

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:



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.

### 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.**

**TAKE A  
FREE TRIAL  
TODAY!**

**"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*

**For more details visit [www.knowledgebureau.com](http://www.knowledgebureau.com) or call toll-free: 1-866-953-4769**

The RWM™, MFA™, MFA-P™, DFA-Tax Services Specialist™ and DFA-Bookkeeping Services Specialist™ designations are registered certification marks of Knowledge Bureau™

# 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
  - Separation 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
- New for 2018 and Beyond

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™

# 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