First Course Bonus
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ENHANCE YOUR CREDENTIALS AS A BUSINESS SERVICES SPECIALIST

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Level 1: Diploma Program

Having an MFA is not simply about the money, the product, or the plan—it's about creating and managing inter-advisory relationships with ideal clients.

Prepare financial statements and T1 and T2 tax returns for the families of small and medium-sized business enterprises on start-up, throughout the lifecycle of the business—from start-up, to mid-term growth, and on transition to the next business owner.

COMPLETE 3 COURSES: BECOME A CERTIFIED BUSINESS TAX PRACTITIONER™

T2 CORPORATE TAX PREPARATION – MICRO BUSINESSES

Understand the business issues and tax options that underlie the taxation of corporate income for your small business clients.

Certified Skills:

- Identify accrual and cash basis accounting
- Understand retained earnings and the return of capital; active business income and specified investment business income
- Properly report income for tax purposes and reconciliation of transactions
- Know tax principles for reserves utilized to defer taxes
- Thorough knowledge of tax consequences on various methods of remuneration

T2 CORPORATE TAX PREPARATION – SMALL BUSINESSES

Prepare accurate T2 tax returns, minimizing tax and identifying planning opportunities for your corporate clients.

Certified Skills:

- Understand basic tax planning concepts for the corporation and its shareholders
- Competently prepare the T2 jacket – complete the Identification section, GIFI, S1, S2, S3, S4, S6, S7, S8, S10
- Assist owner-managers with simple planning scenarios
- Understand the business issues and tax options facing corporations
- Minimize tax and identify planning opportunities on a timely basis

TAX PLANNING FOR CORPORATE OWNER MANAGERS

Explore the options for constructing compensation packages for business owners to maximize after-tax income.

Certified Skills:

- Thorough understanding of the income tax implications of dividends, salary, and deferred compensation programs
- Understand the income tax limitations on income splitting
- Know the tools commonly used to split income – salaries, dividends, the use of family trusts and holding companies
- Understand the various forms of deferred income plans: registered and non-registered pensions, RRSPs, deferred profit sharing, salary deferral arrangements

Any one of these certificate courses will enhance your skillset; combined together, they will propel your career opportunities!

Level 2: Designation Program

"If you are in the business of giving financial advice, this course will round out any gaps in your knowledge on the business owner special planning needs...High relevancy to my practice.
– Maria K., AB

"Maintaining my designations ensures I stay current and connected and better able to advise my clients to the ever changing world of taxation. It has helped me work with them to keep as much of their hard earned dollars in their pocket while remaining compliant."
– Phyllis M., MFA, MB

COMPLETE 6 COURSES: BECOME AN MFA–BUSINESS SERVICES SPECIALIST™

FUNDAMENTALS OF SUCCESSION PLANNING

Provide guidance on the importance of succession planning for business-owner clients from both the business leader and successor perspective.

Certified Skills:

- Thorough understanding of the importance of the planning process
- Differentiate and understand the relationship between succession planning for key positions and for the business as a whole
- Coach business leaders and successors on responsibility and financial issues they should consider in succession planning
- Assist clients in implementing succession plans and addressing issues
- Understand the options and process for pursuing succession to a third party

BUSINESS VALUATION FOR ADVISORS

Prepare your clients to face various types of business transactions through a solid understanding of the fundamentals of business valuation.

Certified Skills:

- Understand the notion of value and the relationship between business transactions and value
- Differentiate between company and market based approaches to estimating value
- Help clients prepare for undertaking business transactions
- Identify key aspects of negotiation and due diligence
- Understand key aspects of the closing and transition stage
- Understand the nature of value and investment transactions

ACCOUNTING FOR BUSINESS TRANSITIONS

Gain a working knowledge of the issues that advisors to an owner/manager must deal with regarding the sale or succession of a business.

Certified Skills:

- Record and adjust transactions denominated in a foreign currency
- Understand principles in preparing consolidated and combined financial statements
- Prepare and post journal entries to eliminate inter-company transactions
- Know what information is to be accumulated and assessed in evaluating the purchase or sale of a business
- Understand family and employee succession and sale of either assets or shares

For full curriculum details and chapter overviews, visit www.knowledgebureau.com

e-Learning Registration Form

Everything you need to successfully achieve your certifications is included. Visit www.knowledgebureau.com for more details.

HOW TO REGISTER:
Phone: 1-866-953-4769 (toll-free) Fax: 204-953-4762
Online: www.knowledgebureau.com
Email: registrar@knowledgebureau.com

Identification (Complete one form per student)

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

Select an Online Program – I Want to Earn My:

- ☐ **CERTIFICATE – ANY 1 COURSE** (30 CE/CPD CREDITS) DURATION: 4 MONTHS
- ☐ **DIPLOMA – ANY 3 COURSES** (90 CE/CPD CREDITS) DURATION: 1 YEAR
- ☐ **DESIGNATION – ANY 6 COURSES** (180 CE/CPD CREDITS) DURATION: 2 YEARS

GET STARTED:

1. Select your program
2. Select your payment plan
3. Make payment
4. Start today or at your convenience

FURTHER STUDY OPTIONS

☐ **MFA–BUSINESS SERVICES SPECIALIST™**	☐ **MFA–RETIREMENT INCOME SPECIALIST™**	☐ **MFA–SUCCESSION AND ESTATE PLANNING SPECIALIST™**
Level 1: Diploma	**Level 1: Diploma**	**Level 1: Diploma**
☐ T2 Corporate Tax Preparation – **Micro Businesses**	☐ Elements of Real Wealth Management	☐ Fundamentals of Succession Planning
☐ T2 Corporate Tax Preparation – **Small Businesses**	☐ Tax Strategies for Financial Advisors	☐ Final Returns on Death of a Taxpayer
☐ Tax Planning for Corporate Owner-Managers	☐ Advanced Tax-Efficient Retirement Income Planning	☐ Investment Strategies in Charitable Giving
Level 2: Designation	**Level 2: Designation**	**Level 2: Designation**
☐ Fundamentals of Succession Planning	☐ Debt and Cash Flow Management	☐ Advising Family Businesses
☐ Business Valuation for Advisors	☐ Portfolio Risk Management in Retirement	☐ Insurance Strategies for the Small Business Owner
☐ Accounting for Business Transitions	☐ Cross Border Taxation	☐ Business Valuation for Advisors

ADD-ON STUDY OPTIONS:

☐ Hard copy textbook (pay $75 printing, shipping, handling per course)

☐ Branch Office study group (2 or more people, save 10%)

Plan A: Tuition – Full Payment

Pay in full and save up to 30% when you enrol in the Designation Program. Taxes extra.	Regular Tuition $795/course	Total Fees
☐ Designation Program (6 courses – 1st course 50% off)	1 x $297.50 5 x $595	$3272.50
☐ Diploma Program (3 courses)	$665	$1995
☐ Certificate Program (1 course) (Alumni – Enrol for $665)	$795	$795

Plan B: Tuition – EZ-Pay Plan

Total tuition includes finance fee Taxes extra. *Fees have been rounded	Total Tuition	Monthly Payments * Add taxes to 1st payment *
☐ Designation Program (6 courses – 1st course 50% off) Finance Fee: $55/course	$3600	18 x $200
☐ Diploma Program (3 courses) Finance Fee: $35/course	$2100	9 x $233
☐ Certificate Program (1 course) Finance Fee: $15/course	$810	3 x $270

Payment Plan Worksheet

☐ **Full Payment** ☐ **EZ-Pay Instalment Plan**

Number of Courses: _______ A x fee from Plan A or B = B below

TOTAL TUITION FEES: $_____________B

Hard Copy Textbook Shipping (A x $75) $_____________C

SUBTOTAL (B + C) $_____________D

GST/HST (885004713RT001) $_____________E

TOTAL DUE (D + E) $_____________F

Choose a Payment Method

☐ Credit Card ☐ Visa ☐ MC ☐ Amex

Card Number ________________________________

Expiry Date ___ /___ Amount $______________

Name on Card ________________________________

Signature ________________________________

☐ Cheque/ Money Order

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