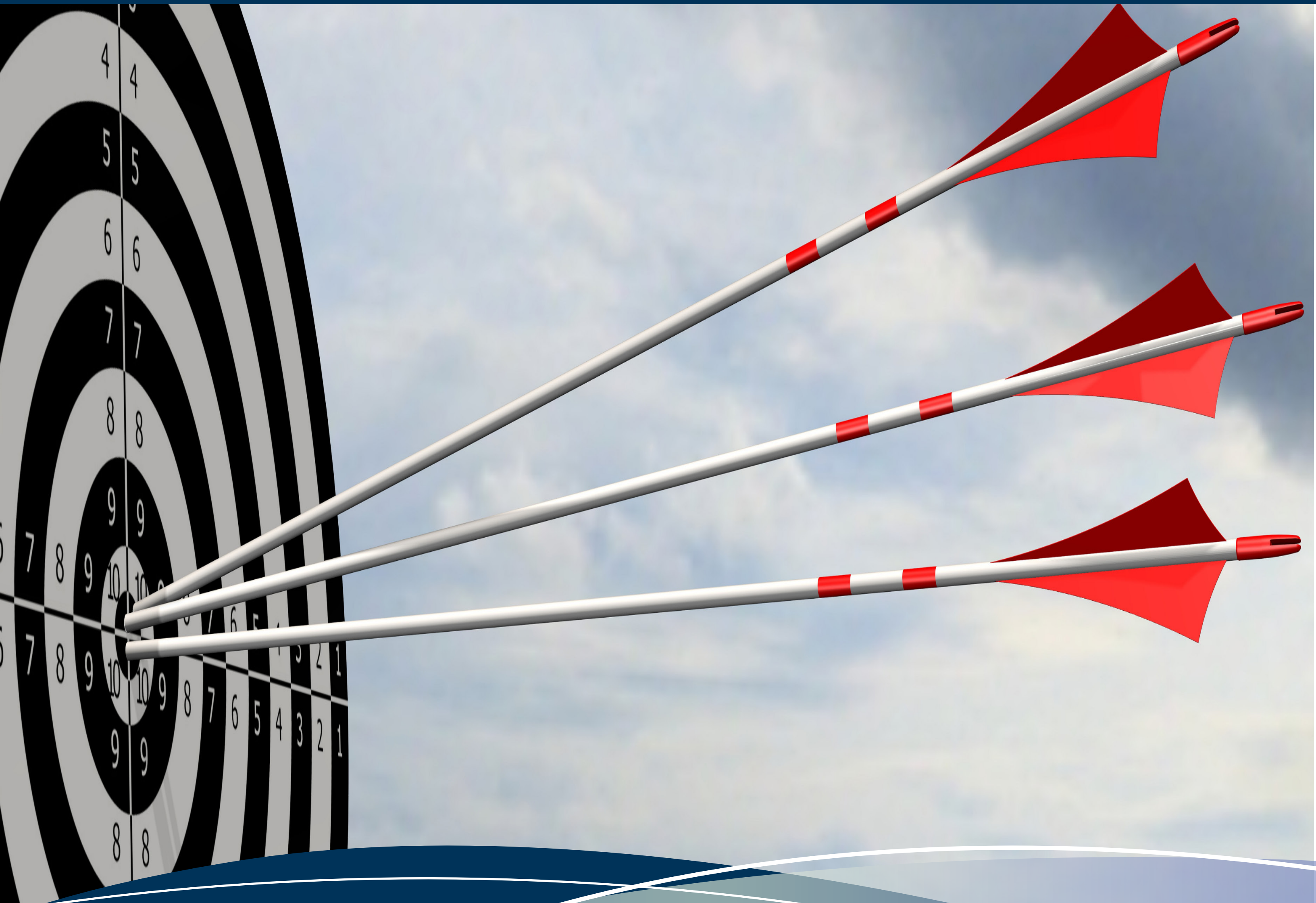
THE 2020 ADVANCED PROFESSIONAL TAX FILING COURSE



Program Guide

Knowledge Bureau®
World-Class Financial Education

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THE 2020 ADVANCED PROFESSIONAL TAX FILING COURSE

This new online tax training program is the right one for unusual times in the tax and financial services. Not only does it address the myriad of changes on the 2019 tax return, it also provides an important professional program during an unprecedented health crisis. It is an important training solution for four specific needs:

1. Add a new revenue stream to your existing business.
2. Business owners who may have laid off their staff during the pandemic will want them to keep skills sharp until the health threat subsides.
3. Those who will need to hire new qualified professionals will want them to earn their qualifications in the interim.
4. Unemployed people may wish to do this program to provide subcontracting services to tax, bookkeeping and financial planning professionals.

This course comes to the rescue will all new online quizzes and case studies featuring that are challenging and fun and will delight long time students of Knowledge Bureau who are starving for a new course challenge.

WHY IS THIS COURSE SO TIMELY. The 2019 tax return has a completely new format – it is 8-pages long and features an integration of all the non-refundable tax credits and federal tax credits (the former Schedule 1) into the Jacket. All the line numbers have changed from three to five digits, and there are numerous theoretical changes as well. This program is a critical professional training tool for new and returning staff in light of the extension of the tax filing deadline to June 1 and the deferral of tax payments to August 31.

OVERVIEW. ***The 2020 Professional Advanced Tax Filing Course*** for 2019 tax returns is a certificate course that qualifies you to prepare advanced level tax returns for individuals, investors and unincorporated small business owners. Perfect for experienced tax practitioners, it takes a deep dive into the changes on the federal and provincial tax returns, but in addition, provides an advanced theoretic journey into complex investment and small business topics. A detailed table of contents follows.

PREREQUISITES. It is assumed the student has at least one-year experience working with a variety of personal income tax returns or is a new tax preparer working under the guidance and mentorship of an experienced manager of a tax or accounting office. Also perfect for bookkeepers looking for a fast track into the tax filing business as a second revenue source.

AN ACCREDITED PROGRAM. Completion of this professional online course provides the successful graduate with 30 CE/CPD hours towards meeting CE requirements for Knowledge Bureau designations. This course is one of six in ***the DFA-Tax Services Specialist™ Designation program***. Be sure to take all six courses to earn your prestigious, nationally-recognized credentials.

Additional Educational Options. You might also be interested in these certification courses for your advanced studies:

- ***Corporate Income Tax Fundamentals***
- ***Fundamentals of Filing Trust Returns***
- ***Business Valuation***

YOUR COURSE COMPONENTS. There are 10 lessons with the introduction, each followed with a quiz and an exam.

This online course features your lesson plans, a comprehensive Knowledge Journal and a Research and Practical applications experience featuring audio presentations and podcasts, some of which were recorded in front of a live audience at the CE Summits in Toronto, quizzes, case studies, a Practice Management Thesis which is a review before your examination and access to professional tax software.

RESEARCH ASSIGNMENTS. All students also have access to ***EverGreen Explanatory Notes***. It would be helpful to read the following topics:

1. 2019/2020 TAX FACTS
2. BUDGET 2019 – PERSONAL TAX CHANGES
3. ALIMONY
4. CAPITAL ASSET CLASSIFICATIONS
5. CAPITAL GAINS ELECTION
6. CARRYING CHARGES
7. COMPLIANCE FACT SHEETS
8. EMPLOYMENT INCOME AND DEDUCTIONS
9. EMPLOYMENT INSURANCE
10. FOREIGN ASSET REPORTING
11. PRINCIPAL RESIDENCE
12. RDSP
13. RRSP

TUITION FEES. Train staff, refresh and retrain your existing staff or refer this course to subcontractors who may wish to help you out when things get busier. The tax-deductible tuition fees are **$795.00** per course (taxes extra) and payment is accepted by e-transfer or credit card. **Enrol before the end of the month and save $50.**

ONLINE GROUP STUDIES. When you encourage everyone in your office to go on to earn their certificate, diploma or designation, there is a special bonus for you: **group training discounts of $100 per course are available. A group is two or more people studying together.**

RISK FREE TRIALS ARE AVAILABLE. We want you to be sure you make the best educational decision for your time and money.

HOW TO GET STARTED. Knowledge Bureau's Cutting-Edge Virtual Campus features 6 Easy Steps to Success in completing your lessons after you enroll online or call our national head office for friendly personal support: 1-866-953-4769

ENROL

Step 1: Log on to your Virtual Campus

- Step 2: Review the Lesson Plan for this lesson
- Step 3: Open or print the Powerpoint Presentation for each chapter. You'll find this under "Research and Practical Assignments."
- Step 4: Play the audio presentation and follow the speaker as they enlighten and refresh you with key points found through the slides. At any time, you can pause the presentation to review details of the income, deductions or credits in the pages that follow, or open up your ***Knowledge Journal*** or ***EverGreen Explanatory Notes*** for more information.
- Step 5: Active Reading in your Knowledge Journal. A great way to stay focused as you read through your Knowledge Journal is to be sure that you can answer each of the key questions posed in each Lesson Plan. These questions also make a great review before any quizzes or your exam. If you are unsure of the answers, you will find them in the Knowledge Journal or powerpoint presentations.
- Step 6: Take the multiple-choice quiz to test your understanding of the material in each chapter. As a rule, the questions will test your new knowledge and skills by asking you to apply the rules that you learned to a client situation.

YOUR KEYNOTE PRESENTERS AND COURSE AUTHORS

EVELYN JACKS
MFA, DFA-Tax Services Specialist
PRESIDENT, KNOWEDGE BUREAU

Evelyn is the Founder and President of Knowledge Bureau, Canada's leading national educational institute for professional development in the tax and financial services. She has developed seven designation programs for professionals in the tax, bookkeeping and financial services: the prestigious RWM™ (Real Wealth Manager), MFA™ (Master Financial Advisor), the MFA-P™ (Philanthropy), the DFA-Tax and Bookkeeping Services Specialist™ Designations and the new MFA™- Independent Practice Management Specialist Designation.

Evelyn is Canada's most respected educator in tax and financial literacy and one of Canada's most prolific financial authors, having written 55 books, many of them best-sellers. Her most recent are, *Make Sure It's Deductible, Essential Tax Facts,* and *Family Tax Essentials.* Evelyn appears regularly in MoneySense Magazine, on BNN, CBC and regional media. Follow her on Linked In and twitter @evelynjacks.

WALTER HARDER, RWM™, DFA-TAX SERVICES SPECIALIST™

Walter Harder has achieved his Master Instructor Certification with Knowledge Bureau by participating in a number of required milestones, including attainment of his *DFA-Tax Services Specialist™* designation, the RWM™ designation. He is the co-author and developer of the *RWM Calculators*™ and excels at preparing analysis, tax course development and writing for Knowledge Bureau Report.

Walter has been instrumental in online course creation, updating and testing, student and instructor support and mentorship, lecturing at the *Distinguished Advisor Conference* and *CE Summits* and in developing curriculum for corporate clients of Knowledge Bureau. He has also worked as a lead researcher and personal tax content contributor to *EverGreen Explanatory Notes*.

Recently, Walter has taken on the challenge to assist Knowledge Bureau in a new educational series: the *Knowledge Gap Courses™*, launching in February 2020.

Walter Harder is President of Walter Harder and Associates, specializing in tax research, and web software tool development. In his spare time, Walter prepares T1 returns for clients and has a wonderful green thumb.

HENRY SHEW, CPA, CA, TEP, CPA (Washington), MAcc
Sr. Tax Manager Cadesky and Associates LLP

Henry Shew is a senior tax manager at Cadesky and Associates LLP, based out of Toronto. Henry specializes in domestic and international tax, with a focus on planning for high-net worth individuals, immigration/emigration, and estate planning. Henry has written numerous professional papers for the Canadian Tax Foundation.

Henry has been involved with STEP Canada (Society of Trusts and Practitioners) and is currently serving as a member of the Student Liaison Committee. Henry is a tutorial leader for the CPA In-depth Tax Course and Henry is part of the Toronto Young Practitioners Steering Committee for the Canadian Tax Foundation.

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LESSON 10: TAX TRENDS AND CHANGES 2019-2020

To complete your course studies with confidence and master your graduation with excellence:

1. **PRACTICE MANAGEMENT THESIS – THE REVIEW BEFORE THE EXAM**
2. **YOUR EXAMINATION**
3. **YOUR EVALUATION**

THEN, SIGN UP FOR YOUR NEXT COURSE OPTIONS,
OR SAVE MONEY BY MAKING A COMMITMENT FOR A FULL DESIGNATION PROGRAM NOW.

EXPLORE: take a look now at the new all courses brochure and graduate pricing options:

(THIS NEEDS TO BE HOTLINKED)

ABOUT US

Founded by tax expert, award-winning financial educator and best-selling author, Evelyn Jacks in 2003, **Knowledge Bureau™** is a widely respected financial education institute and publisher based in Canada. Our world-class education solutions are innovative, informative, and in-depth, with a multi-disciplinary approach to professional development in the tax, accounting, bookkeeping and financial services.

Knowledge Bureau™ has welcomed tens of thousands of students to its online and in-class programs. It also provides customized education solutions for national and international organizations. Knowledge Bureau is recognized by the Employment and Social Development Canada. Tuition fees are tax deductible if over $100.

Our mission is to raise standards in the work financial intermediaries do by focusing on the evolving knowledge and skills required to *manage their client's income and wealth with tax efficiency*. We do that by providing competency-based training leading to a variety of credentials in the area of *personal, corporate, trust taxation, and investment, business, retirement, strategic giving and estate planning*.

Our graduates in 7 designation programs adhere to professional Standards of Conduct and are re-licensed annually based on meeting requirements for continuing education. Choose Knowledge Bureau to attain ongoing CE/CPD Credits, train staff or advance your career in the tax, bookkeeping or financial services. For more information see www.knowledgebureau.com or call 1-866-953-4769.

Since 2003, Knowledge Bureau has delivered a world-class financial education to a growing number of professionals in the tax and financial services industry:

Over 760,000 Online course module registrations leading to CE/CPD credit

Over 16,700 Knowledge Bureau Report (KBR) subscribers

Over 20,900 Technical training certificates issued

Over 10,100 Active certificate course students in diploma and designation programs

Over 1,700 DFA™ and MFA™ and RWM Designation program students

Over 12,000 CE Summits & Distinguished Advisor Conference attendees