Earn a Valuable Designation as a Tax Services Specialist™

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

Only with:

**Knowledge Bureau®**
Excellence in Financial Education

Build Your Reputation for Excellence and Register by Dec 15 for Tuition Savings !

## MAKE A GREAT INVESTMENT IN YOURSELF!

Qualified professional tax specialists are in high demand, especially if they have advanced tax knowledge and new technology skills. Take a bold step to a new career or business venture:
Earn Your DFA - Tax Services Specialist Designation.

**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 – The Online Research Library
- Practical Case Studies using Professional Software
- Calculators and tools you can use immediately
- Testing and certification
- CE/CPD accreditation by various professional bodies

**JOIN THOUSANDS OF GRADUATES:**

Knowledge Bureau is a national educational institute focused on excellence in professional development in the tax, accounting and financial services.

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.

"The DFA - Tax Services Specialist stream of courses teach not only the practical application of tax legislation and interpretation, but also what is probably the most advantageous skill set: *How to Think*. The courses give you the information required, but not on a platter. You need to develop the ability to think in order to apply the lessons learned in a practical manner." **Alan R.**

For more details visit www.knowledgebureau.com or call Toll-Free:1-866-953-4769, Fax: 1-204-953-4762

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

# 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.

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### 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

"Well planned, well delivered, and thought provoking. The course content is excellent. All aspects covered are certainly used in the tax preparation industry."
Karen S., SK

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### 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

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### 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

"Each and every course further refined my skills and presented opportunities to explore situations that I might not otherwise have experienced."
Cynthia K., ON

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

# DIFFERENTIATE YOURSELF WITH A PROFESSIONAL DESIGNATION

## To earn your DFA designation, complete the diploma program 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.

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### 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., ON

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### 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

"Excellent course. Well written, easy to understand and full of tremendous information. I would recommend this course to other financial planners."
Salpy B., ON

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### NEW! T3 Basic Tax Preparation

With all the changes in the mechanics of how trusts function, including the introduction of Graduated Rate Estate (GRE), this course will provide you with professional skills necessary to include this service in your practice.

This course introduces the types of trusts that can 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. Students will also learn how to optimize taxes payable on income earned by the trust, choosing to pay taxes through the trust or allocating income to beneficiaries and having them pay taxes on those allocations.

An understanding of T1 Tax Preparation is recommended.

Upon completion of this course, students will be familiar with the taxation of various trusts and be able to prepare T3 trust returns and prepare T3 slips for beneficiaries.

Another new cutting edge course from Knowledge Bureau.