Prepare Your Talents for the Future

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FACULTY OF MANAGEMENT	FACULTY OF PERSONAL AND CORPORATE TAXATION	FACULTY OF RETIREMENT PLANNING
FACULTY OF BUSINESS ACCOUNTING	FACULTY OF STRATEGIC GIFT BUILDING	CERTIFICATE AND DIPLOMA OPTIONS

Enrol on the Reverse or Find Out More at www.knowledgebureau.com

Contact Us

Toll Free 1-866-953-4769
Email reception@knowledgebureau.com

Knowledge Bureau
World-Class Financial Education™

Distinguished Financial Advisor Designation Programs

To Assist Individual Taxpayers and Investors

"Knowledge Bureau courses have enabled me to expand my business. The tools and calculators are excellent in being able to help clients understand their tax and finances. I would recommend these courses to anyone in the financial services field!"
Joanne T., DFA-Tax Services Specialist™, Yukon

TECHNICAL SKILLS

DFA - Tax Services Specialist™

Income Tax Filing Fundamentals
This course is designed for prospective professional tax practitioners who have no experience with filing personal tax returns and starts with an introduction to income tax and filing in Canada.

Personal Tax Filing and Planning
This course introduced a proven process for consistently accurate T1 tax filing services with a professional client interview and documentation management system.

Advanced Tax Filing and Planning
This comprehensive course covers the details behind the deductions, tax credits and tax calculations on the personal tax return.

You have achieved:

Certified Tax Practitioner Diploma

Tax Accounting for Proprietorships
This course provides experience with a broad range of business profiles including sole proprietors, partnerships, farmers, fishers, and professionals.

Tax Accounting on Death of a Taxpayer
In an aging demographic more final returns will be filed in the future; learn how to minimize taxes at death and advisor executors of their responsibilities.

Fundamentals of Filing Trust Returns
Learn to prepare T3 returns for true-to-life scenarios, including new GREs (Graduate Rate Estates).

You have achieved:

DFA-Tax Services Specialist™ Designation

Custom-design Your Program: Choose four courses under your preferred discipline plus two others from any discipline.

DFA - Bookkeeping Services Specialist™

Bookkeeping for Small Businesses
Become the certified professional who knows how to use accounting software to set up a proper double entry bookkeeping system for a small business.

Advanced Payroll for Small Business
This course will provide detailed instruction on managing a multi-faceted payroll with emphasis on various compensation types including taxable and tax-free benefits.

Debt and Cash Flow Management
Debt is the number one financial issue in Canada today. This course will help students identify the types of debt that must be paid as a result of various life events and prioritize the repayment in a formal plan.

You have achieved:

Certified Bookkeeping Diploma

Managerial Accounting and Budgeting
This course instructs the student to use information within bookkeeping systems to assist business owners and their advisors to make sound decisions.

Accounting for Multiple Business Profiles
The student will learn to manage the bookkeeping functions for a variety of companies to deliver financial results and analysis with confidence.

Accounting for Business Growth and Transition
The objective of this course is to prepare professionals to anticipate and provide the financial information required for business growth and transition.

You have achieved:

DFA-Bookkeeping Services Specialist™ Designation

Study at Your Own Pace. Each certificate course takes about 30 hours, and you can take up to 3 months to finish each course. Start anytime.

Canada's Leading Educational Programs in the Tax and Financial Services.

Please note we can help you customize course selections to better suit your practice.

To Assist Private Family Business

"The training and insights gained through completing the MFA program have vastly expanded the level of services that I am now confidently able to provide. The Knowledge Bureau's toolbox simplifies the complex, allowing deeper, more meaningful conversations with clients." Rick T., CFP, CLU, ChFC, MFA, CHS, Ontario

TECHNICAL SKILLS

MFA™ - Business Services Specialist

Advising Family Businesses
It's widely accepted that many small businesses in Canada are led by individuals that are in or near retirement age. Learn the secrets to helping owners begin to plan astutely for the future of the business.

Corporate Income Tax Fundamentals
This course teaches the preparation of T2 returns and personal/corporate tax planning for small to medium sized businesses that are owned and operated by professionals, with a special focus on financial advisors and medical practitioners and new tax reforms.

Tax Planning for Incorporated Professionals
Learn to prepare a T2 for your small business clients, and gain a sound understanding of the business issues and tax options that underlie the taxation of corporate income.

You have achieved:

Certified Business Tax Diploma

Tax Planning for Corporate Owner/Managers
Acquire the knowledge and skills required to provide advice throughout the year with a view to minimizing the total amount of income taxes paid by the family. You will also apply recent personal/corporate tax changes to the family's best benefit using true-to-life case studies.

Business Valuation for Advisors
This practical course will help advisors understand how businesses are valued in order to better guide this stressful process for business owners.

Cross Border Taxation
Advisors must have a deeper knowledge of cross border issues when clients have properties in the U.S. and abroad. Learn using a practical approach.

You have achieved:

MFA™-Business Services Specialist Designation

Everything is Included: Your Knowledge Journal and Lesson Plans, Short Answer Quizzes, Cases Studies and Professional Software.

MFA™ - Retirement and Succession Services Specialist

Debt and Cash Flow Management
Debt is the number one financial issue in Canada today. This course will help students identify the types of debt that must be paid as a result of various life events and prioritize the repayment in a formal plan.

Tax Strategies for Investors
Learn rules using tax-free, tax-deferred and taxable income. Use a series of assessment tools to achieve more tax-efficient investment results managing tax-free zones, clawback zones and marginal tax rates.

Fundamentals of Succession Planning
Identify the key financial issues that business leaders/potential successors should consider in succession planning, and the impact that their decisions have on their future financial position.

Certified Wealth Advisor Diploma

Tax-Efficient Retirement Income Planning
This comprehensive course will teach you to plan the layering of various income sources with tax efficiency to meet retirement goals.

Portfolio Risk Management in Retirement
Canadians are living longer. This takes retirement income planning into a much longer period in which a focus on continued accumulation and investing is as important as tax-efficient withdrawal of funds.

Planning with Trusts
Planning with trusts has changed in recent years. Know the basics of how trusts are used in estate planning to better collaborate with other professionals with your client.

You have achieved:

MFA™-Retirement and Succession Services Specialist Designation

Personalized Instruction, Too. Feel free to use the "Help" button for email support from caring, expert instructors. You are never alone - we are happy to help!

The RWM™ (Real Wealth Manager) Program

BUSINESS SKILLS

NEW! THE RWM™ (REAL WEALTH MANAGER) CERTIFICATION MARK IS THE PRE-EMINENT STANDARD IN WEALTH MANAGEMENT SERVICES. . .

Comprehensive training and tools in client-centric wealth management services are presented to enable you to position yourself as the primary advisor of a multi-stakeholder team of professionals and family members. Ideal for advisors practicing in the tax and financial services industries who wish to embellish on their current value proposition. Features 15 professional wealth management tools and calculators.

11 modules, 30 CE hours, take up to 3 months. For application form and to enrol online see www.knowledgebureau.com

The MFA™-Executive Business Growth Specialist

BUSINESS SKILLS

IS YOUR BUSINESS FUTURE READY?

Designed especially for the professional who wants to assist the small business owner to grow. Scaling up an existing owner-managed firm is a difficult process for most entrepreneurs.

The Executive Business Growth Specialist is for:

- **Energetic Innovators** who want to help their clients embrace change, reposition their firms and build new high value, market-driven enterprises.
- **Business Builders** well on a defined path but who would benefit from new business challenges, personal coaching and a vibrant business owner network.
- **Owner-managers** who want to join other dynamic business leaders at the annual Business Builder Retreat.
- **Entrepreneural Employees** who want to take the leap and lean in to their dream of becoming an owner-manager themselves.
- **Anyone** who needs foundational knowledge on business planning and structure development to support business growth plans.

To enrol online see http://www.knowledgebureau.com/index.php/programs-courses/designation-programs/

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

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Knowledge Bureau

REGISTRATION FORM

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 AND 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 / EZ-PAY PLAN

	Study Period:	Regular Tuition Rates:	Multiple Course Discount:	Savings:	Cost Per Course:	EZ-PAY PLAN First Payment*	EZ-PAY PLAN Monthly Instalments
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	3 months	$995	N/A	N/A	$995	1 x $371	2 x $332

* $39/course instalment fee

PAYMENT OPTIONS:

☐ **FULL PAYMENT** $ ____________

☐ **EZ-PAY PLAN** (1st Payment, taxes extra) $ ____________

SUBTOTAL $ ____________

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

GST/HST (885004713RT001) $ ____________

TOTAL DUE NOW: $ ____________

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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.**