Earn a Valuable Designation as a Business Services Specialist™

BUILD A REPUTATION FOR EXCELLENCE WITH SMALL TO MEDIUM-SIZED FIRMS BY SHARPENING VALUATION, TRANSITION AND TAX KNOWLEDGE.

Only with:

Knowledge Bureau®
Excellence in Financial Education

Build Your Reputation for Excellen
and Register by Sept 15
for Tuition
Savings !

MAKE A GREAT INVESTMENT IN YOURSELF!

Qualified business services 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 MFA-Business 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 courses of the MFA designation program are immediately applicable in real life situations and very helpful in advising clients. Thank you for helping me do important work."

Lori C., ON

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

DIFFERENTIATE YOURSELF WITH A DIPLOMA

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

Understand family-owned enterprises throughout the lifecycle of the business – from start-up, to mid-term growth through to a successful transition to the next business owner. That insight requires a firm understanding of financial statements and the T1 and T2 tax returns – critical skills if you want to be precise about insurance and investment needs.

1

Advising Family Businesses

Learn how to successfully work within the unique dynamic of family-operated businesses and discover how to overcome obstacles in financial decision-making for greater profitability. You'll also learn how to:

> Re-define records management to benefit from a longer-term focus

> Create a multi-generational approach that includes retirement, tax, and business transactions in compensation planning

> Set goals for the family, business, and shareholders with a priorities pyramid

> Layer retirement income for owner-managers and their spouses

> Set benchmarks for share structure and exit strategies

> Recognize roadblocks to implementation before they occur

> Develop skills to quarterback an advisor team

> Maximize your value to the client with a longer-term insight into the life cycle of the business.

"I will recommend this course to friends, especially those who deal with family businesses. It is a great course. It shows various models and techniques which may tackle complex issues and problems effectively."
Maria C., ON

2

Tax Planning for Corporate Owner-Managers

One of the key issues faced by the owner/manager of a private business is how to best manage his or her compensation to maximize the amount of after-tax income available to the family. Equip yourself with a broad understanding of recent tax changes as well as planning options available for the family business and family members.

> Understand the various components of compensation planning including the optimal salary, dividend and bonus mix that will enable families to pay the least tax through income splitting and income averaging.

> Acquire the knowledge and skills required to provide advice throughout the year to plan tax efficiencies that enable greater wealth accumulation by the family.

> Apply recent personal/corporate tax changes to the family's best benefit using true-to-life case studies.

``This was an excellent course, one of the best I have taken in the MFA Designation Program. The course was very challenging and the information contained was valuable to me in my practice.``
Heather M., NS

3

T2 Corporate Tax Preparation for Small/ Medium Enterprises

Help your clients to minimize tax and identify new opportunities by learning about the business issues and tax options that underlie the taxation of corporate income.

> Use basic tax planning concepts, both for the corporation and its shareholders

> Print out the T2 jacket

> Complete the Identification Section,the GIFI, and the S1, S2, S3, S4, S6,S7, S8, S10

> Prepare case studies in T2 preparation

> Assist owner-managers with simple planning scenarios.

``My main objectives with this course were to upgrade my tax expertise, learn new topics, and help my clients to do their taxes with confidence. I liked everything about this course – it is challenging with great rewards.``
Necky T., BC

``The MFA was able to deliver ... increasing my confidence when consulting with advisors on how help their clients meet their financial goals.`` Tony Bosch

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

ADVANCE YOUR CAREER WITH A PROFESSIONAL DESIGNATION

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

Looking for a way to stand out in the tax industry and attract more business? Earn your MFA-Business Services Specialist™ designation to advance your business or career and guide clients through succession planning, business valuations and transitions. You'll be able to provide a superior level of service that will continue to pay off throughout your career.

4

Fundamentals of Business Succession Planning

Learn the fundamentals of succession planning so that you can assist clients in developing a succession plan for their business.

> Understand the importance of the planning process and how routine planning in the business is an important precursor for succession planning

> Differentiate and understand the relationship between succession planning for key positions in the business and for the business as a whole

> Coach business leaders/potential successors as to the role and responsibility issues that they should consider in terms of personal implications

> Identify the key financial issues that business leaders/potential successors should consider when conducting succession planning, and the impact that the decisions they make can have on their future financial position.

``Thank you putting this course together. I've been looking for a course like this for a long time, and I'm very excited, inspired and eager to move onto my next course.``
Phyllis B., ON

5

Business Valuation for Advisors

Become a more valuable resource to your clients by learning the fundamentals of business valuation so that you can assist clients in facing various types of business transactions, including mergers, transfer of an ownership position, sale of business, or raising capital.

> Understand the notion of value and the relationship between business transactions and value.

> Differentiate between company specific and market based approaches to estimating value, as well as the strengths and limitations of these approaches.

> Identify situations that could impact value, including qualitative factors and market/industry developments.

> Assist clients with the preparation stage of undertaking a business transaction, including corporate improvements to enhance value and "right time to sell" considerations.

``Great course for anyone looking to understand the importance of a business evaluator and the process that they use. I found the material to be well written and the flexibility of the course was a plus - to work at your own pace.``
Todd W., AB

6

Accounting for Business Transition

In the case of growing companies, it's critica to understand where the business is at, the resources it needs to support future growth, potential gaps, and how they could be addressed.

> Learn to define the components of compensation, including salary, dividends, and bonuses, their tax attributes and the opportunities and/or constraints imposed by recent income tax.

> 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.

> Identify and accumulate the information typically provided when a business is sold

> Understand the due diligence process and the financial information to be accumulate and assessed in evaluating the purchase of a business.

``I find this course very useful especially for those who serve the small business owners. The thing I liked best about this course was that there are many small cases and examples which really help me understand the concepts.``
Maria C., ON

Registration Form: Online Courses

toll free: 1-866-953-4769 email: registrar@knowledgebureau.com

Contact us for curriculum details and blended learning options in-class & online.

IDENTIFICATION:

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

PROGRAMMING: Choose Your Area of Specialization and Select Courses

Specialize in Work with Families:

☐ **DFA-Tax Services Specialist™**
Learn Professional Personal Tax Preparation

- ☐ 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
- ☐ T3 Basic Tax Preparation *

☐ **MFA-Retirement and Estate Services Specialist™**
Learn Tax Efficient Wealth Management Skills

- ☐ Tax Strategies for Financial Advisors
- ☐ Tax–Efficient Retirement Income Planning
- ☐ Portfolio Risk Management in Retirement
- ☐ Insurance Strategies for Small Business
- ☐ Use of Trusts in Tax & Estate Planning
- ☐ Investment Strategies in Charitable Giving

Specialize in Work with Family Businesses:

☐ **DFA-Bookkeeping Services Specialist™**
Learn Professional Financial Transactions Reporting

- ☐ Basic Bookkeeping for Small Businesses
- ☐ Advanced Bookkeeping for Multiple Businesses *
- ☐ Advanced Payroll
- ☐ Budgeting & Managerial Accounting *
- ☐ Debt and Cash Flow Management *
- ☐ T2 Tax Preparation for Micro Enterprises

☐ **MFA-Business Services Specialist™**
Learn Professional Corporate Tax Preparation and Business Planning

- ☐ Advising Family Businesses
- ☐ Tax Planning for Corporate Owner-Managers
- ☐ T2 Tax Preparation for Professional Practices
- ☐ Fundamentals of Business Succession Planning
- ☐ Business Valuation for Advisors
- ☐ Accounting for Business Transition

*New Edition

NEW STUDENTS: TUITION & STUDY PLAN - Pay in Full and Enrol by September 15 to Save the Most

New Students Study Options	*Regular Tuition Fees ($795/course)*	*Until September 15 Pay in Full - Save the Most*	*Your Savings:*	*EZ-Pay Plan: Monthly Payments* *Instalment Fee $25 per course. Add taxes to 1st payment.*
☐ **EARN A DESIGNATION** 6 courses, 180 CE Hours	**$4,770**	**$3,990**	**$780**	**1st payment $295 and 12 x $320.42**
☐ **EARN A DIPLOMA** 3 courses, 90 CE Hours	**$2,385**	**$2,145**	**$240**	**1st payment $295 and 7 x $264.30**
☐ **Certificate Course**, 30 CE Hours	**$795**	**$795**		**1st payment $295 and 2 x $262.50**

RETURNING CLIENTS: TUITION & STUDY PLAN - Pay in Full and Enrol by September 15 to Save the Most

Alumni Study Options	*Regular Tuition Fees ($795/course)*	*Until September 15 Pay in Full - Save the Most*	*Your Savings:*	*EZ-Pay Plan: Monthly Payments* *Instalment Fee $25 per course. Add taxes to 1st payment.*
DESIGNATION PROGRAM				
☐ 6 courses, 180 CE Hours	**$4,770**	**$3,870**	**$900**	**1st payment $295 and 15 x $248.33**
CONTINUATION PLAN				
☐ 5 More Courses, 150 CE Hours	**$3,975**	**$3,475**	**$500**	**1st payment $295 and 12 x $275.42**
☐ 4 More Courses, 120 CE Hours	**$3,180**	**$2,780**	**$400**	**1st payment $295 and 10 x $258.50**
☐ 3 More Courses, 90 CE Hours	**$2,385**	**$2,085**	**$300**	**1st payment $295 and 7 x $266.43**
☐ 2 More Courses, 60 CE Hours	**$1,590**	**$1,490**	**$100**	**1st payment $295 and 5 x $249.00**
☐ Next Course, 30 CE Hours	**$795**	**$745**	**$50**	**1st payment $295 and 2 x $237.50**

CHOOSE PAYMENT OPTIONS:

☐ **FULL PAYMENT (Save the Most!)** $ ____________

☐ **EZ-PAY PLAN (1st payment only now, see above)** $ ____________

☐ **HARD COPY** *Textbook* **# Courses ______ x $95** $ ____________

SUBTOTAL $ ____________

GST/HST **(885004713RT001)** $ ____________

TOTAL DUE NOW: $ ____________

*EZ-Pay Instalment Fee Added: $25 per course. Payments: 15th of every month.
Maximum Study Time: One Course - 4 months; Diploma 1 year; Designations - 2 years.

☐ I agree to receive course updates, scheduling, communications and transcripts

CHOOSE A PAYMENT METHOD

☐ Credit Card ☐ Visa ☐ MasterCard ☐ Amex

Card Number ____________

Expiry Date ____ / ____ Amount $ ____________

Name on Card ____________

Signature ____________

How did you hear about us?

☐ Mail ☐ Email ☐ Internet ☐ Social Media ☐ Referred by ____________