Advising Family Businesses

Only from

Knowledge Bureau®
Excellence in Financial Education

OF SPECIAL INTEREST TO:

- Accountants
- Bookkeepers
- Tax preparers looking to expand their businesses
- Those looking for staff training solutions

- Expand your career by learning the intricacies of family business planning
- Take a leadership role in advising family business clients on succession planning
- Achieve consistently accurate results for your clients

Study On Your Terms and Time in Our World-Class Virtual Campus

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1. Enrol online at www.knowledgebureau.com
2. Scan and email the completed registration form to our Registrar at registrar@knowledgebureau.com
3. Call our Registrar toll-free at 1-866-953-4769
4. Fax your registration form to 1-204-953-4762

Free educational consultation available

Knowledge Bureau®
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Self-Study Application Form

For full curriculum details, see www.knowledgebureau.com

ADVISING FAMILY BUSINESSES

It's widely accepted that many small businesses in Canada are led by individuals that are in or near retirement age. The majority of these companies require assistance with succession related issues, often due to a lack of planning within the business. Qualified advisors have a significant opportunity to assist in this regard, building clients for the long term.

CONTENT DESCRIPTION & KEY CONCEPTS

It is widely accepted that the majority of family businesses do not survive past the first or second generation. This represents an unfortunate loss, not only for the family that relies on this income for financial stability, but also for Canada's economy. Family businesses have unique opportunities and challenges, and require advisory assistance with this in mind. A distinguished advisor must take a leadership role in quarterbacking the process of helping family businesses to plan for both today and tomorrow, thereby protecting what is often their most valuable asset. Help your clients beat the succession odds by better understanding the planning process today.

CERTIFIED SKILLSETS YOU WILL LEARN

- How to work in alignment with your family business clients, increasing the likelihood that solutions will be implemented
- How to work with clients to identify and separate family, business, and ownership issues
- How to help your client set clear, shared goals for the family, the business, and the shareholders so that all aspects of the family and the company can function smoothly
- How to help clients to identify an ideal planning timeline
- How to implement Real Wealth Management into planning process for family business clients
- How to conduct the succession mapping process
- How to recognize roadblocks to implementation before they occur
- How to develop and quarterback an advisor team
- How to maximize your value to the client, while identifying potential advisory opportunitiesl sales opportunities
- Understanding the advisory needs of family businesses, in terms of their unique opportunities and challenges

COURSE COMPONENTS

MULTI MEDIA INTRODUCTION – Your virtual instructor overviews key concepts in each chapter.

KNOWLEDGE JOURNAL TEXTBOOK – A full course manual containing detailed study materials, chapter by chapter.

EVERGREEN EXPLANATORY NOTES – A comprehensive reference library.

PRACTICE MANAGEMENT THESIS – Your formal case study online: a great review before your final exam.

TESTING – Chapters end with multiple-choice quizzes and true-to-life cases. A comprehensive final exam is written at the end of your studies.

ACCREDITATION – Earn 30 CE/CPD credits per course.

TABLE OF CONTENTS

Study Time: 30 hours

STEP 1: STUDENT IDENTIFICATION

Name ____________________ Returning Student ID #

Company ____________________

Address ____________________

City ____________________ Province

Postal Code ____________________ Email

Phone with Area Code ____________________ Fax

Referred By ____________________ Current Designations/Licensing

STEP 2: TUITION FEES

☐ **Single Course Tuition Fee**	**$795**
☐ **Electronic Textbooks**	**No Extra Charge**
☐ **Hard Copy Textbooks and Delivery**	**$ 85**

OR

☐ **Choose Certified Skills Diploma or Designation Program and save up to 31%**

See www.knowledgebureau.com for tuition funding options and details on qualifying for tax credits.

STEP 3: PAYMENT PLANS

☐ **Full Payment Plan** (Branch Office study groups save 10%):
Number of Courses: _______ **A** x fee from Step 2 = **B** below

TOTAL TUITION FEES:	$_____________B
Hard Copy and Delivery (see step 2)	$_____________C
SUBTOTAL (B + C)	$_____________D
GST/HST (885004713RT001)	$_____________E
TOTAL DUE (D + E)	$_____________F

☐ **EZ-Pay Instalment Plan:** Call 1-866-953-4769 for details.

STEP 4: PAYMENT METHODS

☐ **CREDIT CARD:** ☐ Visa ☐ MC ☐ Amex Expiry Date ___ / ___

Card Number ____________________

Name on Card ____________________

Signature ____________________

STEP 5: REGISTRATION OPTIONS

Phone: 1-866-953-4769 **Fax:** 1-204-953-4762
Online: www.knowledgebureau.com
Email: registrar@knowledgebureau.com

☐ Unless box is checked, I provide consent for you to store my contact information and inform me of my progress and future educational opportunities.