

The Only Conference for Leading Tax, Accounting, and Financial Professionals



## 2023 THEME: IMAGINE! Break Free To Embrace Transformative Change

Don't miss Canada's pre-eminent multi-advisory conference for family wealth managers.

### Learn:

- How to **transform and redefine** your role as a Distinguished Professional.
- Gain **mission critical knowledge** and skills armed with insight about the most pressing issues advisors from the tax accounting, legal and wealth advisory industries are facing in working with their high net worth clients.
- How to catalyze **financial peace of mind** by pushing through to the next level of advisory skills, through peer-to-peer connections and business leadership opportunities.
- Build **strong inter-advisory relationships** by networking with leading DAC Acuity Faculty and advisors from across Canada.

*"I can't wait to share cutting edge strategies, bold thinking and bright insights with noted thought leaders and celebrate the next DAC in beautiful Banff!"*

-Evelyn Jacks, President, Knowledge Bureau

*"Attending DAC annually has not only increased my breadth and depth of holistic financial service knowledge, enabling me to stay up to date on relevant trends and important factors impacting my clients today, but has also expanded my national network of diverse financial professionals."*

-Kristin Ramlal, B. Comm (Hons.), PFP, CIM, FCSI, RWM

**EVERYTHING IS INCLUDED WITH YOUR TAX-DEDUCTIBLE TUITION FEES:**

- Pre-approved CE/CPD Accreditation
- All the Educational Sessions
- Virtual Learning Library
- Outstanding Networking Events

**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 (mobile) \_\_\_\_\_

Years in business \_\_\_\_\_  Financial Services  Tax Specialist  Accounting  Other \_\_\_\_\_

Companion name \_\_\_\_\_ Occupation \_\_\_\_\_

Industry \_\_\_\_\_ Designations \_\_\_\_\_

Dietary Restrictions:  For You \_\_\_\_\_  For Companion \_\_\_\_\_

**REGISTRATION FEES: Regular Tuition Fees after September 30 is \$1,995 - Save Money with Early-Bird Rates Below**

**For group rates, please inquire. Those who require CE/CPD accreditation must select a Delegate rate.**

DELEGATE RATES AND DEADLINES (Note: taxes extra)		Companion Rate	VIP Designate, Team or Faculty Member	Instalment Plan ( <i>\$95 instalment Fee and taxes will be applied to First Payment</i> )
<input type="checkbox"/>	<b>October 19 - June 30, 2023:</b> (Save up to \$395 by paying in full)	\$1795	<input type="checkbox"/> \$595 <input type="checkbox"/> \$1,695	<input type="checkbox"/> 4 x \$447.50 each <input type="checkbox"/> with Companion 5 x \$477.00
<input type="checkbox"/>	<b>July 1 - September 30:</b> (Save up to \$200)	\$1,895	<input type="checkbox"/> \$695 <input type="checkbox"/> \$1,795	Full Payment Only
<input type="checkbox"/>	<b>After September 30:</b> (Save up to \$100)	\$1,995	<input type="checkbox"/> \$795 <input type="checkbox"/> \$1,895	Full Payment Only

**WHAT'S INCLUDED:**

**Registration Includes:** Opening reception, educational sessions, plus attendance at the Acuity Conference Dinner, all breakfasts, health breaks, lunch, pre-approved CE accreditation and certification.

**Attendees Responsibilities:** The cost of flights, ground transportation, hotel rooms, entertainment other than as described in the official DAC agenda, tips, porters, parking, personal injury or loss/liability of any kind, including sickness or cancellation insurance, any loss due to uninsured sickness or accident or death. Fees are non-refundable. See hardship policy at <https://www.knowledgebureau.com/site/faq>

**PAYMENT OPTIONS for Individual & Companion**

Payment Method:  E-Transfer  Visa  Mastercard  Amex

Tuition Fee: \_\_\_\_\_ Grand Total: \_\_\_\_\_

Taxes: \_\_\_\_\_ (GST # 885004713RT00001)

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

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

Tuition Paid in Full:  Self \$ \_\_\_\_\_  Companion \$ \_\_\_\_\_

Instalment Plan: 4 payments or 5 payments

**HOTEL ACCOMODATIONS**

Knowledge Bureau has secured a conference rate at the Fairmont Banff Springs Hotel.

To book your hotel accommodations please contact the Fairmont In-House Reservations at 1-833-762-6866. We recommend that callers identify themselves as being with the Distinguished Advisors Conference 2023.

Alternatively, attendees may book via the following online booking link: <https://book.passkey.com/go/DistinguishedAdvisors>

**Register Early!**

**All Fees are \$1,995 after September 30th**

**HOW TO REGISTER**

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

Fax: 1-204-953-4762

Online: [knowledgebureau.com/site/conference/dac-2023](https://www.knowledgebureau.com/site/conference/dac-2023)

Email: [registrar@knowledgebureau.com](mailto: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 and/or by phone, mail, or email as requested.

**YOUR STATUS**

**REFER SOMEBODY AND RECEIVE A \$50 CREDIT**

- Delegate
- Delegate-Spouse
- Sponsor
- Delegate-Designate
- Speaker
- Speaker-Sponsor

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

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

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City, Province \_\_\_\_\_ Postal Code \_\_\_\_\_

Email \_\_\_\_\_

Phone (primary) \_\_\_\_\_ Phone (mobile) \_\_\_\_\_

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**HOTEL ACCOMODATIONS**

Knowledge Bureau has negotiated a special room rate at the spectacular Banff Springs Hotel: \$249 per night plus taxes and \$14 per person Hotel Service Fee.

All visitors to Banff National Park are required to have a valid National Park Pass. For more information on how to purchase a pass please visit <https://www.pc.gc.ca/en/pn-np/ab/banff/visit/tarifs-fees>

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