOURSELF WITH A PROFESSIONAL DESIGNATION

To earn your DFA - Tax Services Specialist™ designation, complete the diploma program plus complete these 3 courses (6 courses in total)!

Be a trusted contributor to a multi-stakeholder approach in family wealth management. Earn your **DFA - Tax Services Specialist™** designation and offer high value advice on the best after-tax outcomes for multiple generations in a taxpayer's family.

4

Tax Accounting for Proprietorships

This course is designed to teach professional advisors tax preparation for proprietorships, using CRA's prescribed forms: Statement of Business or Professional Activities, Capital Cost Allowance statements, worksheets for reporting home office, automobiles, other assets, inventory control, and cost of goods sold. Students may use their own tax preparation software. For those without tax preparation software, student versions of Intuit's ProFile Software Suite, DR Tax's DT Max, and TaxCycle Suite are provided with the course.

Knowledge Journal:

- **Taxation of Income from a Proprietorship**
- **Reporting Requirements: GST/HST**
- **Claiming Business Expenses**
- **Transactions Involving Business Assets**
- **Home-based Businesses**
- **Hiring Human Resources**
- **Inventory-Based Businesses**
- **Disposing of and Replacing a Business**
- **Farming and Fishing Enterprises**
- **Professionals and Partnerships**

5

Tax Accounting on Death of a Taxpayer

This course deals comprehensively with the taxation of individuals at death. Gain a thorough understanding of how income and capital accumulations are taxed on final returns and learn strategies to minimize taxes.

Students will learn how to manage the new relationship with CRA when taxpayers die, as well as how each type of income is reported, options regarding elective returns, and opportunities to defer taxes. They'll learn how to claim all deductions and credits that are allowed on each return for the deceased and the surviving spouse, too.

It's an important professional service in demand in an aging demographic.

Knowledge Journal:

- **Death and Taxes**
- **Returns in the Year of Death**
- **Reporting Income**
- **Capital Assets**
- **Registered Accounts**
- **Claiming Deductions**
- **Non-Refundable Credits**
- **Refundable Credits**
- **The Estate**
- **Avoiding Probate Fees**

6

Fundamentals of Filing Trust Returns

This course introduces the types of trusts that may be created in Canada and how each of them is taxed. Students will learn how to prepare T3 returns as part of the case study exercises in the course. Case studies include the filing of trust returns, slips, and slip summaries for trusts.

The students will also learn how to optimize taxes payable on income earned by at trust by choosing to pay the taxes through the trust or allocating income to beneficiaries and having them pay the taxes on those allocations. The Trust Tax Estimator tool, provided with this course, will help you to minimize taxes on trust income.

Knowledge Journal:

- **Introduction to Trusts**
- **The T3 Return**
- **Identification**
- **Income of the Trust**
- **Deductions**
- **Dealing with Losses**
- **Allocation of Trust Income**
- **Calculation of Tax**
- **Filing**
- **Other Topics**

Your study plan is flexible and self-paced. Assume 30 hours for each course.
Take up to 3 months for one, 9 months for the diploma program and 18 months for the designation.

Knowledge Bureau®
World-Class Financial Education

REGISTRATION FORM - ONLINE STUDIES

registrar@knowledgebureau.com
TOLL FREE: 1.866.953.4769

ONLINE 24/7

IDENTIFICATION

Name (first/last): ______________________ **Student ID#:** ____________

Current Designations: ______________ **Company:** ______________

Address: ______________ **City:** ______________ **Province:** ________

Postal Code: ____________ **Email:** ______________

Home Phone: (____) __________ **Cell Phone:** (____) __________ **Work Phone:** (____) __________

Referred by: ______________ **Promo Code:** ______________

CHOOSE PROGRAMMING

To specialize select 4 courses in your preferred discipline plus two others from any program.

FACULTY OF PERSONAL/CORPORATE TAXATION

- ☐ **DFA - Tax Services Specialist™**
  - ☐ Income Tax Filing Fundamentals
  - ☐ Personal Tax Filing and Planning
  - ☐ Advanced Tax Filing and Planning
  - ☐ Tax Accounting for Proprietorships
  - ☐ Tax Accounting on Death of a Taxpayer
  - ☐ Fundamentals of Filing Trust Returns
- ☐ **MFA™ - Business Services Specialist**
  - ☐ Advising Family Businesses
  - ☐ Corporate Income Tax Fundamentals
  - ☐ Tax Planning for Incorporated Professionals
  - ☐ Tax Planning for Corporate Owner/Managers
  - ☐ Business Valuation for Advisors
  - ☐ Cross Border Taxation

* or choose any one course in any program

FACULTY OF BUSINESS ACCOUNTING

- ☐ **DFA - Bookkeeping Services Specialist™**
  - ☐ Bookkeeping for Small Businesses
  - ☐ 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

FACULTY OF RETIREMENT PLANNING

- ☐ **MFA™ - Retirement and Succession Services Specialist**
  - ☐ Debt and Cash Flow Management
  - ☐ Tax Strategies for Investors
  - ☐ Fundamentals of Succession Planning
  - ☐ Tax-Efficient Retirement Income Planning
  - ☐ Portfolio Risk Management in Retirement
  - ☐ Planning with Trusts

FACULTY OF MANAGEMENT

- ☐ **RWM™ - Real Wealth Manager Program**
  The Pre-Eminent Standard in Wealth Management Services
- ☐ **MFA™ - Executive Business Growth Specialist**
  - ☐ Business Leadership, Culture and Continuity
  - ☐ Strategic Business Planning
  - ☐ Operation Foundations to Support Business Growth
  - ☐ Business Law & Contracts
  - ☐ Marketing Mastery for Business Builders
  - ☐ Executive Business Builder Retreat *

FACULTY OF STRATEGIC GIFT PLANNING

- ☐ **MFA-P™ - Philanthropy Services Specialist**
  - ☐ Introduction to Strategic Philanthropy
  - ☐ Understanding the Charitable Sector
  - ☐ Integrating Gift Planning Vehicles in Planning

TUITION and STUDY PLAN

BONUS: SAVE $50 MORE WHEN YOU REGISTER BY JUNE 15

EZ-PAY PLAN ($39/course instalment fee)

	Study Period:	Regular Tuition Rates:	Multiple Course Discount:	Savings:	Cost Per Course:	First Payment	Monthly Installments
TECHNICAL SKILLS MASTERY:							
☐ **DESIGNATION** 6 courses	18 months	$4,770	$3,570	25%	$595	1 x $384	12 x $285
☐ **DIPLOMA** 3 courses	9 months	$2,385	$2,085	12%	$695	1 x $395	6 x $302
☐ **CERTIFICATE** 2 courses	6 months	$1,590	$1,390	12%	$695		
☐ **CERTIFICATE** 1 course (ALUMNI)	3 months	$795	$745	6%	$745		
☐ **CERTIFICATE** 1 course (NEW STUDENT)	3 months	$795	N/A	N/A	$795		
BUSINESS SKILLS MASTERY:							
☐ MFA™- Executive Business Growth	18 months	$4,770	$3,570	25%	$595	1 x $384	12 x $285
☐ MFA-P™- Philanthropy	9 months	$995	N/A	N/A	$995	1 x $371	2 x $332
☐ RWM™- Real Wealth Manager	9 months	$995	N/A	N/A	$995	1 x $371	2 x $332

PAYMENT OPTIONS:

☐ **FULL PAYMENT** $ __________

☐ **EZ-PAY PLAN** (1st Payment Only Now, See Above) $ __________

☐ **BONUS - ENDS JUNE 15** $ (50.00)

SUBTOTAL $ __________

☐ **HARD COPY Textbook $125 per course** $ __________

GST/HST (885004713RT001) $ __________

TOTAL DUE NOW: $ __________

PAYMENT METHOD:

☐ **Credit Card** ☐ **Visa** ☐ **MasterCard** ☐ **Cash/Money Order**

Card Number: ______________________

Expiry Date: ______ / ______ **Amount:** $ __________

Name on Card: ______________________

Signature: ______________________

For Curriculum, Academic and Refund Policies, and Procedures and Technology Specs go to: www.knowledgebureau.com/ index.php/about-us/knowledge-bureau-policies/

☐ **I agree to receive course updates, scheduling, communications, certification and transcripts from Knowledge Bureau.**