Knowledge Bureau®

World-Class Financial Education

Learn a critical financial life skill and help others in your community as a

DMA - Personal Tax Services Specialist™

Earn new Specialized Credentials as a Distinguished Master Advisor™

As a DMA - Personal Tax Services Specialist™ you'll learn personal tax filing on a deep level for employees, investors, small business owners, seniors and families. Offer confident tax planning advice to those experiencing new life events that include births and deaths, marriages and divorces, career starts or stops, or new asset acquisitions.

Accreditation:
30 CE/CPD Credits*
Per certificate course

Qualifies for Canada Training & Tuition Credits

Work at Your Own Pace!
Continuous intake 24/7
Take up to three months per 30 hour certificate course

DISTINGUISHED DMA MASTER ADVISOR

Your Program Enrolment Includes:

- Personal course selection consultation and virtual campus orientation
- Lesson plans and study plans
- Personal instructor support by email
- Comprehensive online Knowledge Journal
- Tax Tip Toolkit: EverGreen Explanatory Notes and RWM™ Discovery Calculators
- Practical true-to-life case studies using professional software
- Testing and certification

Start a New Career with marketable skills in:

- Income Tax Preparation
- Tax Accounting for Small Businesses
- Wealth Management
- Insurance Advisory
- Financial Planning
- Trust Offices
- Or build your tax accounting practice by educating your whole team as professional tax practitioners.

Start today - Study online - Everything is included!

Student Testimonial:

"Every tax preparer in my small company now has completed more than one Knowledge Bureau certificate course. I am proud to say that I have achieved the Tax Services Specialist Designation, and most of my staff are well on their way to either a diploma or a designation."
- Wayne Blackmere, ON

1.866.953.4769 learn@knowledgebureau.com www.knowledgebureau.com

DMA - Personal Tax Services Specialist™

Level 1 Courses: Core Professional Skills

Build your core professional skills by taking the three courses below

Professional Income Tax Filing – Level 1

This course introduces a proven process for consistently accurate T1 tax preparation services with a professional client interview and document management system, as well as a thorough understanding of tax preparation for the five anchor profiles upon which every personal tax return is based—credit filing, employees, families and children, investors, and seniors.

Professional Income Tax Filing – Level 2

Fully updated into the latest federal budget and featuring true-to-life scenarios, this comprehensive course delves deeply into more complex filing for claiming employment expenses including commission sales, retirement and investment income, capital gains and losses, filing for business start-ups, and a comprehensive overview of claims for medical, disability, and death of a taxpayer scenarios.

Filing Proprietorship Returns

Learn how to account for the taxation of income for proprietorships including GST/HST requirements, claiming of business expenses, including business assets, home based businesses, hiring human resources, inventories, disposing of and replacing a business, farming and fishing enterprises, professionals and partnerships.

Level 2 Courses: Mastery & Specialization

Earn specialized skills and deep professional knowledge:
Complete your designation program with these three additional courses

Filing T3 Returns

Trust filing in Canada has significantly changed and this course will help you decipher the new rules. It introduces you to 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. The students will also learn how to optimize taxes payable on income earned by a trust with the Trust Tax Estimator tool, provided with this course. The new filing requirements for bare trusts will also be discussed.

Filing Final Returns at Death

This course deals comprehensively with the taxation of individuals at death and the new relationship survivors will have with the CRA when taxpayers die. Gain a thorough understanding of how income and capital accumulations are taxed on final returns and learn strategies to minimize taxes.

Cross Border Taxation

The student will learn the key concepts surrounding residency, non-residency, immigration, emigration, taxation of U.S. citizens and Canadian residents with cross-border transactions. Learn about the lifetime gift & estate tax exemption and how to File FinCEN 114 forms and other changes under the Canada-U.S. Tax Convention.

Student Testimonial:

"This course includes a tremendous amount of useful information. My objective was to learn how to prepare tax returns for small proprietorships, in order to expand my practice. In addition, I do bookkeeping for small businesses and was keen on gaining a better understanding of tax requirements, so that I could be a better bookkeeper. I have acquired a wealth of knowledge and feel a lot more confident about the services I am offering to my clients".

—Sylvie G., YT

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Explore Your Pathway To Success

Specialized Credentials and Lifelong Learning with Knowledge Bureau

Join thousands who have earned new credentials with Knowledge Bureau

Over 1.2 million	Online course module registrations
Over 24,000	Technical training certificates issued
Over 15,000	Knowledge Bureau Report (KBR) subscribers
Over 11,500	Active students in certificate and designation programs
Over 15,000	CE Summits & Distinguished Advisor Conference attendees

Start Today! Count on Us For:

- Practical training you can use right away as you enhance your career, your business, and the work you and your team do for your 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 or as a business deduction.
- All course materials, custom-designed software tools, research library, quizzes, testing and personal support are included in the single fee.
- Continuing education credits from most professional bodies and regulators.

"Our team of educational consultants and instructors make all the difference. We are always by your side as you study in the convenience of home or office. We want you to make the best educational decisions for your time and money and we are here to help."

- Evelyn Jacks, President of Knowledge Bureau

Register Now to Earn Your Certificate of Distinction

Whether you take one certificate course at a time or the entire Distinguished Master Advisor Program, you'll embrace new professional skills and position yourself for new growth in earnings. Many successful tax accounting and financial advisory firms have incorporated the DMA Distinguished Master Advisor program into their team with great results.
Don't be left behind!

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