



STRATEGIC
PARTNER
INFORMATION
PACKAGE

BECOME A PARTNER IN 1 OR ALL 3 TOURS!

See new categories for partner opportunities.

More information available at: www.knowledgebureau.com

NATIONAL EDUCATIONAL WORKSHOP TOURS

**Toronto • Winnipeg • Calgary • Vancouver
Ottawa • Edmonton**

SPRING 2019

Post-Budget Action Strategies
for Tax and Financial Advisors

FALL 2019

Year End Planning for Investors
and Small Businesses

WINTER 2020

Advanced 2020 Personal
Tax Update

"The reason Intuit partners with Knowledge Bureau is simple... the quality of the attendees! They are an engaged audience."

- Scott Zandbergen,
Intuit Group Marketing Manager

"Knowledge Bureau provides our clients with tax training for new staff, as well as seasoned staff looking to enhance their portfolio of services to their clients."

- Marc Labrecque,
Sales Director, Trilogy Software

"Allows us to sharpen our minds with current information which is well-presented, in-depth and relevant to our industry."

- Erik Klumpe,
Regional Director (Canada), Liberty Tax

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

CE SUMMITS

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



A UNIQUE OPPORTUNITY FOR STRATEGIC PARTNERS IN FRONT OF A HIGHLY QUALIFIED AUDIENCE.

WE INVITE YOU ...

to become a leader and mentor as a strategic partner of the CE Summits -- 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

PLEASE JOIN US ...

As a strategic partner in **Knowledge Bureau's CE Summits** 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
- Edmonton
- Vancouver

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

"Absolutely, 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

CE SUMMITS

Partnership Opportunities

SESSION LEADER PARTNERSHIP

Each City: \$2,500 / 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

\$1,950 each. 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 CE Summit:

Back Cover - \$995

Inside Front Cover - \$795

Inside Back Cover - \$795

Taxes extra.

HOST A TABLE OF SIX OR A TABLE OF THREE UNDER YOUR COMPANY BANNER

Register 6 participants at your designated table with your logo and name.

Table of 6 - Each Individual City: \$1,950 (\$325/participant). Taxes extra.

Table of 3 - Each Individual City: \$1,185 (\$395/participant). Taxes extra.

SAMPLE AGENDA

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

Join us in January, May and November.

7:30 - 8:30

DISTINGUISHED ADVISOR BREAKFAST

8:00 - 8:30

REGISTRATION AND COFFEE

8:30 - 9:30

SESSION 1: Strategies for Individual 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
Break partnership

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

1:30 - 2:45

SESSION 5: Family Wealth Planning

2:45 - 3:00

Networking Break and Sponsorship Fair
Break partnership

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

PARTNERSHIP PLEDGE FORM

To confirm your participation as a strategic partner of 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:	SPRING 2019	FALL 2019	WINTER 2020	All Cities
<input type="checkbox"/> SESSION LEADER PARTNERSHIP	<input type="checkbox"/> \$2,500 per city	<input type="checkbox"/> Winnipeg <input type="checkbox"/> Vancouver <input type="checkbox"/> Calgary <input type="checkbox"/> Toronto	<input type="checkbox"/> Winnipeg <input type="checkbox"/> Vancouver <input type="checkbox"/> Calgary <input type="checkbox"/> Toronto	<input type="checkbox"/> Winnipeg <input type="checkbox"/> Vancouver <input type="checkbox"/> Calgary <input type="checkbox"/> Toronto <input type="checkbox"/> Ottawa <input type="checkbox"/> Edmonton	<input type="checkbox"/> All Cities One Tour SAVE 10% <input type="checkbox"/> All Cities Two Tours SAVE 12% <input type="checkbox"/> All Cities Three Tours SAVE 15%
HOST A NETWORKING BREAK/LUNCH <input type="checkbox"/> Morning Break <input type="checkbox"/> Lunch <input type="checkbox"/> Afternoon Break	<input type="checkbox"/> \$1,950 per city	<input type="checkbox"/> Winnipeg <input type="checkbox"/> Vancouver <input type="checkbox"/> Calgary <input type="checkbox"/> Toronto	<input type="checkbox"/> Winnipeg <input type="checkbox"/> Vancouver <input type="checkbox"/> Calgary <input type="checkbox"/> Toronto	<input type="checkbox"/> Winnipeg <input type="checkbox"/> Vancouver <input type="checkbox"/> Calgary <input type="checkbox"/> Toronto <input type="checkbox"/> Ottawa <input type="checkbox"/> Edmonton	
SELECT A CATEGORY:	SELECT A FEE:	SPRING 2019	FALL 2019	WINTER 2020	
LEADERSHIP IN PRINT <input type="checkbox"/> Inside Front Cover <input type="checkbox"/> Inside Back Cover	<input type="checkbox"/> \$1,200 per tour <input type="checkbox"/> \$995 per tour	<input type="checkbox"/> Spring 2019	<input type="checkbox"/> Fall 2019	<input type="checkbox"/> Winter 2020	
HOST A TABLE OF SIX OR THREE UNDER YOUR COMPANY BANNER. Register 3 or 6 participants at your designated table with your logo and name.	Table of 6 <input type="checkbox"/> \$325 each city/person Table of 3 <input type="checkbox"/> \$395 each city/person	<input type="checkbox"/> Winnipeg <input type="checkbox"/> Vancouver <input type="checkbox"/> Calgary <input type="checkbox"/> Toronto	<input type="checkbox"/> Winnipeg <input type="checkbox"/> Vancouver <input type="checkbox"/> Calgary <input type="checkbox"/> Toronto	<input type="checkbox"/> Winnipeg <input type="checkbox"/> Vancouver <input type="checkbox"/> Calgary <input type="checkbox"/> Toronto <input type="checkbox"/> Ottawa <input type="checkbox"/> Edmonton	

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

PAYMENT:

Purchase Order attached; please invoice us, or Pay by Credit Card: VISA MC Cash/Money Order

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

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