



World-Class Financial Education

# YOUR 2026-2027 VIP BENEFITS PACKAGE

**Congratulations!**  
**You've Unlocked New Benefits as a  
VIP Designate**

# YOUR EDUCATIONAL EXPERIENCE

A structured path to becoming a highly skilled, certified specialist who can deliver exceptional value in the marketplace.

## ONLINE COURSES:

Study on your own in your own time with personal instructor support. Start any time!

## LIVE-VIRTUAL EVENTS:

Study peer-to-peer in full or half-day instructor-led sessions. Complement your online studies!

### Online & Live-Virtual Event Course Components:

- Comprehensive Online Knowledge Journals and Study Guides
- Recorded Presentations from Expert Instructors
- Online Tax Research Library
- Comprehensive Online Knowledge
- \*Fully Flexible - Risk Free Guarantee, course switches at no charge
- Selected courses also include Professional Tax Software: TaxCycle from Xero, DTMax from Thomson Reuters, Profile from Intuit. Professional Bookkeeping Software: SAGE 50 Accounting from Sage, Quickbooks Online from Intuit

## ACUITY CONFERENCE FOR DISTINGUISHED ADVISORS (DAC): NOVEMBER 22 TO 24 VICTORIA, BC.

An annual strategic networking, educational conference and awards ceremony. Open to all. Don't miss it - especially if you are a 2026 graduate or a practice Business Builder.

## RISK-FREE MONEY BACK GUARANTEE

Participate in a risk-free trial of the first chapter of a certificate course for seven days. There are no refunds after seven days from initial registration, or if you start chapter 2.

See detailed terms & conditions for additional academic policies and refund policies.



## LEARN MORE:

learn.knowledgebureau.com  
1.866.953.4769

"I get a wealth of information in the courses and during a Summit."

- Melissa Wenderski  
DMA-Tax Services Specialist™

# DESIGNATES TUITION GUIDE

EARLY BIRD OFFER: JUNE 15

## Keep Growing! Continue Your Professional Development.

Your Tuition Reduced by VIP Affinity Program - \$200 Plus Time-Limited Offer

**DMA-SPECIALIST PROGRAM: TAKE YOUR NEXT COURSES AND SAVE AN ADDITIONAL \$200**

| DESIGNATION:                                      | REGULAR FEES: | UNTIL 15-JUN: | SAVINGS:      | PER COURSE: | TERM:     |
|---|---------------|---------------|---------------|-------------|-----------|
| <input type="checkbox"/> Full Program - 6 Courses | \$5,970       | \$3,770       | \$2,200 (37%) | \$628       | 18 months |
| <input type="checkbox"/> 5 Courses                | \$4,975       | \$3,195       | \$1,780 (36%) | \$639       | 15 months |
| <input type="checkbox"/> 4 Courses                | \$3,980       | \$2,580       | \$1,400 (35%) | \$645       | 12 months |
| <input type="checkbox"/> 3 Courses                | \$2,985       | \$1,965       | \$1,020 (34%) | \$655       | 9 months  |
| <input type="checkbox"/> 2 Courses                | \$1,990       | \$1,350       | \$ 640 (32%)  | \$675       | 6 months  |
| <input type="checkbox"/> 1 Course                 | \$ 995        | \$ 695        | \$ 300 (30%)  | \$695       | 3 months  |

**NEW OPTIONS FOR UPSKILLING: SAVE AN ADDITIONAL \$200 UNTIL JUNE 15**

### LEADERSHIP PROGRAMS

### CE MASTERY

Save additional \$100 to early-bird deadlines

**RWM™ Real Wealth Manager**  
**With VIP and Time-Limited Offer:** \$1,495  
 Regular Tuition: \$1,795

**CE Master Micro-Credentials - Earn 15 CE Credits With VIP and Time-Limited Offer:** \$495  
 Regular Tuition: \$695

**MFA-P™ Master Financial Advisor - Philanthropy**  
**With VIP and Time-Limited Offer:** \$1,495  
 Regular Tuition: \$1,795

**Acuity Conference For Distinguished Advisors**  
**With VIP and Time-Limited Offer:** \$1,595  
 Regular Tuition: \$2,500

### FOR TAX UPDATES - TAKE THE CE SAVVY SUMMITS

**CE Summit - Advisory Diploma** \$398  
 4-FullDayVirtualWorkshops - Each  
 Regular Tuition \$795 each (save 50%)

**CE Savvy Advanced Update Summits** \$495  
 (January, May, September, November - Each)  
 Regular Tuition \$795 each (save 37%)



# Advancing Leadership in Tax-Efficient Wealth Management

## THE SOCIETY OF DISTINGUISHED DESIGNATES



- Shared Commitment to Financial Education
- Leaders in Evolving Financial Services to Meet Community Needs
- Advisement Through Analysis, Deep Discussion & Mentorship



World-Class Financial Education

### Of Special Interest to Designated Professionals Who Provide Intergenerational Wealth Management Solutions

#### About the Society of Distinguished Designates

The Society of Distinguished Designates at Knowledge Bureau brings together learned specialists who share a commitment to advancing professional excellence, elevating advisory leadership, and supporting the evolution of tax accounting, legal and wealth management services.

The Society welcomes Real Wealth Managers™ (RWM™), Master Financial Advisors – Philanthropy (MFA-P™), Distinguished Master Advisors (DMA-Specialist™), and FDFS™ Designates.

The goal is to provide a collaborative environment to enhance your influential role as Educators, Advocates, and Stewards within a growing professional community.



#### Purpose & Vision:

The Society exists to strengthen professional practice through shared learning, meaningful dialogue, and leadership development. As a member of this distinguished network, you will engage in networking and leadership opportunities to enhance and shape the future of tax-efficient wealth management in the following ways:

- **Educator** - A demonstrated commitment to world-class financial education and lifelong professional development.
- **Advocate** - Leadership in evolving financial services to meet the changing needs of clients, communities, and industry.
- **Steward** - Advisement through analysis, mentorship, and thoughtful discussion that advances best practices.

#### Membership: How to Join the Society of Distinguished Designates

Complimentary and automatic for undergraduates enrolled in a designation program and Designates who renew their license to use their certification marks with an annual attestation to professional standards.

#### LET'S CONNECT

[learn.knowledgebureau.com/society](http://learn.knowledgebureau.com/society) | 1.866.953.4769

Ready to Get Involved? Apply on Reverse, Online or Request More Information

# MEMBERSHIP APPLICATION FORM



## 3 EASY STEPS TO MEMBERSHIP:



Use the QR code to get started online

- Become a Designate:** Register in a Knowledge Bureau Designation Program as an Undergraduate, and membership is included at no cost during your study term.
- Renew your license to use your designation marks annually by June 30:** Attest to the Standards of Conduct to maintain your professional status and membership.
- Connect, Collaborate and Contribute** with other members committed to advanced leadership in tax-efficient wealth management at quarterly events.

## READY TO GET STARTED? PROVIDE YOUR CONTACT INFORMATION:

Name (first/last): \_\_\_\_\_

Company/Firm Name: \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_ Province: \_\_\_\_\_

Postal Code: \_\_\_\_\_ Email: \_\_\_\_\_

Home Phone: (\_\_\_\_) \_\_\_\_\_ Cell Phone: (\_\_\_\_) \_\_\_\_\_ Work Phone: (\_\_\_\_) \_\_\_\_\_

## ABOUT YOUR DESIGNATIONS & CREDENTIALS:

Help us understand your professional pathway and areas of specialization so we can connect you with the right Society discussions, leadership opportunities, and advanced credentials.

- |  |  |
|--|--|
| <input type="checkbox"/> DMA-Specialist™ | <input type="checkbox"/> CFA                 |
| <input type="checkbox"/> DFA-Specialist™ | <input type="checkbox"/> CFP                 |
| <input type="checkbox"/> MFA™            | <input type="checkbox"/> CIM                 |
| <input type="checkbox"/> RWM™            | <input type="checkbox"/> CPA                 |
| <input type="checkbox"/> MFA-P™          | <input type="checkbox"/> Insurance License   |
|  | <input type="checkbox"/> Mutual Fund License |
|  | Other: _____                                 |

## YOUR PATHWAY TO MEMBERSHIP:

### 1. ENROL IN A DESIGNATION PROGRAM

|  |         |
|--|---------|
| <input type="checkbox"/> RWM™ Designation            | \$1,795 |
| <input type="checkbox"/> MFA-P™ Designation          | \$1,795 |
| <input type="checkbox"/> DMA- Specialist Designation | \$3,970 |

Tax deductible fees include membership to the Society of Distinguished Designates. This membership continues after graduation with annual attestation to Standards of Conduct. Multiple designates pay only one fee. These programs qualify for VIP Grad/Designate Affinity Program.

### 2. ANNUAL STANDARDS OF CONDUCT ATTESTATION

|   |       |
|---|-------|
| <input type="checkbox"/> Attest By June 30              | \$0   |
| <input type="checkbox"/> Attest After June 30: Late Fee | \$397 |

Note: Standards of conduct have been met by June 30, 2026. Use of Designation Renewal is for July 1, 2026 to June 30, 2027 and includes Society Membership and VIP Designate Affinity Status. Attest at: [learn.knowledgebureau.com/attest](https://www.knowledgebureau.com/attest)

### 3. CONNECT, COLLABORATE & CONTRIBUTE

Society Members are invited to attend Quarterly Meetings in May, August, November and February in Winnipeg, Toronto, Victoria, Mexico (or alternate locations) in addition to live-virtual Distinguished Delegate Experience Events.

## PAYMENT METHOD:

Total Fees Before Tax: \$ \_\_\_\_\_

Plus Taxes: \$ \_\_\_\_\_

Subtotal: \$ \_\_\_\_\_

Total Due: \$ \_\_\_\_\_

E-Transfer\*  Visa  MasterCard

Credit Card Number: \_\_\_\_\_

Expiry Date: \_\_\_\_\_

Name on Card: \_\_\_\_\_

Signature: \_\_\_\_\_

GST/HST (885004713RT001) \*Save \$25 with E-Transfer, All Taxes Extra

## REFER A COLLEAGUE:

Name: \_\_\_\_\_

Company: \_\_\_\_\_

Email: \_\_\_\_\_

Phone: \_\_\_\_\_

I agree to receive course updates, scheduling, certification and transcripts from Knowledge Bureau and communications from the Society of Distinguished Designates™.

To learn more about Specialized Credentials from Knowledge Bureau and their curricula, academic policies and procedures, and technology specs go to: <https://www.knowledgebureau.com/site/faq> or call 1.866.953.4769

## POST-GRADUATION, EXPLORE:

- VIP Affinity Awards Program
- Attestation & Designation Renewal
- Awards Program: FDFS™ & The Acuity Conference for Distinguished Advisors

# GRADUATION, AWARDS & RE-LICENSING

## VIP AFFINITY PROGRAM

Join the exclusive club of grads and receive your VIP Affinity Status! At Knowledge Bureau we celebrate our Graduates, who have achieved 3 milestones in their career enhancement pathway:

**VIP Grad Status:** graduate from a new Certificate Program each academic year. Save \$100 on most enrolments.

**VIP Designate Status:** Graduate from one or more Designation Programs or Renew Your Designation annually to save **\$200** off most tuition fees that can be used to train your whole team!

**FDFS™ Honorary Status:** receive honorary distinction by writing, teaching or mentoring and save **50%** off most regular tuition fees.



**New for 2026! A Special Gift For VIP Designates & Honorary FDFS™ Recipients**

## DESIGNATION RENEWAL

Relicensing the use of your designation marks is an annual process. The academic year for these purposes is July 1 to June 30. Multiple Designates can complete this through a single attestation process.

**Attest to the Standards of Conduct & Renew Your Designation by June 30, 2026**

### Two Important Benefits:

1. Avoid the \$395 annual renewal fee
2. Bonus! Claim your Thank You Gift and earn 15 CE Credits

Choose 1-collection in our CE Master Micro-Credentials Program.

### Program Details Online at:

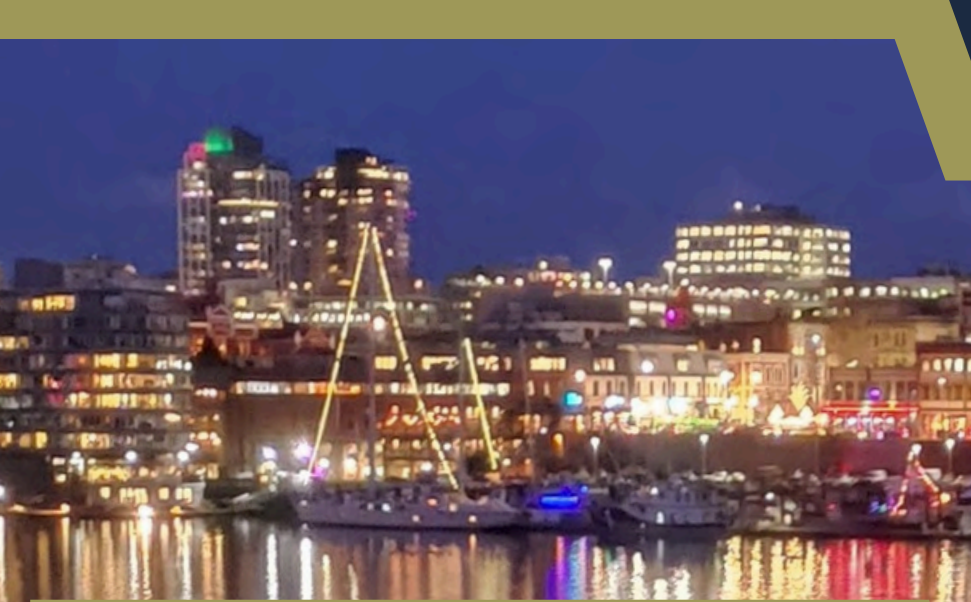
[learn.knowledgebureau.com/mastery](https://learn.knowledgebureau.com/mastery) or see detailed program brochure.



## LEARN MORE:

[learn.knowledgebureau.com/vip](https://learn.knowledgebureau.com/vip)  
1.866.953.4769





## Join Us for An Annual Awards Celebration at the Acuity Conference for Distinguished Advisors Featuring:

- Our Distinguished Designates and Graduates
- Fellows of Distinguished Financial Services (FDFS™)
- Special Achievements of Individuals and Firms

# ACUITY AWARDS PROGRAM

## ACUITY CONFERENCE (DAC)

Celebrate your achievements and a celebration featuring our Designates and FDFS™ at the 2026 Acuity Conference for Distinguished Advisors (DAC) and reach new professional heights among the stars of your industry.

**Join Us for the Acuity Conference Experience: November 22-24, Victoria BC**

**Theme: The North Star  
Strategic Direction & Value Reflection**

- Awe-inspiring education in a pristine setting
- Participate and deliberate in thought leadership
- Connect & collaborate with like-minded professionals

### Mark Your Calendar:

- **Nov. 22** - Opening Reception & Grad Awards
- **Nov. 23** - Educational Sessions & Gala Event
- **Nov. 24** - Educational Sessions (Half Day)

### The Acuity Awards:

- Top Student
- Favourite Instructor
- Marquis Firm
- Top Disruptor
- Firm of the Future
- Top DAC Acuity Alumni
- Advisor of the Future
- Lifetime Achievement

Nominate someone you know (or yourself!).

Email registrar@knowledgebureau.com

## FDFS™ AWARDS PROGRAM

The Fellows of Distinguished Financial Services are awarded the FDFS™ Certification mark based on a criteria of demonstrated thought leadership and innovation in sharing knowledge through education, writing, lectures, coaching, leading and mentorship relating to tax, accounting, financial literacy, economic, wealth management and financial services.

FDFS™ meet annually at the Acuity Conference for Celebration, Leadership and Networking.

### Meet the Distinguished Fellows!

Explore the FDFS™ Directory at [learn.knowledgebureau.com/fdfs](http://learn.knowledgebureau.com/fdfs)

### Interested in Joining the Fellowship?

Learn more about how to become a faculty member and earn the FDFS™.

Request a KB Faculty Application today: [faculty@knowledgebureau.com](mailto:faculty@knowledgebureau.com)

## LEARN MORE:

[learn.knowledgebureau.com/vip](http://learn.knowledgebureau.com/vip)  
1.866.953.4769





# 2026 ACUITY CONFERENCE

For Distinguished Advisors  
VICTORIA, B.C | NOV. 22-24

**You're Invited to be Honoured at Your**

# GRADUATION CELEBRATION

**RSVP now and attend the full conference at  
Honoree rates!**

**Email: [registrar@knowledgebureau.com](mailto:registrar@knowledgebureau.com) to confirm  
your attendance!**

**Or use the QR Code to register online:**



**[learn.knowledgebureau.com/acuity](http://learn.knowledgebureau.com/acuity) | 1.866.953.4769**