Knowledge Bureau®

World-Class Financial Education

www.knowledgebureau.com 1-866-953-4769 registrar@knowledgebureau.com

PROGRAMMING AND CURRICULUM

AUGUST 2019 - JUNE 2020

Anytime, Anywhere Learning

Round the clock access wherever you are in the world.

Explore Your Pathways to Success

Develop the skills you'll need to thrive in the new economy.

World-Class Instruction

Personalized learning with passionate educators to help.

Knowledge Bureau®

World-Class Financial Education

Meet the Founder and President, Evelyn Jacks

Your potential is limitless™

"As Founder and President of Knowledge Bureau, I am excited about your potential to achieve new knowledge goals. We hope to welcome you to Knowledge Bureau as your educational home for continuing professional development, business, and career enhancement in the tax and financial services industries.

In addition, we would be delighted to help you kick-start your entrepreneurial endevours or leadership potential with new online and in-class courses that address your need to renew your knowledge and skills due to disruption, tax and economic changes.

Our programs include comprehensive online courses available 24/7, peer-to-peer learning in our Knowledge Bureau Education Days: one day CE Summits featuring expert instructors in major cities near you and/or our outstanding conferences. The Distinguished Advisor Conference and Business Builder Retreats will help you build your networks and your business in all aspects of the financial services."

About Knowledge Bureau

Knowledge Bureau is a widely respected education institute and publisher based in Canada. Our world-class financial education is innovative, informative, and in-depth, with an academic approach focused on knowledge, skill building, and leadership.

Since 2003, we have trained thousands of advisors to provide high-value tax, bookkeeping and financial services to individuals, families, small business owners and corporate clients. We achieve this by offering students a multi-channeled academic pathway that includes online courses, live-learning events facilitated by industry leaders, and insightful books that focus on strategic solutions in providing tax, retirement, business and wealth management services.

When you have educated over 10,000 tax and financial services professionals since 2003, your commitment to excellence becomes a hallmark of your company. At Knowledge Bureau, we're proud of our students' dedication to life-long learning and their professional achievements after graduation. Every day, their example inspires our dedicated team of leaders, managers, and administrators to continue developing and delivering world-class financial education.

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Knowledge Bureau®

World-Class Financial Education

What Our Grads Say

Douglas V Nelson, B.Comm (hons), CFP, CIM, MFA™, RWM™

"The MFA designation was my educational path to changing the way I provide advice to clients. This new knowledge enabled my team and I to realize the power in providing truly integrated advice as a Real Wealth Management™ advisory team.

The key to success today is to have a clearly defined financial planning process, and financial planning standards and benchmarks, that can then be easily communicated to clients. We have been using this approach for close to 10 years now. During this time our business has grown considerably, thanks in large part to the things we learned in this program. I would definitely recommend the MFA™ program to anyone who wishes to be a serious financial professional into today's dynamic environment."

Connie H.M. Zhu
DFA-Bookeeping Services Specialist™

"This was a priority, it was an investment. I found Knowledge Bureau not only helps to build a solid understanding in tax and finance services, it also offers a great opportunity for everyone to expand their skillset to be better positioned in an ever-changing business world. Having graduated from this designation program with honors, I have enriched my knowledge, improved professional business skills that expand my future career path. Overall. . .it is truly excellence in financial education."

Cynthia Kall
DFA-Tax Services Specialist™

"I thoroughly enjoyed the program. Each course further refined my skills . . .the course material, case studies, and related research provided a sound basis to develop my knowledge. I couldn't have benefited more even if I had a resident mentor right here in the office."

Stephanie Keller, CFP, RWM™

"Knowledge Bureau, with their first-class courses, offers a sustainable, long-term educational framework for industry professionals. This is about implementing the Real Wealth Management process from an emotional intelligence, as well as a technical point of view, to guide clients in achieving their goals."

George Donkor
CFP, CLU, MFA™, EPC

"As a Certified Financial Planner, it is important that we are proactive in terms of planning our clients affairs. Knowledge Bureau continues to provide me with relevant knowledge and strategies to help my clients navigate through the complex world of finance, life and taxation."

Halina Siemiginowski
DFA-Tax Services Specialist™

"My overall experience was a valuable one. As I am getting established in my second career as a tax professional with a public accounting/taxation practice, being able to take the courses, gain relevant knowledge and obtain a DFA designation is of great importance."

Laura Sciore
MFA™-Retirement Services Specialist Undergrad

"This course is a great review for me given my current training as a CFP and with my MBA. I have to say I really like the course presentation. The information is very straight-forward and gets right to the practical side of working with people regarding planning and living in retirement."

Paul J. Vaneyk - MFA™-Executive Business Growth Specialist Undergrad

"I vow to continually get better. This topic is near and dear to me. If I know ... I can share."

Frequently Asked Questions

What makes a Knowledge Bureau education different?

Knowledge Bureau was established in 2003 to meet the needs of highly trained professionals and business leaders who wish to specialize in complex tax, retirement and investment planning services within an inter-advisory environment.

We provide our students, who are primarily experienced practicing advisors in tax, accounting or bookkeeping, investment, insurance or financial planning practices, the opportunity to deepen knowledge, train new and returning staff, expand their practice models with new procedures and tools, and find support related to changes in tax and the economic affairs.

Courses at Knowledge Bureau are also recognized and accredited where required by many professional organizations and accrediting bodies in the tax, accounting and financial services.

Why should I consider taking a Designation Program with Knowledge Bureau?

The RWM™, MFA™, MFA-P™ and DFA-Tax or Bookkeeping Services Specialist™ designations identify a select group of professional advisors who have completed a program of advanced studies in financial education. The programs available through Knowledge Bureau lead to specialization in retirement income planning, tax filing and planning services, bookkeeping services, investment planning services, succession and estate planning, and personal financial planning. The new MFA™- Executive Business Growth Specialist Program helps business owners and leaders scale up their enterprises.

How much time do I need to finish an online course?

The total study time for every program is different. Please consult curriculum details for more information.

How can I learn more about detailed course descriptions?

There are four ways to learn more about our programs and courses:

1. Review them in this course catalogue. Use the handy Table of Contents or Index!

2. Select your faculty of interest from the home page of our website, where you will be able to drill down into specific course descriptions.

3. Take a free trial of any one of our courses and experience the Virtual Campus.

4. For personal assistance call 1-866-953-4769 toll-free, or fill out the “Let’s Connect” form on our website to talk with one of our friendly educational consultants.

Frequently Asked Questions

Are my tuition fees tax deductible?

Knowledge Bureau is a private, designated educational institute and our tuition fees qualify for the Tuition Fee Tax Credit if over $100. This amount includes the costs for all self-study courses and various Knowledge Bureau Education Days including CE Summits, Business Builder Retreats (BBR) and the Distinguished Advisor Conference™ (DAC). To claim the deduction on your tax return, you'll need a completed Form T2202A Tuition and Enrolment Certificate. Note fees for attending the Distinguished Advisor Conference may be subject to different rules for deductibility based on your employment/self-employment status. After please see IT-357.

Can I use the designation and certificate marks behind my name?

Knowledge Bureau certification marks are conferred upon successful graduates who meet program requirements. Successful graduates are granted the rights to use the designation earned from Knowledge Bureau on their letterhead and business cards after receiving an official Certificate of Distinction, which signifies their accomplishments to their clients. Standards of Conduct must also be met, as well as ongoing continuing education through one of Knowledge Bureau's Workshops or Distinguished Advisor Conference.

Note: Some industries require graduates to receive permission from their managers or compliance officers regarding how they communicate their academic credentials.

Is there an exam and when do I take it?

Yes, there is a final exam. It is taken online in the comfort of your own home or office and is an open-book test. There is no extra charge to take the examination for each course. Rewrite opportunities are possible if required.

Are there early registration, or volume discounts?

Students who commit to a long term study plan (more than one course) save money on tuition fees. Also, those who have taken a Knowledge Bureau program in the past year (any online course or Knowledge Bureau Education Days) qualify for our affinity program and may identify themselves as an "alumni" for preferred pricing. Volume discounts are also applied to offices training multiple staff members in the same or a variety of courses. See our study with a buddy plan.

What are the requirements for program entry?

Please demonstrate a high school standing and existing employment or entrepreneurship within the tax, accounting, bookkeeping or financial services or designation, certification, or license to practice in the industry sector and/or at least three years experience in the industry sector for entry to the designation program. In addition, students who are mentoring with or employed by persons who meet these requirements may be accepted as well.

Knowledge Bureau®

World-Class Financial Education

ONLINE COURSES AND PROGRAMS

Discover Your Pathway and learn *your* way

Make a great decision: choose 1 course, choose more than 1, or choose to take the entire designation program.

Save money when you make multiple course selections.

Everything is included in your tax-deductible tuition fees

- Your free trial is an all-inclusive component so you can enrol risk-free

- Personal consultation for course selection
- Virtual campus orientation
- Lesson and study plans
- Personal instructor support by email
- Comprehensive Knowledge Journal
- EverGreen Online Research Library
- Student versions of pro tax & accounting software
- Knowledge Bureau calculators for financial planning
- Testing and certification
- CE/CPD accreditation

For more details visit www.knowledgebureau.com
or call toll-free 1-866-953-4769

Knowledge Bureau®

World-Class Financial Education

1 WHO IS THE REAL WEALTH MANAGER?

A Real Wealth Manager is the client's most trusted financial advisor as the strategist who leads all the other specialists in the execution of the clients' strategic financial plan. Demonstrating deep and broad knowledge in tax-efficient investment, retirement and estate planning, the RWM™ is the coveted role deservedly filled by this knowledgeable professional.

2 THE RWM™ ADVANTAGE: CERTIFIED SKILLSETS

Advisors authorized to use RWM™ behind their names have a deep and broad understanding of both the behavioral and financial skills required to manage family wealth over several generations. Using extensive skills in providing tax efficient Real Wealth Management services, clients are presented with an unparalleled opportunity to work with a primary advisor who has assembled a trusted team of specialists to help guide financial requirements throughout various family lifecycles.

In collaboration with the family, the RWM™ develops a strategy and follows a process to manage inter-generational wealth on an after-tax basis. This sets the standard for decision-making for investment, retirement, business, succession and estate planning. The team is then responsible for the stewardship of wealth from one generation to the next.

3 MEETING HIGH STANDARDS - COMPLEMENT YOUR CREDENTIALS

The RWM™ is earned with the completion of a 12 module program. Ongoing use of the certification mark requires 30 hours of continuing professional development in each two year cycle. Best of all, the RWM™ complements other industry designations, requiring the graduate to be in good standing and practice with the highest standards of conduct.

WHAT OUR GRADUATES SAY:

"A well-organized and comprehensive course written in simple, easy to understand language. I have learned the principles in Real Wealth Management, its process and applications. I liked all the different calculators to assist in financial decision making. I enjoyed the audio presentation that outlines each lesson's key learning objectives, which is an excellent supplement to the Knowledge Journal. Excellent tax research explanatory notes."

- Richard L., RWM™

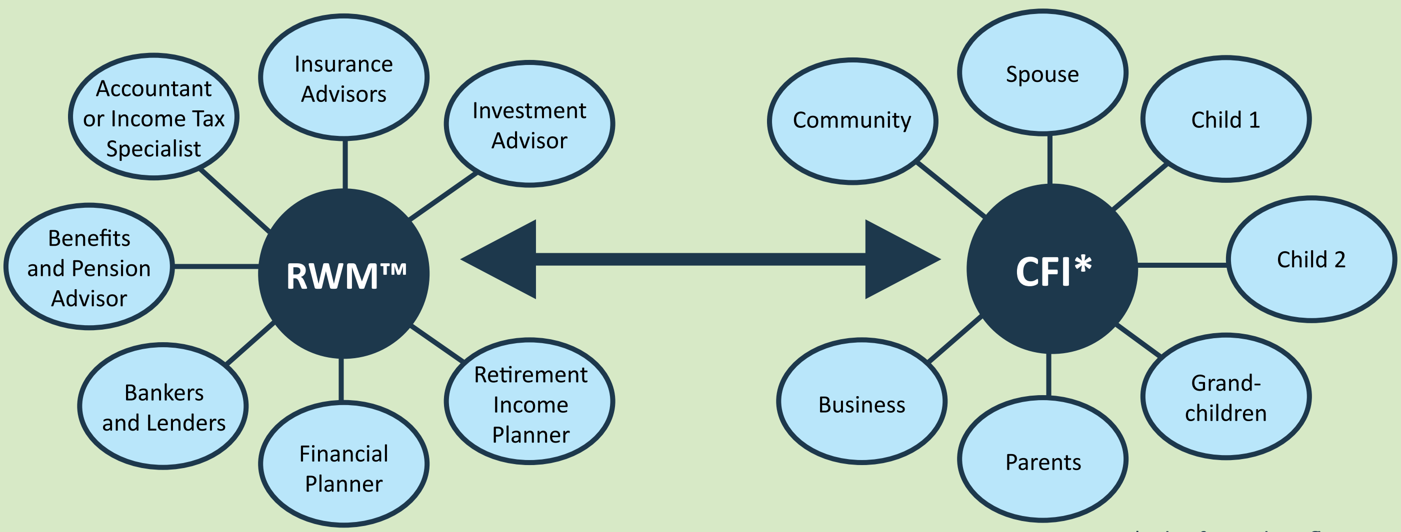
4 WHAT'S INVOLVED?

With the training, tools and processes, a RWM™ is better positioned to consider a client's situation with a higher standard of care. Over the long term, the RWM™ contributes not only as a knowledge specialist, but most importantly, as the primary advisor trained in the inter-advisory discipline of Real Wealth Management™. Specifically, the RWM possesses:

1. Deep Knowledge in a field of specialization suitable to their clients' needs:

- Investment Income Services
- Retirement Income Services
- Tax Planning Services
- Succession and Estate Planning Services

2. A Strategy and Process for Joint Decision-Making:



* Chief Family Influencer

5 SYNONYMOUS WITH HIGH STANDARDS

We are proud to be the exclusive post-secondary educational institution offering the RWM™ Certificate of Distinction as well as the MFA™, MFA-P™ and DFA-Specialist™ Designation Programs, each of which lead financial professionals to a deeper level of specialization in their chosen field of expertise. Tens of thousands of professionals in the financial services, tax and accounting fields have trained with us over the years. **A Knowledge Bureau Education is synonymous with high standards of excellence.** Our programs include self-study courses conveniently available online, regional education days known as CE Summits, conferences, books, subscription services and most recently the RWM™ and MFA-P™ Programs.

- Evelyn Jacks, Founder and President

"It is necessary for professionals, who are in a position of trust, to provide a basic education in personal finance, tax situations, wealth management and succession/estate planning to each client." - Troy Harrison, MFA™- Business Services Specialist, RWM™

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World-Class Financial Education

Structure your advisory practice for the future with the elements of Real Wealth Management Program and earn your RWM™ certification.

6 FEATURES OF THE REAL WEALTH MANAGEMENT PROGRAM

12 Comprehensive Modules | 15 Professional Software Tools | Personalized Instruction

1. DEFINING REAL WEALTH MANAGEMENT
2. THE STRATEGIC APPROACH IN REAL WEALTH MANAGEMENT
3. THE COSTS OF BUILDING WEALTH
4. OBJECTIVE-BASED PLANNING AND JOINT-DECISION MAKING
5. MANAGING SOURCES OF INCOME AND CAPITAL
6. THE REAL WEALTH MANAGEMENT PROCESS
7. ELEMENTS OF RWM: ACCUMULATION
8. ELEMENTS OF RWM: GROWTH
9. ELEMENTS OF RWM: PRESERVATION
10. ELEMENTS OF RWM: TRANSITION
11. LEADING WITH THE REAL WEALTH MANAGEMENT STRATEGY
12. ADVANCED TAX UPDATE FOR REAL WEALTH MANAGERS

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7 WHAT SKILLS DOES A REAL WEALTH MANAGER HAVE?

The RWM™, the primary advisor in providing comprehensive and collaborative wealth advisory services, is specifically trained to lead strategic decision-making by an inter-advisory team with family stakeholders. The steps to this approach include:

- **Possessing** deep knowledge in the advisor's field of practice
- **Acting** as the **primary advisor** through a strategic process of decision making
- **Listening** for the client's life and financial triggers
- **Strategizing** using the "Four RWM Elements": Accumulation, Growth, Preservation and Transition of sustainable wealth
- **Managing** the team of specialists to provide required expertise for financial solutions
- **Implementing** the RWM strategy on an efficient after-tax, after-cost basis with all stakeholders
- **Analyzing** financial data expertly and consistently over time to meet financial milestones
- **Reviewing** and adjusting the strategy and process to meet ongoing client objectives

8 CLIENTS WANT CUSTOMIZED SOLUTIONS

According to a recent study* by the CFA Institute, "the connection between professional skills and customer outcomes must become more symbiotic ... wealth managers must demonstrate greater relevance to the current and future needs of clients and prospects." The RWM™ cements his or her relevance to the family by confidently delivering customized financial strategies based on client objectives and goals with a process for accountable solutions over time. Your clients will appreciate the opportunity to make sound financial decisions with a most trusted advisor who really knows them well and can help them visualize the future while navigating a complicated financial world. The result is a pathway to true affluence and peace of mind.

*The Value of Premium Wealth Management, 2017

9 EARN YOURSELF A PRESTIGIOUS CERTIFICATE AND THE RWM™

An ever-growing number of advisors from all sides of the financial services are competing for clients. To avoid getting "lost in the noise" and to survive and grow, leading advisors can now differentiate themselves with this advanced level designation that complements the standard designations held by many planners, advisors and accountants.

- Become the **primary advisor** through all market conditions and life cycles
- Enhance your skills, fast-track your career and elevate client services
- Increase assets, revenue, team efficiency and profitability
- Work effectively with and increase referrals from other professionals
- Differentiate yourself from the mass of designation holders with a unique education

CHOOSE KNOWLEDGE BUREAU: YOUR TRUSTED EDUCATION PARTNER.

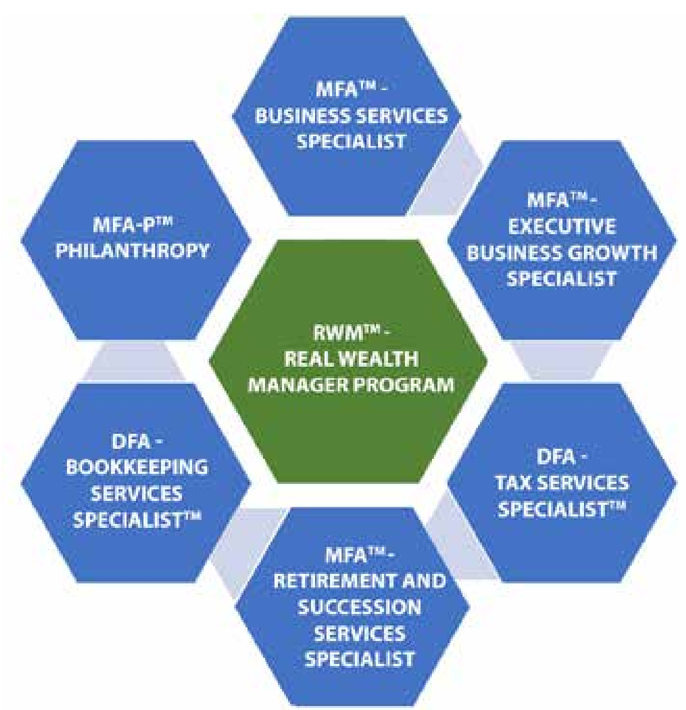
Apply a strategic approach to professional wealth management with all the specialists on your client's team.

Take the first steps now ... Become a Realth Wealth Manager

We would like to create a lasting learning relationship with you and your team, for all your professional development and continuing education requirements including the attainment of the RWM™ certification mark.

COUNT ON US FOR:

- Practical training you can use right away with your team and clients
- Unparalleled personalized attention to ensure your success in the program
- Flexible learning format to fit even the busiest schedules – conveniently online and available 24/7
- Tax deductible tuition fees which qualify for the Tuition Fee Credit on your tax return
- All course materials, custom-designed software tools, research library, quizzes, testing and personal support are included in the single fee
- No risk, money-back guarantee – take a free trial anytime
- Continuing education credits from most professional bodies and regulators



"Knowledge Bureau, with their first-class courses, offers a sustainable, long-term educational framework for industry professionals. This is about implementing the Real Wealth Management process from an emotional intelligence, as well as a technical point of view, to guide clients in achieving their goals"
-Stefanie Keller, CFP, RWM™

Open Your Own Bookkeeping Business or Start a Career in the Accounting Industry

DIFFERENTIATE YOURSELF

Earn Your Designation as a DFA- Bookkeeping Services Specialist™

ESPECIALLY FOR:

- Accounting and Tax Practitioners
- Bookkeepers
- Payroll Accountants
- Credit and Debt Counsellors
- Business Consultants

FACULTY OF BUSINESS ACCOUNTING Your Potential is Limitless™

Only with:

Knowledge Bureau®
World-Class Financial Education

With your in-depth knowledge and high-level skills, you'll assist clients with accurate data processing and compliance procedures. You'll offer trusted advice on all transactions.

BECOME A DISTINGUISHED FINANCIAL ADVISOR!

Qualified professional bookkeepers with deep knowledge to help business owners stay onside with the CRA and on top of their financial statements are in high demand. Take a bold step: Earn your **DFA-Bookkeeping Services Specialist™ Designation**.

TAKE A FREE TRIAL TODAY!

EVERYTHING IS INCLUDED:

> Personal course selection consultation and virtual campus orientation
> Lesson plans and study plans
> Personal instructor support by email
> Comprehensive Knowledge Journal
> EverGreen Explanatory Notes - Online Research Library
> Practical case studies using professional software
> Calculators and tools you can use immediately
> Testing and certification
> CE/CPD accreditation by various professionals

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Join thousands who have earned their credentials in the comfort and convenience of their own home or office, at their own pace. **Take a free trial and make a risk-free decision.**

"The course was detailed enough to understand the basics of how accounting software, such as SAGE and QB Online work. It covers everything and is considerably more affordable than a traditional institution. The ability to work at my own pace was critical!

- Mike Donselaar

DFA-Bookkeeping Services Specialist™ Undergrad

For more details visit www.knowledgebureau.com or call toll-free:1-866-953-4769

LEVEL I ADVANCE YOUR CAREER WITH A DIPLOMA!

Complete 3 courses to earn a Certified Bookkeeping Practitioner™ diploma!

As a Certified Bookkeeping Practitioner™, you'll have the experience and credentials to:

> Provide bookkeeping services to the lucrative small business market

> Successfully manage the books for your business

> Master payroll, managerial accounting, transition and succession planning for a variety of ventures.

1

Bookkeeping for Small Businesses

Bookkeeping for Small Business is the perfect course for professionals in the bookkeeping, tax and financial services who wish to train their administrative staff to prepare company books, or for those with the professional role of preparing books for others. Bookkeepers who know how to run software, but have no education in theoretical accounting also benefit from taking this course, which is the first in the Bookkeeping Services Specialist designation program.

Knowledge Journal:

- **The Roles and Responsibilities of the Bookkeeper**
- **Types of Organizations, Fiscal Periods and Accounting Cycles**
- **Types of Accounts, the Basic Accounting Equation and The Chart of Accounts**
- **General Ledger, Trial Balance and Special Accounts**
- **Journals, Registers and Ledgers - I**
- **Journals, Registers and Ledgers - II**
- **Fundamental Cash-basis and Accrual Accounting**
- **Period-end Procedures**
- **Documentation, File Maintenance and Due Dates**
- **Payroll: an Introduction**

2

Advanced Payroll for Small Businesses

Over the past year, there have been several important changes to payroll rules, creating an increased demand for competent, knowledgeable bookkeepers who can administer payroll. An incorrect approach to the technical side of payroll poses a risk to both employers and their employees: it can cost them money, and cause them to incur penalties with the Canada Revenue Agency. Advanced Payroll will help you become a more astute compliance manager that prepares accurate payroll, while being a shrewd negotiator when helping your clients with employment contracts that address the after-tax benefits for employees and their family members.

Knowledge Journal:

- **The Payroll Cycle**
- **Hiring, Employee Contracts, and Employment Standards**
- **Employee Compensation**
- **Owner Managers**
- **Statutory Deductions**
- **Other Deductions**
- **Taxable and Tax Free Benefits**
- **Remittances, Audits and Penalties**
- **Termination and Severance**
- **Year-End Reporting**

3

Debt and Cash Flow Management

This course is ideal for professionals in financial services looking to gain the skills needed to proactively help clients plan for and manage their financial health. The focus is on reporting on improvements in debt and savings over time to create a healthy balance sheet and facilitate responsible use of debt in building family wealth.

Knowledge Journal:

- **The Effect of Debt on Wealth Management**
- **Financial Assessment: Data Collection for Debt and Cash Flow Analysis**
- **Better Credit Scores: Prerequisites for Successful Borrowing**
- **Mortgages: A Better Mortgage Reduction Plan**
- **Managing Consumer Debt**
- **Vehicle Loans and Leasing**
- **Managing Fixed and Variable Expenditures**
- **Managing Debt Through Late Life Milestones**
- **Presenting Debt Reduction Solutions for Younger Families**
- **Business Debt**

"I started the program because I wanted that piece of paper, and the confidence to do what I do. I run two home-based businesses. That makes it all the more important to me to gain more knowledge and confidence because I do not have anyone to fall back on when I have questions."

- Amanda McAskill, DFA - Bookkeeping Services Specialist™ Undergraduate

LEVEL II
STAND OUT IN THE INDUSTRY WITH A PROFESSIONAL DESIGNATION

Complete the diploma program plus add these 3 courses to earn your designation (6 courses in total)!

As a DFA - Bookkeeping Services Specialist™ you will have the experience and credentials to:

> Help your clients make better financial decisions and earn greater profits

> Guide high net worth clients with the expertise they need to grow their business ventures

> Ensure clients avoid costly financial mistakes and improve their financial health

4

Managerial Accounting and Budgeting

This course in the Bookkeeping Services Specialist designation program is the perfect course for professionals in bookkeeping, tax and financial services to gain the skills needed to assist or direct the budgeting process. This course contains references to IFRS and ASPE as well as an updated QuickBooks example.

Knowledge Journal:

- **The Role of the Management Accountant**
- **Basic Account Analysis**
- **Introduction to Cost Accounting**
- **Budgeting Basics**
- **Fixed Assets**
- **The Sales/Production Budget**
- **Other Budget Items**
- **Cash Flow Budgeting**
- **Periodic Management Accounting Functions**

5

Accounting for Multiple Business Profiles

In this course, you will learn to manage the bookkeeping functions for a variety of companies, using all the modules of the program (with the exception of Payroll) to deliver financial results for the simplest to a complex company. Using the features of SAGE 50 and Intuit QuickBooks Desktop, learn advanced bookkeeping for a variety of business profiles.

Knowledge Journal:

- **Commonalities of Bookkeeping for Various Business Enterprises**
- **Advanced Sales Tax Issues**
- **Partnerships and Joint Ventures**
- **Builders**
- **Retail Outlets**
- **Importers/Exporters**
- **Agricultural Businesses**
- **Trusts**
- **Other Business Profiles**
- **Not for Profits**
- **Introduction to Advanced Business Issues**

6

Accounting for Business Growth and Transition

This course addresses a range of areas that might be encountered during the evolution and growth of a company. Topics include organizational structures, consolidated financial statements, foreign exchange, due diligence requirements and approaches for structuring a business transition. In addition, those who work in the accounting function will gain an understanding of how to take a leadership role in creating a value centered department that could help to support the growth and development initiatives that occur over the life cycle of a business.

Knowledge Journal:

- **Introduction to Organizational Structures**
- **Consolidated and Combined Financial Statements**
- **Foreign Currency Transactions**
- **Purchase of a Business**
- **Sales of a Business**
- **The Sale of Assets**
- **The Sale of Shares**
- **Business Succession**
- **Tax Planning in Succession**
- **The Role of a Value Centered Accounting Function**

Your study plan is flexible and self-paced. Assume 30 hours for each course.
Take up to 3 months for one, 9 months for the diploma program and 18 months for the designation.

TAKE A **RISK-FREE TRIAL**
knowledgebureau.com

CHOOSE KNOWLEDGE BUREAU: YOUR TRUSTED EDUCATION PARTNER.

Apply a strategic approach to professional wealth management with all the specialists on your client's team.

Take the first steps now ...
Become a DFA-Bookkeeping Services Specialist™
One of 7 designation programs from Knowledge Bureau

We would like to create a lasting learning relationship with you and your team, for all your professional development and continuing education requirements.

COUNT ON US FOR:

- Practical training you can use right away with your team and clients
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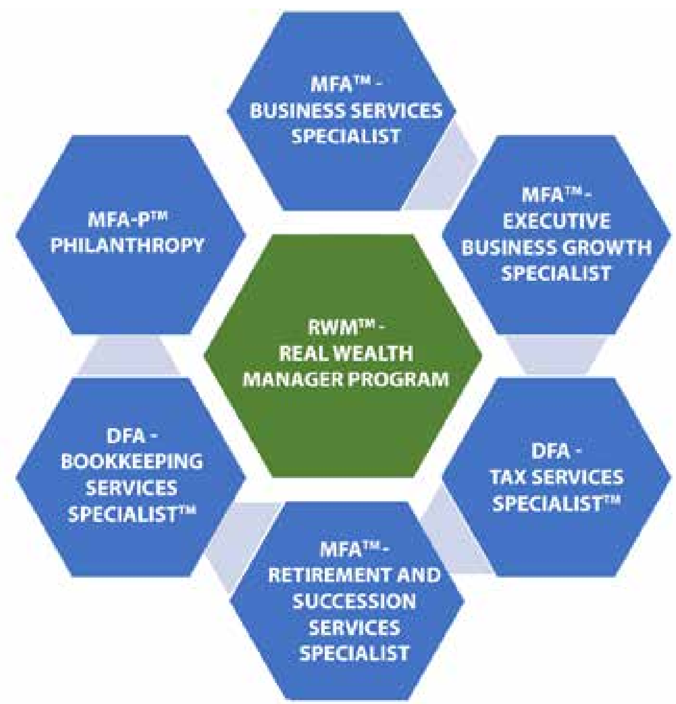

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- Connie H.M. Zhu, DFA-Bookkeeping Services Specialist™

Open Your Own Income Tax Filing Business or Train Your Staff

DIFFERENTIATE YOURSELF

Earn Your Designation as a DFA - Tax Services Specialist™

ESPECIALLY FOR:

- Accounting and Tax Practitioners
- Tax and Estate Advisors
- Wealth Managers
- Insurance Advisors
- Financial Planners

FACULTY OF PERSONAL TAXATION   Your Potential is Limitless™

Only with:

Knowledge Bureau®
World-Class Financial Education

Gain the knowledge and skills you'll need to create tax advantages for your clients. Offer high-value advice on the best after-tax outcomes for multiple generations in client families.

BECOME A DISTINGUISHED FINANCIAL ADVISOR!

Earn your **DFA - Tax Services Specialist™ Designation** and expand on the role of a traditional tax preparer. Offer holistic tax filing and planning services to help families reduce taxes and supplement low income by taking advantage of all available tax credits.

TAKE A FREE TRIAL TODAY!

EVERYTHING IS INCLUDED:

> Personal course selection consultation and virtual campus orientation
> Lesson plans and study plans
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Join thousands who have earned their credentials in the comfort and convenience of their own home or office, at their own pace. **Take a free trial and make a risk-free decision.**

"I am working on my second degree with the Knowledge Bureau, and I strongly recommend their courses for anyone in the financial services field. They have without a doubt, the most practical and effective approach to helping advisors serve their clients."

Chris Valentine,
DFA-Tax Services Specialist™ and MFA™-Retirement and Succession Services Specialist, RWM™

For more details visit www.knowledgebureau.com or call toll-free:1-866-953-4769

ADVANCE YOUR CAREER WITH A DIPLOMA!

Complete 3 courses to earn a diploma as a Certified Personal Tax Practitioner™

More than a data entry clerk, the highly skilled **Certified Personal Tax Practitioner™** is a professional who understands CRA's EFILE, NETFILE and File My Return, but brings so much more to the client relationship: the precise application of all the tax preferences the client is entitled to because a thorough client interview was conducted.

1

Income Tax Filing Fundamentals

This course is designed for prospective tax filers with no experience. It starts with who and what is taxed. Prepare simple tax returns by the end of the first chapter! Then learn how to file returns for singles, families, students, retirees and investors. Along the way, know how to take advantage of the most common deductions and credits available.

Knowledge Journal:

- Introduction to Canadian Tax
- Tax Filing for Single Employees
- Tax Filing for Employees
  - Credits and Deductions
- Tax Filing for Families
  - With Children
- Tax Filing for Families
  - Seperation or Divorce
- Tax Filing for Students
- Tax Filing for Retirees
- Tax Filing for Investors
  - Non-Registered Accounts
- Tax Filing for Investors
  - Capital Property
- Basic Tax Planning

2

Personal Tax Filing and Planning

Perfect for new owner-managers and new entrants into the tax filing market including new seasonal staff needed in a busy tax accounting office. Graduates are thoroughly trained on the latest tax changes using professional tax software in a case study approach. Research skills are honed in the comprehensive online research library known as EverGreen Explanatory Notes. Create "what if" scenarios for the upcoming year using the sophisticated tax estimator tools from the Knowledge Bureau Toolkit in between software updates.

Knowledge Journal:

- Introduction to Income Taxation in Canada
- Using Software to Prepare the Return
- Filing the Return
- Low Income and Credit Filers
- Reporting Employment Income
- Claiming Employment Deductions
- Families and Children
- Reporting Investment Income
- Pensioners
- Budget Changes: What's Coming Up Next Year?

3

Advanced Tax Filing and Planning

Fully updated to the latest federal Budgets, this comprehensive course delves deeply into the deductions, tax credits, and tax calculations on the personal tax return, with an emphasis on capital gains and losses, and registered and non-registered investment income sources. It overviews common and advanced client profiles, while sending students to the dynamic commentary in EverGreen Explanatory Notes.

As the title implies, it challenges more experienced practitioners and returning staff to busy tax practices.

Knowledge Journal:

- Update and Review
- Family Filing
- Employees - Part 1
- Employees - Part 2
- Retirement
- Investors
- Asset Management
- Life Events
- Business Starts and Stops
- Death and Estate Planning

"I am proud to say that I have achieved the Designation, and most of my staff are well on their way to either a diploma or a designation."

- Wayne Blackmere, DFA - Tax Services Specialist™

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DIFFERENTIATE YOURSELF WITH A PROFESSIONAL DESIGNATION

To earn your DFA - Tax Services Specialist™ designation, complete the diploma program plus complete these 3 courses (6 courses in total)!

Be a trusted contributor to a multi-stakeholder approach in family wealth management. Earn your **DFA - Tax Services Specialist™** designation and offer high value advice on the best after-tax outcomes for multiple generations in a taxpayer's family.

4

Tax Accounting for Proprietorships

This course is designed to teach professional advisors tax preparation for proprietorships, using CRA's prescribed forms: Statement of Business or Professional Activities, Capital Cost Allowance statements, worksheets for reporting home office, automobiles, other assets, inventory control, and cost of goods sold. Students may use their own tax preparation software. For those without tax preparation software, student versions of Intuit's ProFile Software Suite, DR Tax's DT Max, and TaxCycle Suite are provided with the course.

Knowledge Journal:

- **Taxation of Income from a Proprietorship**
- **Reporting Requirements: GST/HST**
- **Claiming Business Expenses**
- **Transactions Involving Business Assets**
- **Home-based Businesses**
- **Hiring Human Resources**
- **Inventory-Based Businesses**
- **Disposing of and Replacing a Business**
- **Farming and Fishing Enterprises**
- **Professionals and Partnerships**

5

Tax Accounting on Death of a Taxpayer

This course deals comprehensively with the taxation of individuals at death. Gain a thorough understanding of how income and capital accumulations are taxed on final returns and learn strategies to minimize taxes.

Students will learn how to manage the new relationship with CRA when taxpayers die, as well as how each type of income is reported, options regarding elective returns, and opportunities to defer taxes. They'll learn how to claim all deductions and credits that are allowed on each return for the deceased and the surviving spouse, too.

It's an important professional service in demand in an aging demographic.

Knowledge Journal:

- **Death and Taxes**
- **Returns in the Year of Death**
- **Reporting Income**
- **Capital Assets**
- **Registered Accounts**
- **Claiming Deductions**
- **Non-Refundable Credits**
- **Refundable Credits**
- **The Estate**
- **Avoiding Probate Fees**

6

Fundamentals of Filing Trust Returns

This course introduces the types of trusts that may be created in Canada and how each of them is taxed. Students will learn how to prepare T3 returns as part of the case study exercises in the course. Case studies include the filing of trust returns, slips, and slip summaries for trusts.

The students will also learn how to optimize taxes payable on income earned by at trust by choosing to pay the taxes through the trust or allocating income to beneficiaries and having them pay the taxes on those allocations. The Trust Tax Estimator tool, provided with this course, will help you to minimize taxes on trust income.

Knowledge Journal:

- **Introduction to Trusts**
- **The T3 Return**
- **Identification**
- **Income of the Trust**
- **Deductions**
- **Dealing with Losses**
- **Allocation of Trust Income**
- **Calculation of Tax**
- **Filing**
- **Other Topics**

Your study plan is flexible and self-paced. Assume 30 hours for each course.
Take up to 3 months for one, 9 months for the diploma program and 18 months for the designation.

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Apply a strategic approach to professional wealth management with all the specialists on your client's team.

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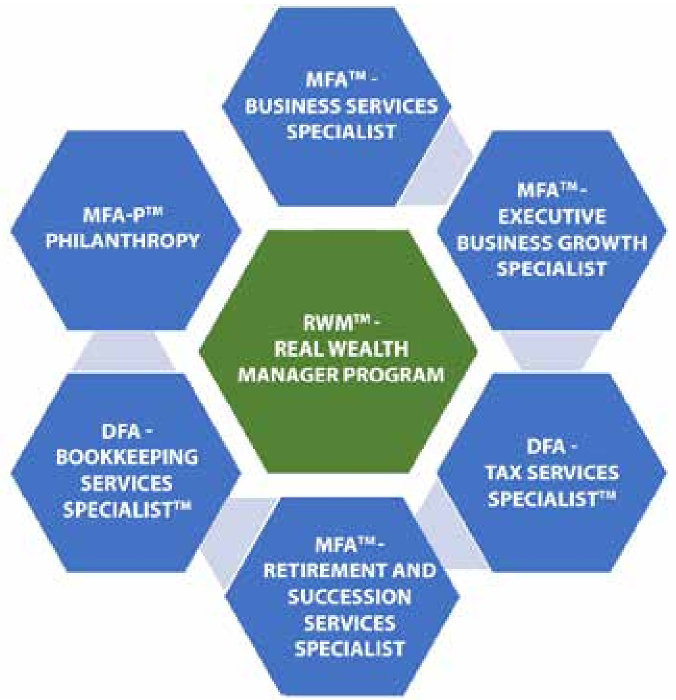
- Flexible learning format to fit even the busiest schedules – conveniently online and available 24/7
- Tax deductible tuition fees which qualify for the Tuition Fee Credit on your tax return
- All course materials, custom-designed software tools, research library, quizzes, testing and personal support are included in the single fee
- No risk, money-back guarantee – take a free trial anytime
- Continuing education credits from most professional bodies and regulators



"As a German accountant who came to Canada in the year 2000, I sought an easily accessible, sophisticated and affordable solution to gain knowledge of Canadian accounting rules and regulations. No other post secondary institution offered the same opportunity. The unique combination of working, practicing and learning - through hands-on training in seminars and workshops, and through online courses with easy-to-follow course material that was challenging and effective - allowed me to build and expand my knowledge, resulting in increasing confidence and competence to build and grow my business."
- Frank Arnold, DFA-Tax Services Specialist™

Build a Reputation for Excellence with Corporate Tax Filing and Planning

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ESPECIALLY FOR:

- Accounting and Tax Practitioners
- Business Consultants
- Owner - Managers
- Financial Planners
- Insurance Advisors

FACULTY OF CORPORATE TAXATION Your Potential is Limitless™

Only with:

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You'll help your clients better understand their financial decisions through the lens of corporate taxation. As a trusted advisor, you'll deliver a comprehensive range of high-level tax-effective filing and tax planning services.

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Highly-qualified specialists in tax compliance and planning with corporate owner-managers and incorporated professionals are in high demand. Take a bold step to a new career or business venture: earn your **MFA™ - Business Services Specialist Designation**.

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> Personal instructor support by email
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> Practical case studies using professional software
> Calculators and tools you can use immediately
> Testing and certification
> CE/CPD accreditation by various professionals

Knowledge Bureau is a widely respected education institute and publisher based in Canada. Our world-class education is innovative, informative, and in-depth, with an academic approach focused on knowledge, skill building and leadership.

Join thousands who have earned their credentials in the comfort and convenience of their own home or office, at their own pace. **Take a free trial and make a risk-free decision.**

"It is important that we are proactive in terms of planning our clients' affairs. Knowledge Bureau continues to provide me with relevant knowledge and strategies to help my clients navigate through the complex world of finance, life and taxation."

- George Donkor

DFA-Tax Services Specialist™, MFA™

For more details visit www.knowledgebureau.com or call toll-free:1-866-953-4769

DIFFERENTIATE YOURSELF WITH A DIPLOMA!

Complete 3 courses to earn a diploma as a certified business tax practitioner.

Understand family-owned enterprises throughout the lifecycle of the business - from startup to successful transition. That insight requires a firm understanding of the latest tax changes for incorporated family businesses, including T2 filing, family income splitting and the taxation of active and passive income.

1

Corporate Income Tax Fundamentals

This course serves as an introduction to the filing of a corporate income tax return for small business operating under a corporate structure as a Canadian Controlled Private Corporation (CCPC). From a company's transformation from Proprietorship through to Corporation, this course will teach you the fundamentals of filing a T2 return for the majority of small business corporations operating in Canada today.

Knowledge Journal:

- Basis of Reporting Income
- Understanding the Corporate Balance Sheet
- Understanding Shareholder Equity
- Sources of Corporate Income
- Creating an Audit Trail for CRA Purposes
- Completing the T2 Return
- Tax Reserves
- Shareholder Remuneration
- Corporate/Shareholder Integration Theory

2

Tax Planning for Incorporated Professionals

This course will focus on personal and corporate tax planning for small to medium sized businesses, owned and operated by professionals, with a special focus on financial advisors and medical practitioners. Retirement and succession planning is an integral part of the course.

Gain an understanding of the tax rules pertinent for professional corporations, including access to the Small Business Deduction limit and taxation of income held within a corporation.

Knowledge Journal:

- Tax Rules for Professional Corporations
- Incorporated vs Non-Incorporated Professional Businesses
- Corporate Structures
- Shareholder Remuneration
- Corporate/Shareholder Integration Theory
- Using the PC for Family Benefits
- Retirement Planning for the Incorporated Professional
- Getting the Business Ready for Sale
- Selling the Professional Practice
- Succession Planning – Top Ten Tips

3

Tax Planning for Corporate Owner-Managers

Learn to define the components of compensation, which include salary, dividends, and bonuses, their tax attributes and the opportunities and/or constraints imposed by the Income Tax Act. New tax legislation has created "new realities" for owners of private corporations and they have added considerable complexity to the tax component of this process. Learn to provide advice throughout the year with a view to minimizing the total amount of income taxes paid by the family.

Knowledge Journal:

- The Taxation of Business Income and Its Integration in Personal Taxation
- Understanding Family Compensation Requirements
- Income Tax Treatment of Salary
- Income Tax Treatment of Dividends
- Other Compensation Issues - Benefits, Shareholder Loans
- Income Splitting, Kiddie Tax, Tax on Split Income
- Basic Issues in Using a Holding Company or Trust
- Registered Deferred Income Plans
- Unregistered Deferred Income Plans
- Planning Pitfalls - the Capital Gains Deduction, CNIL, ABIL's

"This program was very challenging and the information contained was valuable to me in my practice. I plan to keep my journal nearby as a reference when required. This is a very valuable program for anyone in private practice."

- Heather McLeod, MFA™ - Business Services Specialist

ADVANCE YOUR CAREER WITH A PROFESSIONAL DESIGNATION

To earn your MFA designation, complete the diploma program plus complete these 3 courses (6 courses in total)!

Looking for a way to stand out in the competitive tax services industry and attract more business? Earn your MFA™ - Business Services Specialist designation to advance your business (or career) and guide clients through succession planning, valuations and transitions. You will be able to provide a superior level of service that will continue to pay off throughout your career.

4

Business Valuation for Advisors

This course is designed in a practical format and will help an advisor become a valuable resource to their clients when considering business valuation issues. Key concepts include understanding the notion of value, company specific and market based approaches for estimating value, the stages of the business transaction process, value and investment transactions and the implications of financial performance on value.

Knowledge Journal:

- **Introduction to the Notion of Value**
- **Valuation Approaches: Company Specific**
- **Valuation Approaches: Market Based**
- **Valuation Considerations: Issues that Could Impact Value**
- **Business Transactions: Preparation Stage**
- **Business Transactions: Negotiation and Due Diligence Stage**
- **Business Transactions: Closing and Transition Stage**
- **Value and Investment Transactions**
- **Financial Performance and Valuation Implications**
- **Selected Topics in Valuation**

5

Cross Border Taxation

Advisors who work with affluent boomers must be prepared to discuss cross border taxation with a comprehensive general knowledge, as well as recognize and advise on how certain actions on both sides of the border affect a person's tax situation.

Knowledge Journal:

- **Residency**
- **Immigration and Emigration**
- **Snowbirds**
- **Owning Property as a Non-resident**
- **Canada - U.S. Tax Treaty**
- **U.S. Citizenship**
- **Canadian and U.S. Investments (including FATCA)**
- **U.S. Estate and Gift Tax**
- **Renouncing U.S. Citizenship**

6

Advising Family Businesses

It is widely accepted that the majority of family businesses do not survive past the first or second generation. This represents an unfortunate loss, not only for the family that relies on this income for financial stability, but also for Canada's economy. Family businesses have unique opportunities and challenges, and require advisory assistance with this in mind.

With this course, you will learn how you can help clients beat the succession odds by better understanding the planning process today.

Knowledge Journal:

- **Understanding the Family Business**
- **How to Work in Alignment with Your Family Business Clients**
- **Developing a Shared Vision**
- **Understanding Family Dynamics and Systems**
- **Planning and Real Wealth Management**
- **Advisory Products and Services**
- **The Priorities Pyramid**
- **The Succession Mapping Process**
- **Structuring Retirement Income**
- **Advising Family Businesses**

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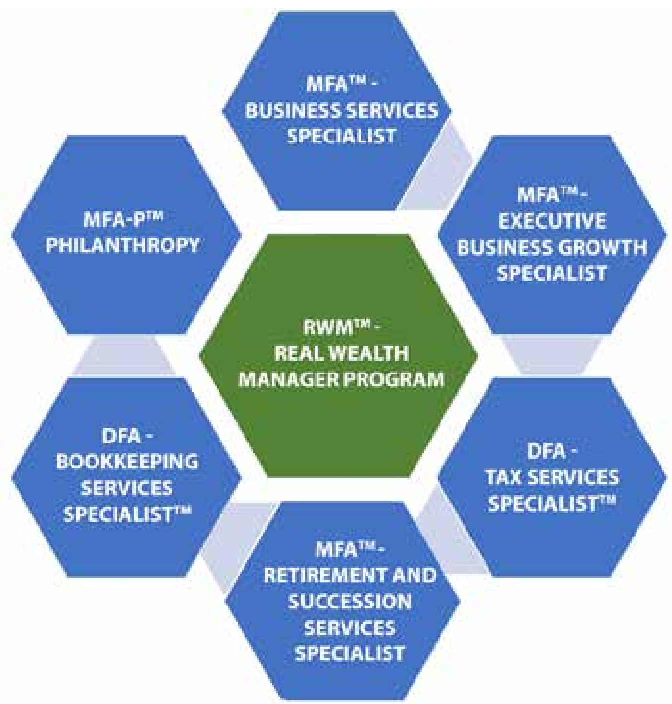

"Very pleased. . .excellent customer service was provided with quick responses on any questions that I had sent in. The case studies and quizzes were excellent in testing the knowledge learned"

- Siegfried Merten, MFA™

Earn Specialized Credentials to Have High-Value Legacy Conversations

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ESPECIALLY FOR:

- Accounting and Tax Practitioners
- Estate Planning Lawyers
- Gift Planning Advisors, Trust Officers
- Wealth Advisors, Financial Planners
- Insurance Advisors

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Become a certified professional in the evolving field of philanthropy. Build trusting relationships with your clients and help them make a difference in the world through charitable giving.

BECOME A MASTER FINANCIAL ADVISOR!

There is an emerging investment trend increasingly important to investors of all ages: strategic philanthropy. But few advisors deliver what clients want: integrating personal values with tax and financial plans.

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> Lesson plans and study plans
> Personal instructor support by email
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 - Online Research Library
> Practical case studies using professional software
> Calculators and tools you can use immediately
> Testing and certification
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Join thousands who have earned their credentials in the comfort and convenience of their own home or office, at their own pace. **Take a free trial and make a risk-free decision.**

"CAGP is excited about realizing a long-time dream to offer a designation to advisors who want to work more closely with charitably-minded clients to have community impact in mind when planning their finances, retirement and succession."

Ruth MacKenzie,
President and CEO, CAGP

FOR MORE DETAILS VISIT WWW.KNOWLEDGEBUREAU.COM OR CALL TOLL-FREE: 1-866-953-4769

DIFFERENTIATE YOURSELF WITH THE MFA-P™ DESIGNATION OFFERED EXCLUSIVELY BY KNOWLEDGE BUREAU!

THE MFA-P™ provides specialized professional credentials to enable high-value planning for individual and family legacies

> Learn to have highly satisfying conversation with clients sooner in your relationship

> Address their big fears: that gifts will not be used

> Plan for solutions that are tax-precise now and in the future

1

Introduction to Strategic Philanthropy

Learn how to tap into clients' philanthropic goals, and in the process increase opportunities to build trust by understanding clients' values and critical personal causes.

Then engage and get multiple stakeholders all on the same page, with broad principles and objectives in deploying a successful charitable giving strategy. Obtain a precise understanding of how to integrate the tax aspects of charitable giving.

In this course you will learn how to plan to integrate your clients values with new technical expertise about the assets your clients wish to deploy in their giving: from cash, to gifts-in-kind to deferred gifts made by bequests in the Will.

Six modules cover:

• Why Families Give
• The Role of the Advisor
• Personal Tax Aspects of Charitable Giving
• Ways to Give - Assets Other Than Cash
• Deferred Gifts - Tax Aspects
• What a Successful Plan Looks Like

2

Understanding the Charitable Sector

Obtain a deeper knowledge of emerging philanthropic and fundraising trends to guide clients' giving objectives towards the right investment options and charitable structures that ensure gifts will be used wisely and according to their wishes.

This course provides foundational knowledge for navigating and assessing the charitable landscape including non-profits, public and private foundations, and donor advised funds. Students will be equipped to provide guidance in evaluating giving options by mapping the charitable ecosystem together with client objectives for their social capital. Learn how to move gifting decision-making from year-end to annual planning and from one-time major gifting to an ongoing tax smart gift plan.

Six modules cover:

• The Charitable Sector Landscape• Emerging Philanthropic Trends
• How Charities Operate
•Funding of Canadian Charities
• Legal and Ethical Considerations
• Planning for Impact

3

Integrating Gifting with Client-Centric Planning

Obtain a deep, broad knowledge of how to apply gift planning vehicles to the objectives articulated by a variety of client profiles and to stay onside with ethical and legal considerations in doing so. Using true-to-life case studies, the student will learn to anticipate how to help clients maximize their gifts and make impactful gifts whilst minimizing the costs of giving.

In planning with various client profiles – singles, families, survivors, business owners, and vulnerable clients, the student will focus on three consistencies: Know Your Client, Know Your Charity and Know Your Investments to achieve client-centric goals in strategic giving. A particular focus will be the business owner profile.

7 case studies cover:

• Working with Vulnerable Clients
• Legacy Planning for Business Owners
• Using Flow-through shares to lower after-tax costs of charitable donations
• Use of life insurance to fund charitable objectives
• Use of CPP benefits to fund charitable objectives

IN PARTNERSHIP WITH: Knowledge Bureau, Canadian Association of Gift Planners (CAGP) and Spire Philanthropy.

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FREQUENTLY ASKED QUESTIONS ABOUT THE MFA-P™ DESIGNATION

For whom is the MFA-P™ program designed?

The MFA™-Philanthropy (MFA-P™) program is designed for advisors looking to incorporate charitable giving into their client conversations. This includes financial advisors, investment advisors, life insurance advisors, lawyers and accountants. It is also an important differentiator for advisors seeking propsective high-net worth clients. The MFA-P™ is also a valuable credential for those working in the charitable and non-profit sector.

Why should I enrol in the MFA-P™ program?

The MFA-P™ is designed to help advisors incorporate strategic charitable giving into their client conversations. There are many reasons to discuss philanthropy with your clients:

• Charitable giving is an important part of holistic financial planning, including estate planning.

• It is an opportunity to get to know your clients on a deeper level by understanding their values and an easy way to reach out to your clients' extended families including their children and grandchildren.

* You can help to structure charitable gifts in a simple but effective way and help your clients realize their philanthropic goals while maintaining the integrity of their investment, estate, and tax planning strategies.

* Advisors who connect family values and history as part of a long-term wealth management approach will be well-equipped to address increasing concerns clients have to make a difference in today's world of heightened social awareness.

* All professional advisors interviewed in a 2014 Canadian survey entitled The Philanthropic Conversation agreed that having incorporated philanthropy into their practice has strengthened and solidified their business. It is not only the right thing to do; it is unequivocally good for your clients and your practice.

Why choose the MFA-P™, in a nutshell?

> Provide unique and valuable service to your existing clients.

> Differentiate yourself in prospective for new high-net worth clients.

> A powerful tool to transition your service to the next generation of your clients' families.

What will the MFA-P™ program teach me to do?

The three online courses in the program focus on teaching advisors to develop plans with individuals and families looking to support their favourite charities in a strategic fashion, using a practical approach featuring real-life case studies and cutting edge calculators and a comprehensive online research library to stay up-to-date with tax changes.

I work at a charity. Is the MFA-P™ program for me?

The program will benefit those who work in the charitable and non-profit sector, as well as consultants and other individuals who support the sector. While designed for advisors, the MFA-P™ program will provide an understanding of charitable giving using a multi-stakeholder approach. The MFA-P™ designation will add credibility to those who cultivate relationships with both their clients and the professional advisors they work with.

How long will it take me to complete the MFA-P™ program?

Although the time will vary for each person, each course will take approximately 15-20 hours to complete for a total of 45-60 hours for the program. Taken online, study time is completely flexible to fit your busy schedule. Instructor support is available by email if needed. Take up to 9 months to complete the program. Group study sessions can be arranged.

Do I need to re-certify my MFA-P™ designation once I have received it?

Yes. Your license to use the MFA-P™ marks must be annually renewed to meet standards of conduct and continuing education requirements (15 hours each year). There are no membership fees.

For details on options for re-certification starting in 2020, please visit www.knowledgebureau.com

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- All course materials, custom-designed software tools, research library, quizzes, testing and personal support are included in the single fee
- No risk, money-back guarantee – take a free trial anytime
- Continuing education credits from most professional bodies and regulators

"I am looking forward to working with firms and advisors to engage in this important industry designation that will add further trust and credibility to the work of advisors, and impact on charities in Canada,"
- Brad Offman, CEO, Spire Philanthropy.

Be a Catalyst in Helping Businesses Grow

DIFFERENTIATE YOURSELF

Earn Your Designation as a
MFA™- Executive Business Growth Specialist

ESPECIALLY FOR:

- Business Owners
- Entrepreneurs
- Accounting and Tax Practitioners
- Business Consultants

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This is executive education especially designed for small to medium sized enterprises poised to grow in a new economy.

BECOME A MASTER FINANCIAL ADVISOR!

You too can help business leaders to create and implement strategies, processes and plans that develop and enable business growth. Or take advantage of this educational opportunity to scale up your own enterprise to its greatest potential.

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"I vow to continually get better. This topic is near and dear to me. If I know ... I can share."

- Paul J. Vaneyk
Executive Business Growth Specialist, Undergraduate

For more details visit www.knowledgebureau.com or call toll-free:1-866-953-4769

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EARN NEW CREDENTIALS AS A MFA™ - EXECUTIVE BUSINESS GROWTH SPECIALIST

Complete 5 online courses and attend the Business Builder Retreat.

Then offer a new service: help small business owners build their businesses to the next level.

This designation program is ideal for those who work small business clients. Learn how to nurture micro businesses with strategic planning and the operational foundations to engage both new employees and new clients, while you help owner-managers transform into powerful leaders.

The MFA™ - Executive Business Growth Specialist Designation is for:

- Professional who work with small business owners poised to grow. This program will help you have deeper conversations about the barriers to growth and to participate with them in strategic planning.
- Business builders set on a well-defined path but who would benefit from new business challenges, personal coaching and a vibrant business owner network.
- Energetic innovators with the desire to embrace change, reposition their firms and build new high-value, market-driven enterprises.
- Entrepreneurial employees who want to take the leap and lean into their dream of becoming an owner themselves.

Receive a license to use the exclusive methodology and materials taught in this trademarked program, valid for a year post-graduation. An update of skills is required thereafter, and students can attend the annual Business Builder Retreat or take an equivalent online program.

Memo from ... Evelyn Jacks, President of Knowledge Bureau

It gives me great pleasure to invite you to participate in this new program of studies from Knowledge Bureau. Become a catalyst for the growing ranks of business owners from coast-to-coast who strive to build solid enterprises poised for the future and solidly anchored to grow.

You'll learn online, at your own pace and on a schedule that complements your busy life. You'll also tap into opportunities for executive coaching and peer-to-peer networking with people just like you. Join us today and begin a new chapter in your business journey. In a world of work that increasingly includes the self-employed, it's your opportunity to participate in building a new economy.

STUDY ONLINE IN THE CONVENIENCE OF YOUR HOME OR OFFICE!

Every business owner wants to build a valuable, growth-oriented business. The MFA™-Executive Business Growth Specialist is on the cutting edge in helping others achieve their goals as entrepreneurs.

Any firm that has an attractive valuation transcends dependence on its founder. Businesses with strong positions in the marketplace - now and in the future - have strong foundations and deliberate strategies for growth in both income and equity. Learn the underlying skills needed.

1 Building Business Foundations:

STRATEGIC BUSINESS PLANNING: Planning for income, profit and long-term sustainable growth requires a strategic approach to business planning. Learn more about how to structure and plan for the financial results you need to grow a market-driven business someone will eventually buy.

OPERATIONAL FOUNDATIONS TO SUPPORT BUSINESS GROWTH: Business leaders recognize that client relationships are integral to long term success, but this can only be achieved with the support of the right management and operational environment. The focus of this course is on establishing and enhancing a company's operational framework.

2 Building Business Equity:

BUSINESS LAW and CONTRACT: Every company requires the interaction with legal talent to develop contracts with the various stakeholders it interacts with. This course provides the background information business owner need to understand basic contractual agreements and templates for engagements with customers, sub-contractors and employees.

MARKETING MASTERY FOR BUSINESS BUILDERS: The old ways of marketing no longer work and competition is fierce. This course focuses on the things that can be done immediately, without huge investment, to navigate these new marketing opportunities and make a market within a community with a compelling value proposition.

3 Building Business Leaders:

BUSINESS LEADERSHIP, CULTURE AND CONTINUITY: When a business grows beyond the work of a sole owner-manager, or a small shop of one to four people, it's important to build a team and a great team culture for getting results. That mean leadership methods and styles must change to the benefit of all the stakeholders to growth of the business.

BUSINESS BUILDERS RETREAT: Attend this retreat as a first or last step in the program and as a way to keep up your credentials. It can be lonely at the top, but business leaders have common issues. This retreat is a "must-do" in developing leadership styles and obtaining important business insights so you can help others grow with family or other employees.

"In today's ever changing business world, all businesses (large or small) need to continue to grow and scale up in order to keep pace with their clients' needs and retain top talent. Knowledge Bureau's Executive Business Builder Courses can help you achieve the success you are looking for. They provide a straightforward road-map to help leaders (and aspiring leaders) cover all the bases required to move their business forward"

-- Joanne Sigurdson, Author, Business Leadership, Culture and Continuity

Your study plan is flexible and self-paced. Assume 30 hours for each course. Take up to 3 months for one and 18 months for the designation.

TAKE A **RISK-FREE TRIAL**
knowledgebureau.com

CHOOSE KNOWLEDGE BUREAU: YOUR TRUSTED EDUCATION PARTNER.

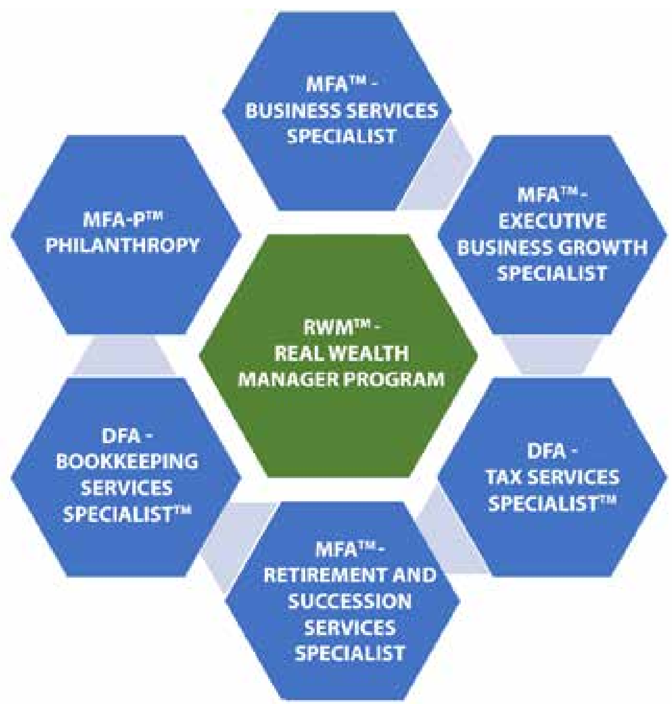
Apply a strategic approach to professional wealth management with all the specialists on your client's team.

Take the first steps now ...
Become an MFA-Executive Business Growth Specialist™
One of 7 designation programs from Knowledge Bureau

We would like to create a lasting learning relationship with you and your team, for all your professional development and continuing education requirements.

COUNT ON US FOR:

- Practical training you can use right away with your team and clients
- Unparalleled personalized attention to ensure your success in the program
- Flexible learning format to fit even the busiest schedules – conveniently online and available 24/7
- Tax deductible tuition fees which qualify for the Tuition Fee Credit on your tax return
- All course materials, custom-designed software tools, research library, quizzes, testing and personal support are included in the single fee
- No risk, money-back guarantee – take a free trial anytime
- Continuing education credits from most professional bodies and regulators



"The Business Builder Retreat provided me with the opportunity to reassess my role as the leader in our firm."

- Rosanna Sternat, DFA - Tax Services Specialist™, Manitoba

For Professionals in Tax and Financial Services: Add a Highly Prized Service to Your Practice

DIFFERENTIATE YOURSELF

Earn Your Designation as a MFA™- Retirement and Succession Services Specialist

ESPECIALLY FOR:

- Financial Planners
- Accounting and Tax Practitioners
- Wealth Managers
- Insurance Advisors
- Owner - Managers

FACULTY OF RETIREMENT PLANNING   Your Potential is Limitless™

Only with:

Knowledge Bureau®
World-Class Financial Education

Earn credentials to help people make great decisions about a worry-free retirement. Provide high value advice by custom-designing retirement savings and pension income plans.

BECOME A MASTER FINANCIAL ADVISOR!

Clients need professionals who can guide them to accumulate, grow, preserve and then withdraw tax-efficient retirement income throughout their lifetime and that of their survivors. Earn your **MFA™- Retirement and Succession Services Specialist Designation**.

TAKE A FREE TRIAL TODAY!

EVERYTHING IS INCLUDED:

> Personal course selection consultation and virtual campus orientation
> Lesson plans and study plans
> Personal instructor support by email
> Comprehensive Knowledge Journal
> EverGreen Explanatory Notes - Online Research Library
> Practical case studies using professional software
> Calculators and tools you can use immediately
> Testing and certification
> CE/CPD accreditation by various professionals

Knowledge Bureau is a widely respected education institute and publisher based in Canada. Our world-class education is innovative, informative, and in-depth, with an academic approach focused on knowledge, skill building and leadership.

Join thousands who have earned their credentials in the comfort and convenience of their own home or office, at their own pace. **Take a free trial and make a risk-free decision.**

"What surprised me about the courses was the outcome. My new understanding of the mechanics made it significantly easier for other advisors to implement my advice because I was confident I knew how to explain it."

Ian Wood, RWM™
MFA™-Retirement and Succession Services Specialist

For more details visit www.knowledgebureau.com or call toll-free:1-866-953-4769

DIFFERENTIATE YOURSELF WITH A NEW DIPLOMA!

Complete 3 courses to earn a diploma as a Certified Retirement Readiness Practitioner™

Do you have the skills to provide the process and structure your clients will need to effectively plan for their retirement? Enhance your credentials as a **Certified Retirement Readiness Practitioner™**. This diploma will allow you to differentiate yourself, attract new clients and increase profits by providing a high value service as a trusted advisor to your clients.

1

Debt and Cash Flow Management

This course is ideal for professionals in financial services looking to gain the skills needed to proactively help clients plan for and manage their financial health. The focus is on reporting on improvements in debt and savings over time to create a healthy balance sheet and facilitate responsible use of debt in building family wealth.

Knowledge Journal:

- **Overview: The Effect of Debt on Wealth Management**
- **Financial Assessment: Data Collection for Debt and Cash Flow Analysis**
- **Better Credit Scores: Prerequisites for Successful Borrowing**
- **Mortgages: A Better Mortgage Reduction Plan**
- **Managing Consumer Debt**
- **Vehicle Loans and Leasing**
- **Managing Fixed and Variable Expenditures**
- **Managing Debt Through Late Life Milestones**
- **Presenting Debt Reduction Solutions for Younger Families**
- **Business Debt**

2

Tax Strategies for Investors

This course covers a strategic and tax-efficient investment income planning process which places capital accumulations in the right hands of individuals in the family. The objective is to save capital and earn investment income with tax-efficiency and then to average down the tax paid on both by arranging to share with family members within the tax rules allowed. As important: planning to avoid tax erosion of the capital at transition times.

Knowledge Journal:

- **Introduction to Real Wealth Management**
- **Tax Efficient Investing: Planning for Income and Capital**
- **Business Income and Asset Planning**
- **Introduction to Canadian Income Tax**
- **Growing and Preserving Tax Efficient Wealth**
- **Registered Investments**
- **Tax-Efficient Investments Income**
- **Real Estate**
- **Tax-Efficient Asset Transfers**
- **Principal Residences**
- **Tax-Efficient Debt Management**
- **Risk Management: Tax Consequences of Disability and Death**

3

Fundamentals of Succession Planning

It is important for business owner-managers to rely on their financial professionals to initiate the succession planning process. But all other family stakeholders need to be involved too. Understand the importance of succession planning for the business and key positions within the business; succession plan implementation; addressing the impact of succession on employees and the business as a whole; and succession of the business to third parties. Use this important knowledge to address estate planning for non-business owner clients as well.

Knowledge Journal:

- **Introduction to Succession Planning**
- **Essentials of Planning and the Planning Process**
- **Key Positions that Require Succession Planning**
- **Role and Responsibility Issues for Business Leaders**
- **Financial Issues for Business Leaders**
- **Role and Responsibility Issues for Successors**
- **Financial Issues for Successors**
- **Succession Plan Implementation**
- **Succession of the Business to Another Organization**

"The MFA was able to deliver ... Increaing my confidence when consulting with advisors on how to help their clients meet their financial goals."

- Tony Bosch, MFA™ - Retirement and Succession Services Specialist

ADVANCE YOUR CAREER WITH A PROFESSIONAL DESIGNATION

To earn your designation, complete the diploma program plus complete these 3 courses (6 courses in total)!

All generations within families are having difficulty saving adequate money in this emerging high interest, high tax, high inflation environment. Earn your **MFA™ - Retirement and Succession Services Specialist designation** to to become the highly-qualified trusted specialist poised to provide the financial peace of mind they need.

4

Tax-Efficient Retirement Income Planning

This course allows advisors to develop a consistent process for multi-generational planning that looks at the tax-efficiency of both income and capital left for partners and beneficiaries.

Knowledge Journal:

- **Methodology: Tax-Efficient Retirement Income Planning**
- **First Steps: Helping Clients Envision the Plan**
- **Tax Changes Relating to Retirees**
- **Managing Government Income Sources**
- **Managing Canada Pension Plan**
- **Planning with Tax-Assisted, Self-Funded Sources**
- **Foreign Pensions and Non-Registered Accounts**
- **Tax-Efficient Retirement Income Planning for Employees - Part 1**
- **Tax-Efficient Retirement Income Planning for Employees - Part 2**
- **Planning for Post-Retirement**

5

Portfolio Risk Management in Retirement

Canadians are more likely than ever to live into their 90s, thanks to medical advancements and prioritizing healthy living. As a result, retirement income planning strategies must be applied over a much longer period of time. To address this, advisors need to understand how to focus on continued accumulation and investing, preservation of capital, as well as the tax-efficient withdrawal of funds. This course reviews the measurement and calculation of risk and return from this perspective.

Knowledge Journal:

- **Measuring and Calculating Returns**
- **Standard Deviation**
- **Correlation and Beta**
- **Calculating Portfolio Risk**
- **The Efficient Frontier**
- **The Capital Asset Pricing Model**
- **Generating Risk Adjusted Returns**
- **Indexing and the ETF Evolution**
- **Software Tools for Portfolio Analysis**
- **Portfolio Management in the Context of the Current Market**

6

Planning with Trusts

Trusts are used on an ever-increasing basis to plan for the wealth and succession objectives of medium and high-worth clients. The advisor with the ability to assist with that process creates the opportunity to establish a long-term, potentially intergenerational connection with a client and their family; provided their strategy considers recent tax changes in the planning process.

The Planning with Trusts course offered by Knowledge Bureau covers everything from basic trust mechanics to essential details on trusts for disabled beneficiaries.

Knowledge Journal:

- **Basic Trust Mechanics**
- **Trusts as Mechanisms to Exert Control**
- **Basic Tax Treatment**
- **Testamentary Trusts**
- **Inter Vivos Trusts**
- **Charitable Remainder Trusts**
- **Alter Ego and Joint Partner Trusts**
- **Insurance Trusts and RRSP Trusts**
- **Spendthrift Trusts**
- **Spousal Trusts**
- **Trusts for Disabled Beneficiaries**

Your study plan is flexible and self-paced. Assume 30 hours for each course.
Take up to 3 months for one, 9 months for the diploma program and 18 months for the designation.

TAKE A **RISK-FREE TRIAL**
knowledgebureau.com

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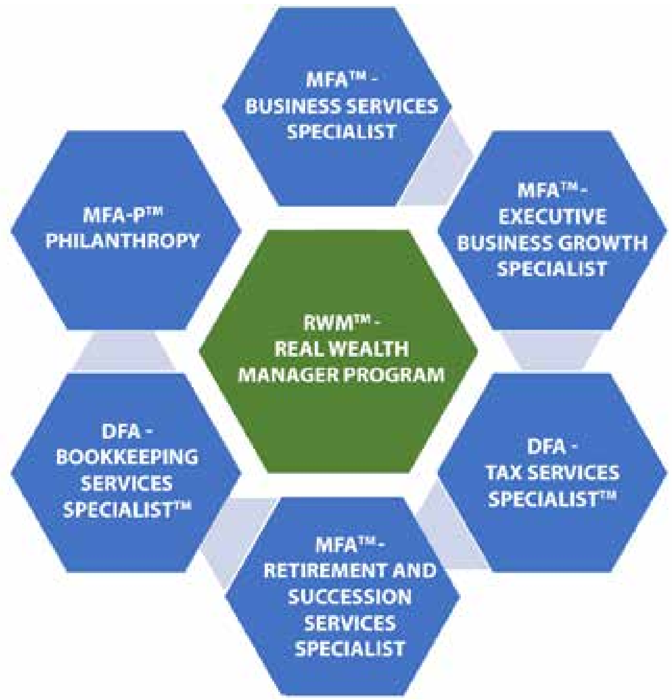
- No risk, money-back guarantee – take a free trial anytime
- Continuing education credits from most professional bodies and regulators



"My new MFA designation is a great talking point with clients and prospects. It shows that I am continuing to learn and grow as an advisor which ultimately adds to their confidence in the quality of advice they receive. I have found that the new designation also increases the frequency and quality of referrals. The MFA program is thorough, leading edge and fun. The combination of the written journal with the online tools is a great way to absorb and adopt more complex concepts and solutions."

- DOUGLAS V. NELSON, , B.Comm. (hons), CFP, CIM, MFA™, RWM™

Knowledge Bureau®

World-Class Financial Education

IN-CLASS ADD-ONS

CE Summits - Business Builder Retreat - Distinguished Advisor Conference

Knowledge Bureau is proud of its annual series of conferences and workshops that offer peer-to-peer learning options that enhance students' online self-study activities.

Select from a series of Knowledge Bureau Education Days: regional interactive CE Summits, held three times a year at a major city near you. Business leaders and owners: attend the Business Builder Retreat, and add-on the annual top-flight Distinguished Advisor Conference, held especially for our distinguished graduates, designates and anyone interested in building strategy based on the most current information in financial services.

The event delegates are thought leaders from across the financial services. They cover the latest strategic, technical and behavioral finance issues in personal, corporate and cross border tax filing, bookkeeping and accounting, investment, retirement, succession and trust and estate planning.

You too can join us to think more deeply about a holistic approach to family wealth management - as an advisor, a thought leader and a stellar and highly valued intermediary in providing solutions to clients. Everything is included in one low tuition fee. Get a tax receipt, too. You can even select an EZ-Pay tuition payment plan.

Register now and start today. Your friendly instructor is just an email away. Add on peer-to-peer, in-class or conference learning, too, for a full blended learning experience!

DESIGNED FOR ADVISORS IN PRACTICE

"I have been attending these workshops for 10+ years and always come away with new learning, great new ideas and renewed enthusiasm for adding value to my business."

- Maureen Carse,
DFA - Tax Services Specialist

CALENDAR OF EVENTS

TAKE ALL 3 AND SAVE MONEY!

KNOWLEDGE BUREAU EDUCATION DAYS

Come to the CE Summits and learn about recent tax and economic changes. Learn with peers and build your value proposition with a high-engaged, multi-disciplinary and experienced audience of professionals.

For agenda and speaker details, see knowledgebureau.com or call toll free 1-866-953-4769.

FALL 2019

Early Registration Ends October 15, 2019

Year-End Planning For Investors and Small Businesses

November 4	>	Winnipeg
November 5	>	Toronto
November 6	>	Calgary
November 7	>	Vancouver

WINTER 2020

Early Registration Ends January 10, 2020

Advanced Personal Tax Update

Canada's most comprehensive T1 "bootcamp"

January 16	>	Winnipeg
January 20	>	Toronto
January 21	>	Ottawa
January 22	>	Calgary
January 23	>	Edmonton
January 24	>	Vancouver

SPRING 2020

Early Registration Ends May 15, 2020

Post Budget Action Strategies For Tax and Financial Advisors

May 26	>	Winnipeg
May 27	>	Calgary
May 28	>	Vancouver
June 2	>	Toronto

WHAT'S INCLUDED:

- Cutting-edge instruction from industry experts
- Pre-reading in EverGreen Explanatory Notes
- The Knowledge Journal - a time-saving desktop reference
- Meet and greet networking lunch
- Tuition Value Program - $200 off your next online course
- Invitation to attend Society of RWM™ meetings

For more details visit www.knowledgebureau.com or call toll-free 1-866-953-4769

Knowledge Bureau®
World-Class Financial Education

THE BUSINESS BUILDER RETREAT 2019

November 9 to 10 - Puerto Vallarta, Mexico

REGISTRATION DEADLINE:
SEPTEMBER 15, 2019

SHARE STORIES AND EXPERIENCES, TOGETHER WITH GREAT PERSONAL AND PROFESSIONAL DEVELOPMENT!

Designed especially for entrepreneurial leaders, this very unique experience focuses on the special skills required to meet responsible challenges of business life in an era of great disruption, while at the same time striving for balance and good health as an individual. It is an educational event suitable for business leaders, owner-managers and executives in any industry.

BUSINESS BUILDER RETREAT:

The Business Builder Retreat is a full credit course in the MFA™-Executive Business Growth Specialist Designation Program.

Students in the program attend at no charge; others at retreat rates described on the reverse.

RETREAT DAY 1 - Join us for an evening of personal discovery over a healthy meal in an inspirational setting as we begin a 7-Step Journey.

Step 1: Share Your Story (see agenda for pre-work)

RETREAT DAY 2 - Experience six more steps in building a scalable business with a view to keeping a healthy life balance, hosted by your discussion catalyst and inspiring instructors. Sessions on health eating, breathing, stretching, aromatherapy, and mindfulness are interspersed.

Step 2: Renew Your Passion

Step 3: Enhance Your Leadership Potential

Step 4: Rethink Your Strategic Plan

Step 5: Create Your Safe Havens

Step 6: Manage Your Friend and Foe: Technology

Step 7: It's About People Power!

TAX DEDUCTIBLE TUITION FEES. 30 CE CREDITS. MEALS, AND ACTIVITIES INCLUDED

Experience Executive Education for Business Leaders Differently: Reserve Your Spot Today.

Register by September 15. Details on reverse.
For agenda, venue and speaker details see **www.knowledgebureau.com/conferences**.

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KNOWLEDGE BASE

Additional resources to build on your limitless potential

Knowledge Bureau Report

Whatever the topic, stay a step ahead of your competition with a thorough analysis of today's financial news—delivered weekly to your inbox or via social media. Knowledge Bureau Report is an important component of your studies with Knowledge Bureau to keep you up-to-date. All students are enrolled in this email service to ensure they have the latest breaking news as it happens from the CRA, Finance Department, and relevant news from Statistics Canada, the Bank of Canada and other influential news sources.

Knowledge Bureau Newsbooks

Written by some of Canada's most respected business authors, Knowledge Bureau newsbooks contain the latest information about such topics as taxes, retirement, and financial literacy.

Knowledge Bureau Calculators

Knowledge Bureau's powerful suite of calculators is your client relationship toolkit, designed to provide answers to all your clients' questions about tax efficiency.

Evergreen Explanatory Notes

Every tax professional needs this comprehensive reference library to answer client questions and access up-to-date information to assist in practice management.

Knowledge Bureau®

World-Class Financial Education

PARTNERSHIP OPPORTUNITIES

Become a partner for one of Knowledge Bureau's world-class education days

There are three opportunities for you to join us as participating sponsors of our workshops or conferences:

- CE Summits (CEs)
- Business Builder Retreat (BBR)
- Distinguished Advisor Conference (DAC)

Make a great decision to do education differently. Enjoy networking opportunities and gain national exposure for your brand or business.

KNOWLEDGE BUREAU EDUCATION DAYS

An In-Class Experience Especially for Practitioners in the Tax, Accounting and Financial Services Industries

A UNIQUE OPPORTUNITY TO SHOWCASE YOUR BRAND IN FRONT OF A HIGHLY QUALIFIED AUDIENCE

WE INVITE YOU ...

To become a leader and mentor as a strategic partner of the Knowledge Bureau Education Days - a great opportunity to build relationships with tax and financial advisors gathered to study the latest in tax, retirement, investment, estate and business planning.

Key Benefits:

- An engaged, qualified audience for your product/services.
- Your opportunity to participate in the program as part of the teaching faculty or as a networking leader.
- Complimentary attendance at this important Continuing Education event.
- You and your associates can earn valuable CE/CPD Credits.
- Preferred Rates and Group Study discounts for your COI.
- Recognition in Knowledge Bureau Report, distributed to over 16,000 advisors nationwide.
- Inclusion of your Company Logo and Profile in the printed Knowledge Journals and website.
- Cross-linking with www.knowledgebureau.com
- Great pre- and post-event follow-ups.

PLEASE JOIN US ...

As a strategic partner in **Knowledge Bureau's Education Days** for top advisors in the tax, bookkeeping, accounting and financial services.

Learn more at: **www.knowledgebureau.com**

PARTICIPATE IN A NATIONAL TOUR ...

- Ottawa
- Toronto
- Winnipeg
- Calgary

In January:

- Edmonton
- Ottawa

What Our Students Say

"Knowledge Bureau is by far the most comprehensive training program and resource support available."

\- Diane C., AB

"Great presenters. Love the program. (Still have the drive!) Love my workbook! Always!"

\- Lynda K., ON

"The info gained at the Knowledge Bureau workshops is unmatched."

\- Joey L., AB

"Applicable, valuable, an immediate opportunity to add value for clients. "

\- *L. Campbell, MB*

"All topics -- very informative."

\- Sato K., BC

"All updates very valuable, very professional. Wealth of knowledge with current clients will give me more referrals."

\- Eva F., AB

Join us in raising the bar in professional development for top advisors who provide real wealth solutions.

To register or find out more information: **www.knowledgebureau.com** or call toll-free **1-866-953-4769**

KNOWLEDGE BUREAU EDUCATION DAYS

Partnership Opportunities

SESSION LEADER PARTNERSHIP

Each City: $3,500 / Discounts for Multiple City Selections. Taxes extra.

- Exclusive instructional opportunity during selected session time slots.
- Announced recognition at start of event and throughout all breaks.
- Space to display promotional brochures and products at workshop.
- Marketing recognition in pre-event and at-event materials: print brochures, online (linked to your website), workshop-specific e-blasts and the Knowledge Bureau Report, marketing material in the take-home Knowledge Journal, extensive social media recognition, too.
- Receive two complimentary registrations per city.

NETWORKING LUNCH AND BREAK PARTNERSHIPS

Each city: $2,500. Taxes extra.

- Announced recognition at start of event and throughout all breaks.
- Space to display promotional brochures and products at workshop.
- Marketing recognition in pre-event and at-event materials: print brochures, online (linked to your website), workshop-specific e-blasts and the Knowledge Bureau Report, marketing material in the take-home Knowledge Journal, extensive social media recognition, too.
- Receive one complimentary registration per city.

MARKETING OPPORTUNITY - LEADERSHIP IN PRINT

Be a strategic partner of the comprehensive Knowledge Journal, taken home by participants - a valuable legacy reference that delegates refer to often.

Per Event:

Back Cover - $1,500
Inside Front Cover - $995
Inside Back Cover - $795

Taxes extra.

GROUP RATES

Bring several people from your office at special group rates for 2,3, or more.

Register 6 participants, company logo and name to be displayed on tables.

SAMPLE AGENDA

Topics Are Specific to Recent Tax, Economic and Budget Changes.

Join us in January, May and November.

8:00 - 8:30
REGISTRATION AND COFFEE

8:30 - 9:30
SESSION 1: Strategies for Individuals, Retirement and Estate Planning with Evelyn Jacks

9:30 - 10:30
SESSION 2: Current Issues in Personal, Corporate, Trust or Cross Border Tax **(session partnership)**

10:30 - 10:45
Networking Break and Sponsorship Fair

10:45 - 12:30
SESSION 3: Best Practices in Investment and Retirement Planning **(session partnership)**

12:30 - 1:00
MEET AND GREET NETWORKING LUNCH

1:00 - 1:30
SESSION 4: Round Table Discussion on Practice Management (session partnership)

1:30 - 2:45
SESSION 5: Family Wealth Planning

2:45 - 3:00
Networking Break and Sponsorship Fair

3:00 - 4:00
SESSION 6: Succession and Estate Planning

4:00 - 4:30
SESSION 7: Motivational Leadership and Business Building **(Session partnership)**

4:30
CLOSING REMARKS AND CERTIFICATION

Knowledge Bureau®

DISTINGUISHED ADVISOR CONFERENCE
THE CONFERENCE FOR LEADERS

THEME: POWERFUL COMPETITION - The Secret to Economic Resilience

An opportunity for advisors from around the globe to connect and consider multi-displinary issues

NOVEMBER 10 - 13, 2019 IN PUERTO VALLARTA

"A forum for advisors to learn, share, and evolve their businesses while experiencing relevant and timely content."

- Barbara Foy-Pilchner, National VP, Key Accounts, Manulife Investments

PARTNERSHIP PACKAGE

THE PROGRAM:

DAY 1 - SUNDAY, NOVEMBER 10

Registration, Newcomers Reception and Grand Opening Reception

DAY 2 - MONDAY, NOVEMBER 11

Theme: Economic Resilience in Creating Family Wealth

DAY 3 - TUESDAY, NOVEMBER 12

Theme: Client Relationship Management, Ethics and Compliance

DAY 4 - WEDNESDAY, NOVEMBER 13

Theme: New Opportunities in Wealth Distribution

Experience Education Differently and Be a Game Changer.

To apply and propose your educational topic, see reverse.
Send to: **registrar@knowledgebureau.com**.

Knowledge Bureau®

World-Class Financial Education

A MESSAGE FROM THE FOUNDER AND PRESIDENT

JOIN US FOR AN AMAZING OPPORTUNITY TO PARTNER IN A WORLD-CLASS FINANCIAL CONFERENCE.

Now in it's 16th year, the **Distinguished Advisor Conference** is the pre-eminent gathering of independent financial service providers!

THEME: POWERFUL COMPETITION - The Secret to Economic Resilience

WHEN AND WHERE?

DAC 2019 will be held November 10 - 13, 2019 at the Westin Hotel, in sunny Puerto Vallarta, Mexico.

WHO ATTENDS?

Leaders from the tax, financial and accounting sectors who aspire to higher education and new concepts. This diverse group is unique; they are ready to take the next step in building their practices and are looking for ideas, partners and products like yours that can take them to the next level.

WHY YOU SHOULD BE THERE.

This is an invaluable opportunity to meet professionals who want to hear about what you have to offer, through educational experiences as well as one-on-one opportunities, networking and trade show offerings.

WHY YOUR THOUGHT LEADERSHIP IS SO IMPORTANT.

It is clear that powerful competition is required against the backdrop of profound disruption: new tax and regulatory requirements, political and market turmoil, unprecedented levels of debt and the projected sluggish economic growth that appears to be coming thanks to demographic change.

This is your opportunity to actively participate in that change management - to inspire and share knowledge about your vision and unique value proposition to move things forward in a positive way in the best interests of the client.

Most important, it is your opportunity to showcase your firm to other leading professionals from across Canada, and increasingly, other parts of the world. The key differentiator: these independent and entrepreneurial professionals are not coming merely to accumulate CE/CPD Credits.

They are serious about investing their time and money in high level, continuing professional education focusing on the future growth of their practices. You will join a "who's who" of delegates and sponsors, and you'll be front and centre in influencing and inspiring them towards economic resilience!

For more details visit www.knowledgebureau.com
or call toll-free 1-866-953-4769

MEET HIGHLY-ENGAGED, INSPIRING ADVISORS POISED TO GROW THEIR PRACTICES AND THEIR CAREERS

A NEW OPPORTUNITY: THE DAC AUDIENCE IS UNIQUE AND SPECIALIZED

- A multi-disciplinary audience = new opportunities to present your message and be more referable across multiple industries.

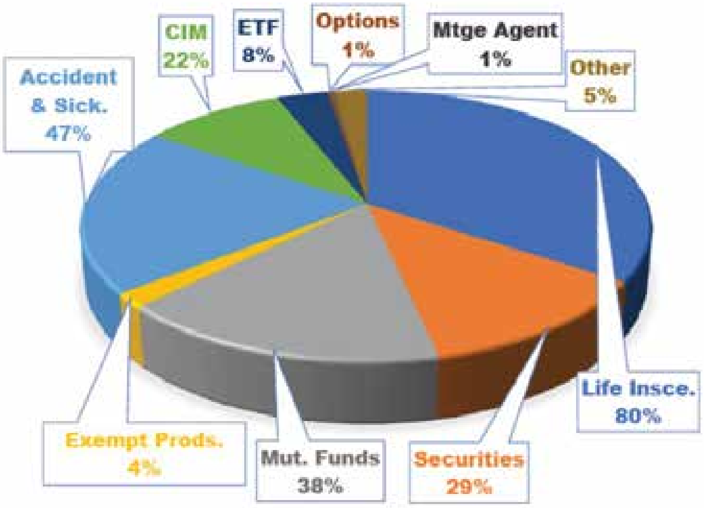
- Highly engaged advisors interested in your brand and value proposition.

- An educational format that positions you as a knowledge expert: this audience will want to learn from you and your message will resonate.

- Your investment has an “educational legacy”; that is, there are multiple ways your brand and message will appear in marketing activities over several months. We will include your profile in Knowledge Bureau Report, on the Knowledge Bureau website and through all our social media efforts. Our media partners will help, **too.**

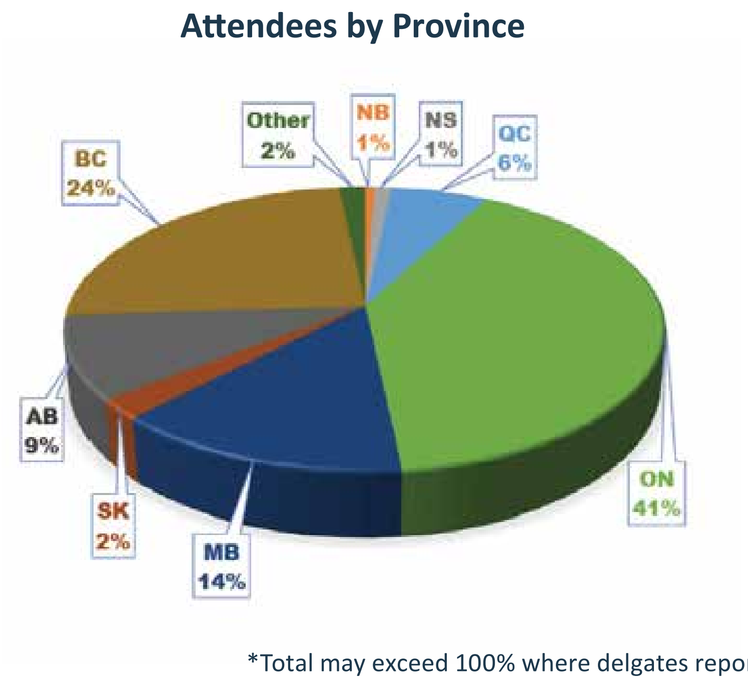
DELEGATE LICENSES HELD BY INDUSTRY

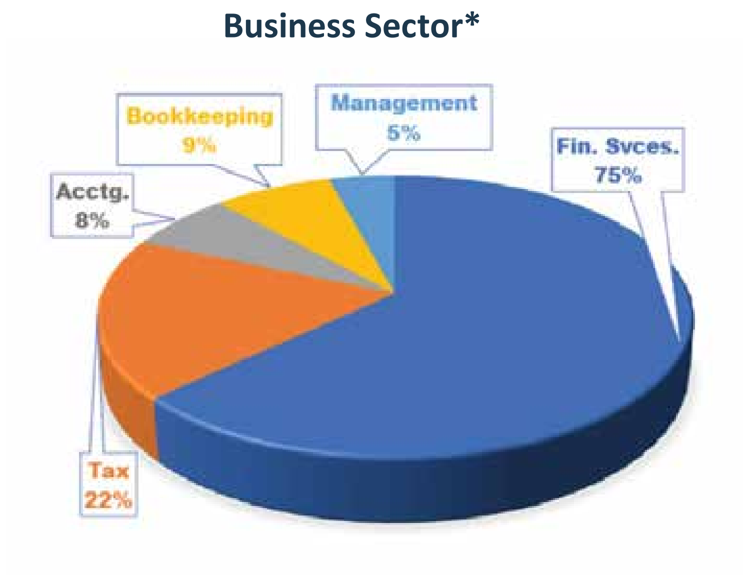
Licences Held*



*Total may exceed 100% where delgates report multiple Sectors, Licences or Designations.

DAC DELEGATE INFORMATION





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6 MORE GREAT REASONS TO COME TO DAC THIS YEAR!

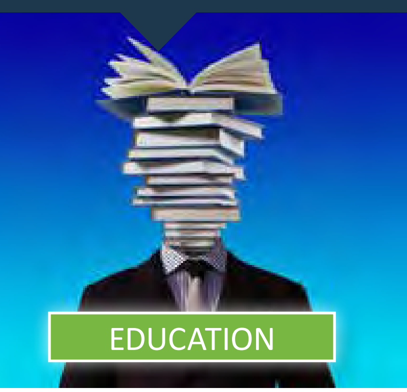
- Reach senior level decision makers in the tax, accounting, and financial services sector.
- Have access to C-level executives and business owners for 3 full days.
- Take part in Splash - one of our poolside meetings that allow you to meet targeted clients in an informal setting.
- Immerse your brand with a product information page in the journal, table top displays at breakfast and breaks, and by partaking in the networking opportunities, including dine-arounds and offsite activities.
- Utilize your registrations (depending upon sponsorship level) to inspire existing clients with sales initiatives to attend DAC.
- Make the most of your conference time with the DAC Partnership Handbook.

THEME - POWERFUL COMPETITION:
The Secret to Economic Resilience

DAC 2019 HIGHLIGHTS FOR PARTNERS

- 15 outstanding thought leaders on stage
- 2 vibrant lunch and learn sessions
- 5 incredible networking opportunities

COME TO THE DAC FOR THE ...



"Simply put, this was easily the best industry related conference that I have attended in my 17 years in the business. The speakers line-up was very strong, the content meaningful and ... it was thoroughly provoking and stimulating."

- Len M., Delegate

WE CAN **CUSTOMIZE** YOUR WHOLE **EXPERIENCE** JUST **FOR YOU** ...

Our oustanding event and education planning staff are onsite so that you can have so much more quality time!

Knowledge Bureau®
World-Class Financial Education

Corporate Upskill Solutions

Offer world-class financial education in your firm

Knowledge Bureau is your source for world-class customized financial learning. We're a national educational institution with the experience and expertise to tailor upskill solutions to the unique needs of your employees, associates, and professionals from all disciplines who work on financial solutions with clients.

We can help you, too, get great training results with consistently high standards.

Knowledge Bureau is the only educational institution in Canada with the experience and expertise to bring world-class financial education in multiple disciplines to your organization on a turn-key basis. We will customize instructional content to your unique needs while integrating your well-known brand into a prestigious national academic program.

Corporate Solutions

Work with Knowledge Bureau to deliver a resource-smart educational plan designed to lead your team to better results. Whatever the size of your employee group, sales force or advisor channel, we'll devise an accredited program that fits your continuing professional development needs, your budget and your schedule. Volume discounts are available.

Corporate Partner Experience

"Evelyn Jacks and her team of experts at the Knowledge Bureau have been a significant part of the success of Dynamic's award winning Snapshots program. Snapshots is an online resource centre helping advisors provide customized and personalized advice and resources to clients at various life changing events. Evelyn and her team provided valuable in depth advisor education courses on a variety of the life events covered including Leaving a Job, Ailing Parent, Home Ownership and Disability. Their continuing education accredited courses have been taken by thousands of advisors across Canada who are interested in strengthening their relationships with clients by offering holistic advice as their clients' lives change."

—Yasminka Marcus | Senior Manager | Education, Wholesale & Advisory, Dynamic Funds

Your Potential is Limitless™

Your Registration Form - Online Studies

Anytime, Anywhere Learning

Round the clock access wherever you are in the world.

Explore Your Pathway to Success

FACULTY OF MANAGEMENT	FACULTY OF PERSONAL AND CORPORATE TAXATION	FACULTY OF RETIREMENT PLANNING
FACULTY OF BUSINESS ACCOUNTING	FACULTY OF STRATEGIC GIFT PLANNING	CERTIFICATE AND DIPLOMA OPTIONS

Online registration at: www.knowledgebureau.com or by email (below)

Contact Us

Toll Free: 1-866-953-4769
Email: registrar@knowledgebureau.com

Knowledge Bureau®
World-Class Financial Education

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World-Class Financial Education

REGISTRATION FORM - ONLINE STUDIES

registrar@knowledgebureau.com
TOLL FREE: 1.866.953.4769

ONLINE 24/7

IDENTIFICATION

Name (first/last): ____________________ **Prior Student ID#:** __________

Current Designations: ____________________ **Company:** ____________________

Address: ____________________ **City:** ____________________ **Province:** __________

Postal Code: ____________________ **Email:** ____________________

Home Phone: (____) __________ **Cell Phone:** (____) __________ **Work Phone:** (____) __________

Referred by: ____________________ **Promo Code:** ____________________

CHOOSE PROGRAMMING

To specialize select 4 courses in your preferred discipline plus two others from any program.

FACULTY OF PERSONAL/CORPORATE TAXATION

☐ **DFA - Tax Services Specialist™**
- ☐ Income Tax Filing Fundamentals
- ☐ Personal Tax Filing and Planning
- ☐ Advanced Tax Filing and Planning
- ☐ Tax Accounting for Proprietorships
- ☐ Tax Accounting on Death of a Taxpayer
- ☐ Fundamentals of Filing Trust Returns

☐ **MFA™ - Business Services Specialist**
- ☐ Advising Family Businesses
- ☐ Corporate Income Tax Fundamentals
- ☐ Tax Planning for Incorporated Professionals
- ☐ Tax Planning for Corporate Owner/Managers
- ☐ Business Valuation for Advisors
- ☐ Cross Border Taxation

* or choose any one course in any program

FACULTY OF BUSINESS ACCOUNTING

☐ **DFA - Bookkeeping Services Specialist™**
- ☐ Bookkeeping for Small Businesses
- ☐ Advanced Payroll for Small Business
- ☐ Debt and Cash Flow Management
- ☐ Managerial Accounting and Budgeting
- ☐ Accounting for Multiple Business Profiles
- ☐ Accounting for Business Growth and Transition

FACULTY OF RETIREMENT PLANNING

☐ **MFA™ - Retirement and Succession Services Specialist**
- ☐ Debt and Cash Flow Management
- ☐ Tax Strategies for Investors
- ☐ Fundamentals of Succession Planning
- ☐ Tax-Efficient Retirement Income Planning
- ☐ Portfolio Risk Management in Retirement
- ☐ Planning with Trusts

FACULTY OF MANAGEMENT

☐ **RWM™ - Real Wealth Manager Program**
The Pre-Eminent Standard in Wealth Management Services

☐ **MFA™ - Executive Business Growth Specialist**
- ☐ Business Leadership, Culture and Continuity
- ☐ Strategic Business Planning
- ☐ Operational Foundations to Support Business Growth
- ☐ Business Law & Contracts
- ☐ Marketing Mastery for Business Builders
- ☐ Business Builder Retreat *

FACULTY OF STRATEGIC GIFT PLANNING

☐ **MFA-P™ - Philanthropy Services Specialist**
- ☐ Introduction to Strategic Philanthropy
- ☐ Understanding the Charitable Sector
- ☐ Integrating Gifting with Client-Centric Planning

TUITION and STUDY PLAN

All Designates receive lowest per course tuition rates

EZ-PAY PLAN ($39/course instalment fee)

Act by July 31	Study Period:	Regular Tuition Rates:	Multiple Course Discount:	Savings:	Cost Per Course:	First Payment	Monthly Instalments
TECHNICAL SKILLS MASTERY:							
☐ **DESIGNATION** 6 courses	18 months	$4,770	$3,990	16%	$665	1 x $290	14 x $281
☐ **DIPLOMA** 3 courses	9 months	$2,385	$2,085	12%	$695	1 x $277	7 x $275
☐ **CERTIFICATE** 2 courses	6 months	$1,590	$1,390	12%	$695	1 x $296	4 x $293
☐ **CERTIFICATE** 1 course (ALUMNI)	3 months	$795	$745	6%	$745	1 x $264	2 x $260
☐ **CERTIFICATE** 1 course (NEW STUDENT)	3 months	$795	N/A	N/A	$795	1 x $278	2 x $278
BUSINESS SKILLS MASTERY:							
☐ MFA™- Executive Business Growth	18 months	$4,770	$3,990	16%	$665	1 x $290	14 x $281
☐ MFA-P™- Philanthropy Program	9 months	$995	N/A	N/A		1 x $371	3 x $221
☐ RWM™- Real Wealth Manager Program	9 months	$995	N/A	N/A		1 x $371	3 x $221

PAYMENT OPTIONS:

☐ **FULL PAYMENT** $ __________

☐ **EZ-PAY PLAN** (1st payment only now, see above) $ __________

☐ **Study with a buddy - save 10%** $ __________

SUBTOTAL $ __________

☐ **HARD COPY Textbook $125 per course** __________

GST/HST (885004713RT001) $ __________

TOTAL DUE NOW: $ __________

PAYMENT METHOD:

☐ **Credit Card** ☐ **Visa** ☐ **MasterCard** ☐ **E-Transfer**
Available in July
See "Learn Your Way" page for details

Card Number: ____________________

Expiry Date: _____ / _____ **Amount:** $ __________

Name on Card: ____________________

Signature: ____________________

For Curriculum, Academic and Refund Policies, and Procedures and Technology Specs go to: https://www.knowledgebureau.com/site/faq

☐ **I agree to receive course updates, scheduling, communications, certification and transcripts from Knowledge Bureau.**

Knowledge Bureau®

KNOWLEDGE BUREAU EDUCATION DAYS

REGISTRATION FORM

HOW TO REGISTER: Online: knowledgebureau.com | **Toll-Free:** 1-866-953-4769 Fax: 1-204-953-4762 | **Scan/Email:** reception@knowledgebureau.com

Each Knowledge Bureau Education Day: 10 CE/CPD credits (includes in-class and pre-reading work)

MAKE YOUR SELECTIONS:

FOR DETAILED AGENDA SEE: www.knowledgebureau.com	SELECT LOCATION:
☐ **FALL 2019** Year-End Planning: For Investors and Small Businesses **Early registration deadline: October 15, 2019***	☐ November 4 > Winnipeg ☐ November 5 > Toronto ☐ November 6 > Calgary ☐ November 7 > Vancouver
☐ **WINTER 2020** Advanced Personal Tax Update **Early registration deadline: January 10, 2020***	☐ January 16 > Winnipeg ☐ January 20 > Toronto ☐ January 21 > Ottawa ☐ January 22 > Calgary ☐ January 23 > Edmonton ☐ January 24 > Vancouver
☐ **SPRING 2020** Post Budget Action Strategies for Tax and Financial Advisors **Early registration deadline: May 15, 2020***	☐ May 26 > Winnipeg ☐ May 27 > Calgary ☐ May 28 > Vancouver ☐ June 2 > Toronto

REGISTRATION FEES (Taxes Extra):

Multiple Attendance Rates	Single Attendance Rates Enrol by Early Registration
☐ **Trio - Take All Three or Bring Three to One** **Save the Most!** **$1,185** **($395 each - taxes extra)**	**Designate** ☐ $395 each **Early Registrant** ☐ $495 each
☐ **Duo - Take Two or Bring Two to One** **$990** ($495 each - taxes extra)	**Regular Registration** (after deadlines) ☐ $695 each **Group of 4 or More** ☐ $350 per person (attach list of delegates)

***PLEASE REGISTER BY THE DEADLINES TO RECEIVE THE HARD COPY OF THE KNOWLEDGE JOURNAL AT NO EXTRA COST. REGULAR COST IS $395.**

SIGN ME UP!

Please include your name as you want it to appear on your certificate.

Returning Client ID / Student Number: ______

Referred by: ______

Name: ______ Designations/Licenses: ______

Company: ______

Address: ______ City: ______ Province: ______ Postal Code: ______

Email: ______

Phone - Work: ______ Mobile: ______ Twitter: ______

Are you mainly involved in: ☐ **Taxation and Accounting Services** ☐ **Bookkeeping Services** ☐ **Financial Services**

SOCIETY OF RWM™ MEETINGS:
Join a network of Real Wealth Managers™: professionals who practice using a holistic, multi-disciplinary approach to solving clients' specialized issues. Discuss relevant case studies and earn CE credits, too. If you are a graduate of the RWM™, MFA™, or DFA-Specialist programs, please indicate your interest in attending these complimentary break-out sessions at the spring and fall CE Summits. RSVP is required.

☐ **Yes, I'd like to RSVP and check it out! City:** ______

PAYMENT METHODS (for instalment plan options call: 1-866-953-4769)

☐	Designate	1 x $395
☐	Early Registrant	1 x $495
☐	Trio (take 3 or bring 3 to 1)	1 x $1,185
☐	Duo (take 2 or bring two to 1)	1 x $990
☐	Regular Registration	1 x $695
☐	Group rate (4 or more)	$350 each

TOTAL FEES: $ ______

Total Fees: $ ______ Plus GST/HST $ ______ Total Tuition $ ______

Payment Information: Credit Card Type ☐ Visa ☐ MC ☐ E=Transfer (available in July)

Card Number: ______ Expiry Date: ______

Name on Card: ______

Signature: ______

Note: $45 fee for credit card declines.

☐ I agree to receive content updates, information about educational summits and transcripts on my progress as a student with Knowledge Bureau.

For Curriculum, Academic and Refund Policies, and Procedures and Technology specs go to: www.knowledgebureau.com/index.php/about-us/knowledge-bureau-policies/

THE BUSINESS BUILDER RETREAT 2019 - Registration Form

SIGN ME UP!

Name (first/last): ______________________ **Student ID#:** ______________

Current Designations: ______________________ **Company:** ______________________

Address: ______________________ **City:** ______________ **Province:** __________

Postal Code: ______________ **Email:** ______________________

Home Phone: (   ) ______________ **Cell Phone:** (   ) ______________ **Work Phone:** (   ) ______________

Referred by: ______________________ **Promo Code:** ______________________

REGISTRATION FEES

	BUSINESS BUILDER RETREAT in PUERTO VALLARTA.	Note: all tuition, accreditation and meals included.
❑	Students enrolled in the in the MFA™-Executive Business Growth Specialist Program	No additional charge
❑	Retreat Attendees Only	$695.00 plus taxes
❑	Distinguished Advisor Conference Attendees	$595.00 plus taxes
❑	Business Builder Retreat Spousal Program	$595.00 plus taxes

Group Registrations: Enquire about a 10% reduction on tuition for multiple enrolments from your group.

What's Included: For Business Builder Retreat, tuition fees include accreditation and certification for approximately 30 CE/CPD credit hours (10 in class and 20 pre-retreat prep work), PowerPoints (please bring your own laptop, tablet or phone for electronic viewing) and opening night dinner, as well as breakfast and lunch on Day 2.

PAYMENT OPTIONS:

Tuition Fees: ❑ VISA ❑ MasterCard ❑ E-Transfer (available in July)

Card Number: ______________________

Expiry: ______________________

Signature: ______________________

❑ **Tuition Paid in Full** ❑ Self $ ________ ❑ Spouse $ ________

Taxes $ ______________ **Total $** ______________

(GST # 885004713RT00001)

HOTEL ARRANGEMENTS

See Conferences at: **www.knowledgebureau.com**

Hotel Arrival: ______________________

Hotel Departure: ______________________

Number of guests: ______________________

❑ King ❑ Queen (bed size not guaranteed)

❑ Allergies?

Will try our best to accommodate - not guaranteed.

HOW TO REGISTER

REGISTER ONLINE and see full agenda, speakers, topics and bios, activities, and policies/procedures at: www.knowledgebureau.com/site/conference/bbr

Phone: 1-866-953-4769 (toll free)

Fax: 1-204-953-4762

Email: registrar@knowledgebureau.com

❑ **YES, PLEASE UPDATE ME** on conference, agenda and venue details and registration updates, CE/CPD transcripts and certificates, through Knowledge Bureau Report, by phone, mail or email.

YOUR STATUS

❑ Delegate ❑ Delegate-Spouse ❑ Sponsor ❑ Potential Sponsor ❑ KB Student

❑ Delegate-Designate ❑ Speaker ❑ Speaker-Sponsor ❑ Event Planner ❑ Staff

Knowledge Bureau®
World-Class Financial Education

16TH ANNUAL DISTINGUISHED ADVISOR CONFERENCE REGISTRATION FORM
November 10 - 13, 2019 in Puerto Vallarta

SIGN ME UP!

Referred by ______________________ ❑ In-Conference Repeat Client

Please include your name as you want it to appear on the name tag badge.

Preferred Client ID/Student Number ______________________

Name ______________________

Designations/Licenses ______________________

Company Name ______________________

Address ______________________

City, Province ______________________ Postal Code ______________________

Email ______________________

Phone (primary) ______________________ Phone (cell) ______________________

Years in business ____________ ❑ Financial Services ❑ Tax Specialist ❑ Accounting ❑ Other ____________

Spouse's name ______________________ Occupation ______________________

Industry ______________________ Designations ______________________

Dietary Restrictions: ❑ For You ______________________ ❑ For Spouse ______________________

REGISTRATION FEES: Regular Tuition Fee is $2,500 - Save Money With Early-Bird Fees Below

	REGISTRATION	Spousal Fees
❑	$2,095 until September 15	❑ $595
❑	$1,995 eacb for multiple enrolments (2 or more delegates - save $100 each)	❑ $595

INSTALMENT PLAN - PLEASE CALL US TO ARRANGE YOURS (ONLY $95 EXTRA)

WHAT'S INCLUDED:

For full details see agenda, registration, policies and procedures at www.knowledgebureau.com

Registration Includes: approximately 15 CE/CPD Credit hours, journal, accreditation, certification, opening reception, breakfasts, mimosa breaks, group gala dinner. Visit agenda often as speakers and topics are added. Note: newcomers - please join us at your special reception.

Graduate Ceremony: RWM™, MFA™ and DFA-Specialist™ students and grads are invited to this celebration.

Spousal Fees: Spouses may attend all sessions and events, but do not receive CE credits or certification.

PAYMENT OPTIONS:

Tuition Fees: ❑ VISA ❑ MasterCard ❑ E-Transfer See "Learn Your Way" page for details

Card Number: ______________________

Expiry: ______________________

Signature: ______________________

❑ **Tuition Paid in Full** ❑ Self $ ________ ❑ Spouse $________

Taxes $ ______________ **Total $** ______________

(GST # 885004713RT00001)

HOTEL ARRANGEMENTS:

Cost - $149.50 U.S. per night; Taxes, 2% foreign exchange are extra. Payment Charged September 15.

Hotel Arrival: ______________________

Hotel Departure: ______________________

Number of guests: ______________________

❑ King ❑ Queen (bed size not guaranteed)

HOW TO REGISTER

Phone: 1-866-953-4769 (toll free)

Fax: 1-204-953-4762

Online: knowledgebureau.com/site/conference/dac2019

Email: registrar@knowledgebureau.com

❑ Yes, please update me on conference, agenda and venue details, and registration updates, CE/CPD transcripts and certificates, through Knowledge Bureau Report, by phone, mail, or email.

YOUR STATUS

❑ Delegate	❑ Delegate-Spouse	❑ Sponsor	❑ Potential Sponsor	❑ KB Student
❑ Delegate-Designate	❑ Speaker	❑ Speaker-Sponsor	❑ Event Planner	❑ Staff

CE SUMMITS

PARTNERSHIP PLEDGE FORM

Knowledge Bureau® World-Class Financial Education

Confirm your participation as a strategic partner of these regional Knowledge Bureau Education Days: the CE SUMMITS, complete the information below and return to Knowledge Bureau by fax (204-953-4762) or email (registrar@knowledgebureau.com). Amounts are payable 60 days before each event. If you have any questions, please contact us at: **1-866-953-4769** or visit us online at: **knowledgebureau.com**.

Company: ______________________________

Contact Name: ______________________ Title: ______________________

Company Address: ______________ City/Province: __________ Postal Code: __________

Company Phone: ______________________ Fax: ______________________

Business Email: ______________________________

SELECT YOUR STRATEGIC PARTNERSHIP LEVELS HERE:

SELECT A CATEGORY:	SELECT A FEE:	FALL 2019	WINTER 2020	SPRING 2020	All Cities
☐ **SESSION LEADER PARTNERSHIP** Receive 2 complimentary registrations per city ($1190 value)	☐ $3,500 per city	☐ Winnipeg ☐ Toronto ☐ Calgary ☐ Vancouver	☐ Winnipeg ☐ Toronto ☐ Ottawa ☐ Calgary ☐ Edmonton ☐ Vancouver	☐ Winnipeg ☐ Calgary ☐ Vancouver ☐ Toronto	☐ **All Cities** One Tour SAVE 5% ☐ **All Cities** Two Tours SAVE 10% ☐ **All Cities** Three Tours SAVE 15%
HOST A NETWORKING BREAK/LUNCH ☐ Morning Break ☐ Lunch ☐ Afternoon Break Receive 1 complimentary registration per city	☐ $2,500 per city	☐ Winnipeg ☐ Toronto ☐ Calgary ☐ Vancouver	☐ Winnipeg ☐ Toronto ☐ Ottawa ☐ Calgary ☐ Edmonton ☐ Vancouver	☐ Winnipeg ☐ Calgary ☐ Vancouver ☐ Toronto	

SELECT A CATEGORY:	SELECT A FEE:	FALL 2019	WINTER 2020	SPRING 2020
LEADERSHIP IN PRINT ☐ Back Cover ☐ Inside Front Cover ☐ Inside Back Cover	☐ $1,500 per tour ☐ $995 per tour ☐ $795 per tour	☐ Fall 2019	☐ Winter 2020	☐ Spring 2020
HOST A GROUP OF SIX OR THREE UNDER YOUR COMPANY BANNER. Register 2 or more people for a special group rate.	**Duo (register 2)** ☐ **$495 each plus tax** **Trio (register 3)** ☐ **$395 each plus tax** **More than 3** ☐ **$350 each plus tax**	☐ Winnipeg ☐ Toronto ☐ Calgary ☐ Vancouver	☐ Winnipeg ☐ Toronto ☐ Ottawa ☐ Calgary ☐ Edmonton ☐ Vancouver	☐ Winnipeg ☐ Calgary ☐ Vancouver ☐ Toronto

PAYMENT:

Your strategic partner commitment is not secured until payment is received. Session leaders must confirm 4 months in advance of each session.

☐ Purchase Order attached; please invoice us, or ☐ Pay by Credit Card: ☐ VISA ☐ MC ☐ E-Transfer (see Learn Your Way for details)

Card Number: ______________________ Expiry Date: __________

Name of Card Holder: ______________________________

Date: __________ Total Amount: ______________ *GST extra - GST Number 885004713RT0001

Signature: ______________________________

SCAN AND EMAIL TO: REGISTRAR@KNOWLEDGEBUREAU.COM OR FAX FORM TO 204-953-4762

Knowledge Bureau®
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JOIN US AT THE 16th ANNUAL DISTINGUISHED ADVISOR CONFERENCE

Theme: Powerful Competition - The Secret to Economic Resilience

This is a diverse audience of influential and successful advisors from all sides of financial services, including leaders in the wealth, insurance and tax advisory businesses. **We are pleased to offer 5 levels of participation in 2019:**

	Title	Platinum	Gold	Silver	**Bronze**
LEVELS (taxes extra)**:**	**$29,500** (1 available)	**$9,500** (1 available)	**$7,500** (10 available)	**$5,500** (4 available)	**$1,500**
Title sponsor: Gala Reception Co-Host	X				
Lunch and Learn Product Presentation	X	X			
On Stage Presentation	X	X	X		
Marketing on website, weekly E-News, social media, banners, journals, signs, etc.	X	X	X	X	X
Onsite trade show table and ad in printed Knowledge Journal	X	X	X	X	X
Newcomer's Reception **or** Graduate Reception **or** Mimosa Break Sponsor **or** Breakfast Sponsor				X	
FREE REGISTRATIONS	4	3	2	1	

MAKE A GREAT DECISION TO DO EDUCATION DIFFERENTLY

- A multi-disciplinary audience = new opportunities to present your message and be more referable across multiple industries.
- Highly engaged advisors interested in your brand and value proposition.
- An educational format that positions you as a knowledge expert: this audience will want to learn from you and your message will resonate.
- Your investment has an "educational legacy"; that is, there are multiple ways your brand and message will appear in marketing activities over several months. We will include your profile in Knowledge Bureau Report, on the Knowledge Bureau website and through all our social media efforts. Our media partners will help, too.

❑ YES! We would like to partner with Knowledge Bureau at DAC 2019! Please indicate level (check):

LEVELS:	**Title**	**Platinum**	**Gold**	**Silver**	**Bronze**
(taxes extra)	❑ **$29,500**	❑ **$9,500**	❑ **$7,500**	❑ **$5,500**	❑ **$1,500**

INVOICE TO:	
COMPANY NAME:	
FIRST NAME:	**LAST NAME:**
PHONE NUMBER:	**EMAIL:**

For more information call toll-free 1-866-953-4769

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FREE TRIALS

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Fill knowledge gaps and learn new competencies.
Your academic path to mastery in tax and financial services.

KNOWLEDGE BUREAU REPORT

Canada's leading news feed for tax and financial trends.
A vital component of your ongoing education.

EVERGREEN EXPLANATORY NOTES

Your real-time tax research library provides authoritative,
current online answers to your questions.

KNOWLEDGE BUREAU CALCULATORS

Your immediately implementable client relationship toolkit.
Provide answers to client questions with tax-efficiency.

DISCOVER CE SUMMITS

Learn in class three times a year from experts in the tax and
financial services. Valuable networking, too.

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Take a trial in these easy steps by going to **www.knowledgebureau.com** and

1. Choose Free Trials tab
2. Select the Course You Want to Take
3. Tell Us Who You Are
4. Take the Free Trial
5. Register and receive a tuition credit as a special thank you giving Knowledge Bureau education a try

Knowledge Bureau®
World-Class Financial Education

ABOUT KNOWLEDGE BUREAU

Who We Are. Knowledge Bureau is a widely respected education institute and publisher based in Canada. Our world-class education is innovative, informative, and in-depth, with an academic approach focused on knowledge, skill building, and leadership.

Founded in 2003 by bestselling author and internationally acclaimed financial educator Evelyn Jacks, Knowledge Bureau is a regular contributor to commentary on national media, providing commentary on federal and provincial regulation, specifically as it relates to tax and economic policy and global wealth management.

Our Instructors.

We recruit great advisors who are passionate about sharing knowledge with an inter-advisory audience. They come from the tax accounting, financial and legal advisory industries. We also recruit innovative people to make our outstanding online educational experience world class, supported by student relationship managers dedicated to the successful graduation of our very busy professional students.

Live Content.

CE Summits are held regularly in major cities across Canada. DAC and the Business Builder Retreat is held annually to provide a peer-to-peer learning environment that embellishes on the online self-study opportunity. They are led by thought leaders who have leading practices or distinguished reputations in the areas of tax accounting, investment and financial services, legal and estate planning services and behavioral finance. This cross-cultural environment results in unique networking and referral opportunities, in addition to the deeper knowledge gained from a holistic approach to tax efficient financial planning.

Online Curriculum.

Knowledge Bureau publishes twenty-four online certificate courses leading to occupational skills diplomas and two designations offering five areas of specialization: the MFA™ (Master Financial Advisor) designation, which signifies specialization in philanthropy, retirement, business succession and estate planning in wealth advisory practices and the DFA (Distinguished Financial Advisor) Tax Services Specialist™ and DFA Bookkeeping Services Specialist™ designations providing technical skills for professionals in the tax, bookkeeping and accounting services.

In addition Knowledge Bureau offers two business specialization courses: MFA ™ Executive Business Growth Specialist and the RWM ™ (Real Wealth Manager) that rounds out the curriculum.

News Services.

Knowledge Bureau Report, is published weekly to your favourite device and distributed broadly by email, social media and print. Knowledge Bureau is active in television and radio broadcast, reaching millions to interpret headlines that affects the advisor-client relationship.

Please Sign Me Up:

- ☐ Knowledge Bureau Report Free Subscription
- ☐ Online Certificate Course Free Trial
- ☐ Knowledge Bureau EverGreen Explanatory Notes Free Trial
- ☐ Knowledge Bureau Calculators Free Trial

NAME ______________________________

COMPANY ______________________ INDUSTRY ______________________

PHONE NUMBER ______________________________

EMAIL ADDRESS ______________________________

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GOOD NEWS ... We've done the research for you. We also have 15 professional online calculators for you.

EverGreen Explanatory Notes

Continually updated through our "Evergreening" process - when we get the news, you get the news!

With over 800 topics with thousands of links to the Income Tax Act, CRA forms, publications, information circulars and interpretation bulletins. Featuring easy-to-understand definitions, tax facts, examples, tips and traps and interview checklists - questions to ask your clients. **All just a couple of mouse clicks away!**

"The research material available in EverGreen is outstanding and very comprehensive. I've never seen anything like it."
-- Anthony M., BC

Try EverGreen Demo today at:
www.knowledgebureau.com/index.php/tools-resources/evergreen

Knowledge Bureau Calculators

Income Tax Estimator
Financial Assessment Calculator
Take Home Pay Calculator
RRSP Savings Calculator
Registered vs Non-Registered Savings Calculator
Investment Income Calculator
Tax Efficient Retirement Income Calculator
Marginal Tax Rate Calculator
Fixed vs Variable Income Calculator
CPP Income Calculator
Debt Reduction Solutions Calculator
Cash Flow Calculator
Tax Efficient Assets Transfer Calculator
Donations Savings Calculator
Trust Tax Estimator

To Start Your Trial Period, Visit:
www.knowledgebureau.com/index.php/tools-resources/calculators

1-866-953-4769 | www.knowledgebureau.com | Winnipeg, Manitoba

Knowledge Bureau®
World-Class Financial Education

Evergreen Explanatory Notes
Knowledge Bureau Calculators

Toll free: 1-866-953-4769 | Email: registrar@knowledgebureau.com

IDENTIFICATION: (new or returning clients please provide student ID)

Name ______________________________

Company ______________________________

Address ____________ City ____________ Province ____________

Postal Code ____________ E-Mail ____________ Fax ____________

Phone: Home/Mobile/Work ______________________________

Current Designations ____________ Referred by ____________ Student ID # ____________

CHOOSE YOUR SINGLE USER SUBSCRIPTION: (contact us for multi-platform subscriptions)

Available Subscriptions (Note: When you take an online course, EverGreen Explanatory Notes and Knowledge Bureau Calculators are included in the fees.)	License Duration	Subscription Fees
☐ **EVERGEEN EXPLANATORY NOTES** Qualifies for 15 non-verifiable CE Credits	1 Year Monthly	**Full Payment: $795** (save $39 installment fee) **Monthly payment: $69.50** *plus taxes
☐ **KNOWLEDGE BUREAU CALCULATORS** 15 professional online calculators Qualifies for 15 non-verifiable CE Credits	1 Year Monthly	**Full Payment: $795** (save $39 installment fee) **Monthly payment: $69.50** *plus taxes
☐ **BUNDLE: COMBINE SUBSCRIPTIONS AND SAVE** Evergreen Explanatory Notes + Knowledge Bureau Calculators Qualifies for 30 non-verifiable CE Credits	1 Year Monthly	**Full Payment: $1149** (save 28%) **Monthly payment: $99.00** *plus taxes

Subscription Start Date: ______________________________

Subscription End Date: ______________________________

CHOOSE PAYMENT OPTIONS:

☐ EVERGREEN EXPLANATORY NOTES $ ____________

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IMPORTANT DATES

ONLINE STUDIES: SUMMER 2019 Continuous intake; start anytime.	STUDY SESSION: **June 16 to September 15**	**Choose Your Next Online Course:** RWM™, MFA™ or DFA -Tax or Bookkeeping Services Specialist™ Program. **Early Registration Deadline: June 15, 2019**
VANTAGE SERIES Toronto, Ontario	October 31, 2019	**For thought leaders in wealth management.**
BUSINESS BUILDER RETREAT	**November 9 to 10 > Puerto Vallarta**	Designed especially for entrepreneural leaders **Early Registration Deadline: Sep 15, 2019**
DISTINGUISHED ADVISOR CONFERENCE In beautiful Puerto Vallarta, Mexico	**November 10 to 13 > Puerto Vallarta**	**Theme:** Economic Resilience - Wealth Creation and Distribution in the New Economy **Early Registration Deadline: June 15, 2019**
ONLINE STUDIES: FALL 2019 Continuous intake; start anytime.	STUDY SESSION: **September 16 to December 15**	**Choose Your Next Online Course:** RWM™, MFA™ or DFA -Tax or Bookkeeping Services Specialist™ Program. **Early Registration Deadline: September 15, 2019**
CE SUMMITS: FALL 2019 Choose from one of four great locations	**November 4 > Winnipeg** **November 5 > Toronto** **November 6 > Calgary** **November 7 > Vancouver**	**Theme:** Year-End Planning for Investors and Small Businesses **Early Registration Deadline: October 15, 2019**
ONLINE STUDIES: WINTER 2020 Continuous intake; start anytime.	STUDY SESSION: **December 16 - March 15**	**Choose Your Next Online Course:** RWM™, MFA™ or DFA -Tax or Bookkeeping Services Specialist™ Program. **Early Registration Deadline: December 15, 2019**
CE SUMMITS: WINTER 2020 Choose from one of four great locations	**January 16 > Winnipeg** **January 20 > Toronto** **January 21 > Ottawa** **January 22 > Calgary** **January 23 > Edmonton** **January 24 > Vancouver**	**Theme:** Post-Budget - Action Strategies for Tax and Financial Advisors **Registration Deadline: January 10**

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