

# TAX ACCOUNTING SERVICES SPECIALIST™



## ESPECIALLY FOR:

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

## FACULTY OF BUSINESS ACCOUNTING

Financial Accounting & Bookkeeping for Small Business

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 financial transactions and statements.

### WHY BECOME A TAX ACCOUNTING SPECIALIST?

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.

### STUDY ONLINE - 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 well-known professional software
- > Calculators and tools you can use immediately
- > Testing and certification
- > CE/CPD accreditation by various professional bodies



**“Having graduated from this designation program with honors, I have enriched my knowledge, improved professional business skills that expands my future career path. Overall, it is an excellent experience to explore throughout the program. “**

- Connie H.M. Zhu

DFA-Bookkeeping Services Specialist™

### Let's Connect :

Phone: 1-866-953-4769 | Email: registrar@knowledgebureau.com | www.knowledgebureau.com

## LEVEL I COURSES - CORE PROFESSIONAL SKILLS

Build your core professional skills by taking the three courses below.

- > 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 in a Digital World

Bookkeeping in a Digital World 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.

#### Knowledge Journal Topics:

- 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

### Accounting for Multiple Business Profiles

In this course, you will learn to manage the bookkeeping functions for a variety of companies to deliver financial results from 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 Topics:

- 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

3

### Advanced Payroll for Small Businesses

Payroll rule changes have created an increased demand for knowledgeable bookkeepers who can administer payroll. Advanced Payroll will help you become a more astute compliance manager, 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 Topics:

- 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

"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™

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World-Class Financial Education

## LEVEL II COURSES - MASTERY AND SPECIALIZATION

Complete your designation with specialized skills and deep professional knowledge by taking the three courses below:

- > 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

### Managing Tax Audit Risk for Small Business

This online certificate course helps position small business owners for potential tax audits in 2021- 2023 with a concise pathway to navigate the complex rules and comprehensive documentation they will need to satisfy queries from clients and manage risk with the CRA.

#### Knowledge Journal Topics:

- Tax Compliance Issues
- Intro to GST/HST for Business Profiles
- Non-Profits & Charities
- Basic Accounting Analysis
- Budgeting Basics
- Cash Flow Budgeting
- Decision Making
- Valuation Approaches - Market Based

5

### Budgeting & Forecasting For Small Business

This course is perfect 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 Topics:

- 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

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. 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 Topics:

- 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

Study online in the safety and convenience of your own home or office.  
Your study plan is flexible and self-paced. Assume 30 hours for each course.  
Take up to 3 months to complete one.

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# THE DMA™ DESIGNATION TRACK

## EARN A DESIGNATION BY DECLARING A SPECIALTY:

The DMA™ Designation is awarded to students who successfully earn 6 Certificates of Achievement as outlined above or take any 4 courses from a specialist category plus any 2 other courses.

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
- Continuing education credits from most professional bodies and regulators



### About Knowledge Bureau:

Founded by tax expert, award-winning financial educator and best-selling author, Evelyn Jacks in 2003, Knowledge Bureau™ is a widely respected financial education institute and publisher based in Canada. Our world-class education solutions are innovative, informative, and in-depth, with a multi-disciplinary approach to professional development in the tax, accounting, bookkeeping and financial services.

### Join Thousands Who Have Earned New Credentials

Over 1 million Online course module registrations

Over 23,000 Technical training certificates issued

Over 17,800 Knowledge Bureau Report (KBR) subscribers

Over 11,000 Active students in certificate and designation programs

Over 14,100 CE Summits & Distinguished Advisor Conference attendees

**“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

**“Everything so far has had value to it. These studies have added to my knowledge and skills and I have put this knowledge to use immediately for our clients or I gained new skills which has given me the opportunity to expand our services.”**

- William Samplonius, DFA-Bookkeeping Services Specialist, ON

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