T3 Basic Tax Preparation

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Excellence in Financial Education

OF SPECIAL INTEREST TO:

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

- Expand your understanding of types of trusts
- Optimize taxes payable on income earned by the trust
- Prepare T3 trust returns and prepare T3 slips for beneficiaries

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
- Easy pay plan customized to fit your budget
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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

T3 BASIC TAX PREPARATION

This course introduces the types of trust that may be created in Canada and how each of them is taxed.

CONTENT DESCRIPTION & KEY CONCEPTS

Students will learn how to prepare T3 returns as part of the case study exercises in the course. In the process, the students will learn how to optimize taxes payable on income earned by at trust by choosing to pay the taxes through the trust or allocating income to beneficiaries and having them pay the taxes on those allocations. The Trust Tax Estimator tool, provided with this course, will help you to minimize taxes on trust income. This tool will allow you to determine whether the trust or beneficiary will pay more taxes on allocated income so that tax can be paid by the trust before allocation if the beneficiary would have to pay more tax than the trust.

CERTIFIED SKILLSETS YOU WILL LEARN

Upon completion of this course, students will be familiar with the taxation of various trusts and be able to prepare T3 trust returns and prepare T3 slips for beneficiaries.

Study Time: 30 hours

An understanding of T1 Tax Preparation is recommended.

A mark of 60% is required to pass the course. All students who pass the course will receive a certificate. Students who receive a mark of 90% or better will receive a gold Honours bar on their certificate.

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

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** **$ 95**

OR

☐ **Choose Certified Skills Diploma or Designation Program and save**

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.