Tax Efficient Retirement Income Planning

Enrol Risk Free
Take a Free Trial:
www.knowledgebureau.com

Only from
Knowledge Bureau®
Excellence in Financial Education

OF SPECIAL INTEREST TO:

- Financial advisory firms
- Tax professionals
- Tax preparers looking to expand their businesses
- Accountants and bookkeepers

- Expand your business by specializing in tax-efficient retirement income planning
- Assist baby-boomer clients in defending their retirement savings against tax erosion
- Accurately prepare retirement plans that achieve the necessary results

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
- Risk-free enrolment

How to Enrol in Your Self-Study Course Today

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

TAX-EFFICIENT RETIREMENT INCOME PLANNING

Planning tax-efficient retirement income is a skillset in great demand by the baby boomer demographic—the most affluent generation in our history—who seek credible, trusted and expert solutions to their complex retirement planning requirements, and view tax erosion as the biggest threat to their wealth. In fact, with recent tax changes that introduce a high-income tax bracket, this is more true than ever.

CONTENT DESCRIPTION & KEY CONCEPTS

This course allows advisors to develop a consistent process for multi-generational planning that looks not only at tax efficiency of income, but also at the tax efficiency of the capital left for spouses and heirs, using cutting-edge tools to predict how sustainable savings will be, and what can be done through income averaging, income splitting and tax deferral.

CERTIFIED SKILLSETS YOU WILL LEARN

The student will acquire the following skills:

- Use a financial assessment tool around which to structure the client's pre- and post-tax retirement income needs and monitor ongoing results on a projected Net Worth Statement.
- Do a proper assessment of client vision and goals for retirement, and engage clients in a consistent process for addressing the three trigger issues that cause financial decision-making: life events, financial events and economic events.
- Establish a strategic "real wealth management plan" based on client needs for tax-efficient income as well as after-tax capital preservation, growth and transition.
- Establish action plans, including savings and withdrawal strategies, for a long-term, tax-efficient retirement income planning approach around the three specific phases of retirement planning—pre-retirement, in-retirement and post-retirement.
- Provide post-retirement guidance to survivors and plan for the most advantageous asset transfer opportunities.

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**	**$795**
☐ **Electronic Textbooks**	**No Extra Charge**
☐ **Hard Copy Textbooks and Delivery**	**$ 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.