Knowledge Bureau Current Course Curriculum

MFA, RETIREMENT INCOME SERVICES SPECIALIST™

- Tax–Efficient Retirement Income Planning
- Financial Literacy: Assessing Risk and Return
- Portfolio Construction for Real Wealth Management™
- Advising Family Businesses
- Tax Planning for the Corporate Owner-Manager
- Use of Trusts in Tax and Estate Planning

MFA, INVESTMENT INCOME SERVICES SPECIALIST™

- Elements of Real Wealth Management™
- Portfolio Construction for Real Wealth Management™
- Tax–Efficient Investment Income Planning
- Financial Literacy: Assessing Risk and Return
- Portfolio Risk Manager
- Cross Border Taxation

DFA, TAX SERVICES SPECIALIST™

- Introduction to Personal Tax Preparation
- Advanced Tax Preparation and Research
- Tax Preparation for Proprietorships
- Basic Bookkeeping for Business
- Introduction to Corporate Tax Preparation
- Death of a Taxpayer

DFA, BUSINESS SERVICES SPECIALIST™

- Managerial Accounting
- Advanced Bookkeeping: Various Business Profiles
- Advanced Payroll
- Tax Planning for the Corporate Owner-Manager
- Accounting for Business Transitions
- Basic Bookkeeping for Business