

# TRUST YOUR FINANCIAL FUTURE TO

A Distinguished  
Master Financial Advisor™



## YOUR BEST INTERESTS IN MIND

Financial Decision-Making is Complicated.  
We Can Help You Make Sound Decisions.

## Your MFA-Specialist™

An MFA-Business Tax or Retirement Services Specialist™ works on your behalf to manage long term risk to your family's net worth by helping you to:

- > Manage debt, monitor debt-to-entry ratios and build sustainable family wealth;
- > Interpret the results on your Net Worth Statements. Is the bottom line of your family's wealth growing every year?
- > Oversee and structure the tax, investment, retirement, succession, and business plans that secure your retirement and your legacy, including the community giving you may put into place;
- > Analyze all forms of capital including human, financial, and non-financial for improvement to your plan.

*With broad technical and practical knowledge, your highly qualify Distinguished Master Financial Advisor™ adds a new value proposition to your professional financial team - or assembles one for you for the best results.*

## Your RWM™ - Real Wealth Manager

The highly trained RWM is a professional with deep, broad knowledge who will help you cement the relevance of tax and financial planning. As your trusted lead advisor, the RWM will ensure wealth management plans are properly communicated, as required, with all the stakeholders, to ensure ongoing financial success. The RWM is trained to engage you to consider the financial decisions that must be made throughout lifecycle change. Knowing you and your wishes well, the RWM will help you visualize a pathway to financial peace of mind.



Below you'll find the name and contact information of your nearest Distinguished Master Financial Advisor™.



For more information about RWM™, MFA™ and DFA-Specialist™ qualifications, visit [www.knowledgebureau.com](http://www.knowledgebureau.com) or call 1-866-953-4769



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# MAXIMIZE YOUR FINANCIAL WELL-BEING

Choose a Knowledgeable Professional with your Best Interests in Mind.

No matter how much money you have to work with, you can benefit from the expertise you get from a Distinguished Master Financial Advisor™.

# FIND THE BEST HELP FOR YOUR FINANCIAL HEALTH

## What Should You Look for in a Professional Advisor?

- Make sure you work with a Distinguished Master Financial Advisor™.
- The RWM™, MFA™ or DFA-Specialist™ designations signify your advisor:
- > follows the strategic process of Real Wealth Management™ so you get measurable, tax-efficient financial results;
  - > is skilled in working with multiple generations in your family;
  - > can assemble and manage a team of financial specialists, if required;
  - > adheres to a high standard of conduct for transparency and accountability;
  - > is knowledgeable and committed to ongoing professional development so you benefit from the most current changes in tax and financial compliance.



## What Can The RWM™, MFA™ or DFA-Specialist™ Do For You?

“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...” Dan A., MFA, CFP, EPC Ontario

Your Distinguished Master Financial Advisor™ will work with you in four areas of wealth management: to accumulate your pre-tax wealth, grow and preserve your after-tax wealth, and help you transition into retirement and beyond. The role is three-fold:

- > Educate and keep you informed so that you can feel comfortable asking the most basic questions, be confident in the answers and the decisions you make together;
- > Advocate on your behalf so that you can trust that your advisory team is looking out for the very best solutions for you and your family today and in times of transition, incapacity or through challenges like stock market volatility or a tax audit;
- > Steward your Sustainable Wealth – today and tomorrow – by helping you minimize taxes and fees while managing risk of wealth erosion from inflation and other economic events;

- > Understand your financial triggers – the life, financial and economic events that require decision-making -- and provide sound solutions;
- > Strategize on a long term plan - to get the most from your money by reducing your personal and corporate taxes, thereby finding new dollars for investment purposes so you can better plan for important life events like retirement, business succession and estate planning.
- > Follow a clear process so that you can consolidate inter-generational wealth and meet regularly to execute on your plan;
- > Help you manage your risk and enjoy true wealth, which comes with peace of mind about your financial affairs.
- > Inform you on the implications of ongoing change in tax and economic affairs that affect you and your wealth.



## Your DFA-Specialist™

Count on your DFA-Tax or Bookkeeping Specialist™ to give you peace of mind in dealing with the Canada Revenue Agency. From meticulous books and remittances throughout the year to accurate personal and corporate tax returns, these professionals manage your CRA compliance risk and work with you to enable:

- > measurable results with reductions in personal and corporate taxation;
- > increased real dollars, before tax, available for investment purposes;
- > increased after-tax values of income and accumulated capital.