



Knowledge Bureau®
Excellence in Financial Education

KNOWLEDGE BUREAU EDUCATIONAL CONSULTATION: ORGANIZATIONS

Corporate Profile (All information will be kept confidential)

Date:

Corporate Name		
Your Name		
Platform: MFDA IIROC INS Tax		Other
Address:		
City:	Province:	Postal Code:
Email:		
Phone(primary):		Fax:
Cell:		Years in Business:
Involved In: Financial Services Taxation and Accounting (circle one)		

Needs:

What client segments do you wish to serve?	
What level of education do clients need?	
What are the knowledge gaps in your organization?	

**Current Advisor Profile:**

New Advisors	
Experience	
Education	
Accreditations/Licenses	
Experience advisors	
Years in business	
Education	
Accreditations/Licenses	

Current Firm Profile

Client segments supported	
Target advisors who need help	
Supports in-house	
What's Missing	
CE requirements/annual	
Partners	

Education Plan: Needs and Recommendations

Needs	Educational Goals	Recommendations
Client Facing		
-Knowledge Gaps		
Advancement in Career		
-Diploma, Designation		
-Staff Training		

Please scan and email to registrar@knowledgebureau.com or
Fax to: 1-204-953-4762

Your educational consultant will contact you directly to discuss the educational goals for your organization.