Investment Strategies in Charitable Giving

Only from

Knowledge Bureau®
Excellence in Financial Education

OF SPECIAL INTEREST TO:

- Financial advisory firms
- Independent financial advisors
- Financial planners
- Tax and accounting professionals

- Expand your career with a solid understanding of strategic charitable planning
- Assist clients with philanthropic goals as part of an overall wealth management plan
- Advise clients on how to give to charities tax-efficiently

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

- Individualized study plans, instructor support
- 24/7 access to online lessons, quizzes
- Valuable e-journals, software, calculators
- Testing, accreditation and certification
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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®
Excellence in Financial Education

Self-Study Application Form

For full curriculum details, see www.knowledgebureau.com

INVESTMENT STRATEGIES IN CHARITABLE GIVING

Canadians are becoming more philanthropic; giving more every year to causes that are important to them, but there is today a major change in the world of philanthropy—people want to be in control of how they give. They are holding the organizations accountable for the money and want to see how it is managed. They're becoming far more demanding in wanting to maximize the impact of their donations. This course is to assist financial advisors who want to ensure their clients' gifts complement their overall wealth management strategy in a tax-effective manner.

CONTENT DESCRIPTION & KEY CONCEPTS

Learn how to integrate charitable giving strategies into your annual financial reviews • Learn how to use charitable giving as a way to build your business • Help clients to give in the most a tax efficient way • Help clients to decide whether they want to give directly, start their own charity, give through an endowment, or use donor-advised funds • Determine which financial tools and techniques are appropriate for certain client situations • Understand your role in terms of your clients' charitable giving

CERTIFIED SKILLSETS YOU WILL LEARN

Using case studies and exams, students will learn to convey the process behind some of the most powerful gift planning concepts used by financial advisors to maximize charitable gifts while minimizing taxes for clients:

- Learn the different benefits for donors of different gift types and determine which are most appropriate for your clients.
- Understand the main components of charity law and taxes that can affect gift plans.
- Complete the case studies to test your new skills in defining gift plans for clients using charitable bequests, gifts of securities, gifts of life insurance, donor advised funds, real estate and other gifts.
- Familiarize yourself with the potential pitfalls of charitable giving including how to look out for those tax shelter schemes not acceptable to CRA.
- Discover how to find resources to assist you in the development of a client's gift plan.

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.