Knowledge Bureau®
Excellence in Financial Education
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Financial Designations
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DFA - Distinguished Financial Advisor™

- **Tax Services Specialist™**
- **Bookkeeping Services Specialist™**

MFA - Master Financial Advisor™

- **Business Services Specialist™**
- **Retirement and Estate Services Specialist™**

RWM - Real Wealth Manager Program™

The Executive Business Builder Program™

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- Personal course selection consultation and virtual campus orientation
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- CE/CPD accreditation by various professional bodies

Call for friendly assistance **1.866.953.4769**
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Distinguished Financial Advisor Designation Programs

"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™

Introduction to Personal Tax Preparation

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

Intermediate Personal Tax Preparation

This course teaches new tax professionals how to prepare audit-proof tax returns in order to benefit the entire family unit, including investors.

Advanced Family Tax Preparation

Learn how to prepare returns for more sophisticated profiles including commission salespeople, proprietors, higher net worth investors, and retirees.

T1 Professional Tax Preparation Proprietorships

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

Final Return 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.

T3 Basic Tax Preparation

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

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

DFA - Bookkeeping Services Specialist™

Intro to 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.

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.

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.

Master Financial Advisor Designation Programs

"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., MFA, CFP, CLU, CH.F.C., 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.

T2 Tax Preparation for Small Business
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.

T2 Tax Preparation for Professional Businesses
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.

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.

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.

One Optional Course
For curriculum go to www.knowledgebureau.com

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

MFA - Retirement and Estate Services Specialist™

Debt and Cash Flow Management
This course will discuss the effect of debt on wealth management, how to provide financial assessments and prioritize repayments of a variety of debt categories.

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.

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.

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.

Portfolio Risk Management in Retirement
Using a defined process for goal setting and financial assessments, explain the most powerful financial concepts to predict and evaluate risk and return in the retirement period.

Use of Trusts in Tax and Estate Planning
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.

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 NEW

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 Executive Business Builder Program™ NEW

BUSINESS SKILLS

IS YOUR BUSINESS FUTURE READY?

Introducing a brand new educational program for practice leaders and owner-managers. Take your business to the next level and grow your personal leadership potential with 6 online courses and two mentorship opportunities in this new and innovative business development program.

The Executive Business Builder Program is for:

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

6 courses, 30 CE hours each, take up to 18 months. For application form and to enrol online see http://www.executivebusinessbuilder.com/

*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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