

Be a Distinguished
Financial Advisor
– Tax Services
Specialist™



Knowledge Bureau®
Excellence in Financial Education

WANT TO OPEN YOUR OWN INCOME TAX PREPARATION BUSINESS OR TRAIN YOUR STAFF?



Take the first step towards your greater potential with a free trial in the prestigious Distinguished Financial Advisor (DFA) designation program. Build your business, attract new customers, or differentiate yourself as a valuable employee in a competitive market.

A SPECIAL OFFER FOR YOU

Everything is included. Learn at your own pace plus enjoy access to the full support you need to complete your courses at superior professional standards. You'll benefit from:

- > individual study plans and Knowledge Journal
- > online lessons, quizzes and case studies
- > valuable professional software, calculators and tools that you can use now and in your business
- > easy access to a personal instructor who will answer any questions you may have by email
- > testing and an accreditation that will differentiate you from competition
- > broadly recognized CE/CPD credits

Join thousands professionals who have discovered that the best way to make more, is to know more through Knowledge Bureau – Canada's premiere online financial educator. Just 6 courses - 180 hours of study - is all it takes!

Check out attached application forms and deadlines for the best savings

ADVANCE YOUR CAREER WITH A DIPLOMA!

Complete 3 courses (90 hours) to earn a diploma
as a Certified Personal Tax Practitioner™

Gain the skills you need to get a job in the tax accounting industry or build your own professional personal and corporate tax return practice as a Certified Personal Tax Practitioner™. This diploma also offers business owners an easy and affordable way to train new and existing staff and increase profits.

1

T1 Professional Tax Preparation – Basic

Eliminate costly errors that can negatively affect your business. This course is perfect for rookie tax preparers and provides a proven process for preparing consistently accurate T1 returns within a professional client interview and documentation management system. You'll be introduced to income tax and software use plus be able to advance your career by learning how to:

- > Understand the business of filing tax returns
- > Prepare five key profiles starting with credit files
- > Prepare taxes for employment income
- > Claim employment deductions
- > Factor in families and children
- > Report investment income
- > Prepare returns for pensioners
- > Learn about what's new for the upcoming tax year

2

T1 Professional Tax Preparation – Advanced

If you're an experienced tax practitioner, you may be working with high net worth families. Fulfilling the needs of this educated market demands a high level of skill to manage advanced personal tax scenarios. Take your skills to the next level with a thorough tax update and research review plus an in-depth look at:

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

The case studies and quizzes are a fantastic idea. They really give you an idea of real case scenarios and point out where improvement is needed. EverGreen Explanatory Notes is a great research tool with easy to access information. Student support is fantastic!
Melissa V H., ON

3

T1 Professional Tax Preparation - Proprietorships

If you work with clients who operate as an unincorporated sole proprietorship or partnership, this course will give you the skills you need to:

- > 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
- > Explore tax variations for farmers and fishing businesses
- > Understand how to prepare returns for professionals and partnerships

This course is very valuable to any financial planner. They will learn material they only 'thought' they knew. Any CFP will learn something valuable in this course.
James H., ON

DIFFERENTIATE YOURSELF WITH A PROFESSIONAL DESIGNATION

To earn your DFA designation, complete the 3 diploma programs plus complete these 3 courses (180 hours in total)!

Looking for a way to stand out in the competitive tax services industry and attract more business? Earn your DFA-Tax Services Specialist™ designation to advance your business or career, retain your clients and keep up with the ever-changing world of taxation. You'll be able to provide a superior level of service that will continue to pay off throughout your career.

4

Final Returns on Death of a Taxpayer

How do you get the best tax results when a family member passes away? You'll learn the tools and professional skills you'll need to guide the conversation throughout the tax planning process and get an in-depth understanding of:

- > Federal and provincial tax law at the time of death of a taxpayer
- > 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

This is the second of my courses, and I am enjoying not only the format but the content. Very well done - thank you Brenda A.

5

Cross Border Taxation

With more clients owning offshore assets and assuming partial residency or U.S. connections including citizenship, this course will help you competently address cross-border taxation issues and allow you to:

- > 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

6

Tax Strategies for Financial Advisors

Tax is a trigger for affluent families. Learn how to create a strategy and a tax efficient investment income planning process to preserve, grow and transition wealth tax efficiently to the next generation, throughout the lifecycles of individuals within a family. You'll also learn how to:

- > Split investment income with family members and avoid tax erosion of the capital at transition times.
- > Understand recent tax changes relating to a variety of investment opportunities, strategies and ordering rules using tax-free, tax-deferred and taxable income.
- > Proficiently use a series of assessment tools around which to structure the client's pre- and post-tax investment income needs and monitor ongoing results.
- > Learn how to "manage the tax return" by being familiar with tax free zones, clawback zones and marginal tax rates.
- > Provide specific investment income planning approaches for a variety of taxpayer profiles.



Registration Form: Online Courses

TOLL-FREE: 1-866-953-4769 EMAIL: registrar@knowledgebureau.com

For full curriculum details and online registration see knowledgebureau.com

STEP 1: Identification

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

Maximum Study Time:

Each Certificate Course: Take up to 4 months

Diploma Program: Take up to 1 year

Designation Program: Take up to 2 years

STEP 2: Choose Your Courses

☐ DFA-Tax Services Specialist™

- ☐ T1 Professional Tax Preparation – Basic
- ☐ T1 Professional Tax Preparation – Advanced
- ☐ T1 Professional Tax Preparation – Proprietorships
- ☐ Final Returns on Death of a Taxpayer
- ☐ Cross Border Taxation
- ☐ T2 Corporate Tax Preparation for Micro Businesses

☐ DFA-Bookkeeping Services Specialist™

- ☐ Basic Bookkeeping for Small Businesses
- ☐ Advanced Bookkeeping for Multiple Businesses
- ☐ Advanced Payroll
- ☐ Advising Family Businesses
- ☐ Debt and Cash Flow Management
- ☐ Managerial Accounting

☐ MFA-Business Services Specialist™

- ☐ T2 Corporate Tax Preparation for Micro Businesses
- ☐ T2 Corporate Tax Preparation for Small Businesses
- ☐ Fundamentals of Succession Planning
- ☐ Tax Planning for Corporate Owner-Managers
- ☐ Business Valuation for Advisors
- ☐ Accounting for Business Growth and Transition

☐ MFA-Real Wealth Management Specialist™

- ☐ Elements of Real Wealth Management
- ☐ T1 Professional Tax Preparation – Basic
- ☐ T1 Professional Tax Preparation – Advanced
- ☐ Tax Strategies for Financial Advisors
- ☐ Business Valuation for Advisors
- ☐ Final Returns on Death of a Taxpayer

☐ MFA-Retirement Income Specialist™

- ☐ Elements of Real Wealth Management
- ☐ Advanced Tax-Efficient Retirement Income Planning
- ☐ Insurance Strategies for the Small Business Owner
- ☐ Portfolio Risk Management in Retirement
- ☐ Cross Border Taxation
- ☐ Tax Strategies for Financial Advisors

☐ MFA-Succession and Estate Planning Specialist™

- ☐ Fundamentals of Succession Planning
- ☐ Advising Family Businesses
- ☐ Insurance Strategies for the Small Business Owner
- ☐ Business Valuation for Advisors
- ☐ Final Returns on Death of a Taxpayer
- ☐ Investment Strategies in Charitable Giving

These courses are newly updated to the latest Budget, Tax and Economic changes.

NOTE: It is possible to vary course selections.
Call us for a consultation.

*The MFA™, DFA-Tax Services Specialist™ and DFA-Bookkeeping Services Specialist™ are registered certification marks of Knowledge Bureau™

STEP 3: Choose Your Payment Option

Plan A: Tuition – Full Payment: SAVE THE MOST!

Pay in full and save over 25% when you enrol in the Designation Program. Taxes extra.	Regular Tuition \$795 SAVE until March 15:	Total Fees	Plan #
<input type="checkbox"/> Designation Program 6 courses - 180 CE/CPD credits	6 x \$595	\$3570	A
<input type="checkbox"/> Diploma Program 3 courses - 90 CE/CPD credits	3 x \$665*	\$1995	B
<input type="checkbox"/> Certificate Program One course at a time - 30 CE/CPD credits	1 x \$795	\$795	C
<input type="checkbox"/> Hard Copy Textbook	# Courses x \$85	\$ _____	D

*Alumni—use this rate for your next course, unless you continue in the Designation Program.

Plan B: Tuition – EZ-Pay Student Financing

Note: Hard Copy – Pay in Full Only (see D above)	Total Tuition plus finance fee of \$25 per course	Pay Now	Plan #	Monthly Payments *Add taxes to 1st payment
<input type="checkbox"/> Designation Program	\$3720		E	12 x \$285.50
<input type="checkbox"/> Diploma Program	\$2070		F	6 x \$296.00
<input type="checkbox"/> Certificate Program	\$820		G	2 x \$262.50

Note: Taxes Extra

Payment Plan Worksheet

☐ Plan A: Tuition - Full Payment

☐ Plan B: Tuition - EZ-Pay Student Financing

FULL PAY TUITION FEE PLAN – PAY NOW: (A, B, C, D)	\$ _____
EZ-PAY PLAN (1st payment only): (E, F, G)	\$ _____
SUBTOTAL	\$ _____
GST/HST (885004713RT001)	\$ _____
TOTAL DUE NOW:	\$ _____

Monthly charges will begin on the 15th; there is a \$45 fee for credit card declines.
All taxes extra. For Refund Policy, visit www.knowledgebureau.com

Choose a Payment Method

☐ Cheque/Money Order

☐ Credit Card

☐ Visa

☐ MasterCard

☐ Amex

Card Number _____

Expiry Date _____

/

Amount \$ _____

Name on Card _____

Signature _____

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

☐ I agree to receive update notifications by Knowledge Bureau Report, email, invitations to workshops to support my studies, and transcripts on my progress as a student with Knowledge Bureau.



EDUCATIONAL CALENDAR

PLAN YOUR PATH TO PROFESSIONAL DESIGNATION

As a Master Financial Advisor (MFA) or Distinguish Financial Advisor (DFA)

Register online at
www.knowledgebureau.com
or call 1-866-953-4769

Want
In-Class
Interaction?
Consider a
"Blending Learning" Option

WINTER SEMESTER ONLINE -
Continuous intake; start anytime.
Take up to four months to complete one 30
hour online course.

December 15 to March 15

Each
course
30 CE
credits

Required: 180 hours to designate. Choose either
6 online courses; or "blended learning": 4 courses &
6 workshops or 5 courses & 2 DACs.

WINTER WORKSHOP
Deadline: December 31

January 20 > Winnipeg
January 21 > Calgary
January 22 > Vancouver
January 25 > Toronto

Earn
10 CE
credits

Topic: Advanced Personal Tax Update for Tax Advisors,
Bookkeepers and Financial Planners.

SPRING SEMESTER ONLINE -
Continuous intake; start anytime.
Save on tuition by the deadline.

March 15 to June 15

Each
course
30 CE
credits

Choose Your Next Online Course in the DFA -Tax or
Bookkeeping Services Specialist™ or MFA™ Program.
Deadline: June 15.

SPRING WORKSHOP
Deadline: May 15

May 24 > Winnipeg
May 25 > Calgary
May 26 > Vancouver
May 31 > Toronto

Earn
10 CE
credits

Topic: 2016 Federal Budget Update, and Tax Efficient
Retirement and Estate Planning.

SUMMER SEMESTER ONLINE -
Continuous intake; start anytime.
Save on tuition before deadline.

June 15 to September 15

Each
course
30 CE
credits

Choose Your Next Online Course: DFA -Tax or
Bookkeeping Services Specialist™ or MFA™ Program.
Deadline: September 15.

FALL WORKSHOP
Deadline: October 15

October 25 > Winnipeg
October 26 > Calgary
October 27 > Vancouver
November 2 > Toronto

Earn
10 CE
credits

Topic: High Net Worth, Family and Business Planning.

FALL SEMESTER ONLINE -
Continuous intake; start anytime.
Save on tuition before deadline.

September 15 to December 15

Each
course
30 CE
credits

Choose Your Next Online Course: DFA -Tax or
Bookkeeping Services Specialist™ or MFA™ Program.
Deadline: December 15.

**13TH ANNUAL
DISTINGUISHED
ADVISOR CONFERENCE (DAC)**

November 6 to November 9

Earn
15 CE
credits

Theme: SOAR HIGHER:
PLAN FOR YOUR GREATER POTENTIAL

For a free personal educational consultation, call toll free 1-866-953-4769 or
registrar@knowledgebureau.com. See course curriculum details at
www.knowledgebureau.com.

*The MFA™ and DFA-Tax Services Specialist™, DFA-Bookkeeping Services Specialist™ are registered certification marks of Knowledge Bureau™.



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