



Become a
**World-Class Leader in
Financial Education**

WITH TURN-KEY LEARNING SOLUTIONS FROM KNOWLEDGE BUREAU

**Enhance Your
Learning Culture**

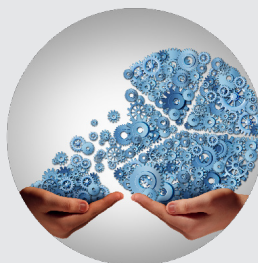
Creating a learning culture is the
#1 driver of great work culture,
and the numbers tell the story...
it's great for business, too!

Retention



94% of employees said they
would stay longer at a company
that invests in their career.

Personalization



91% want personalized relevant
training.

Profits



24% higher annual profits
reported by companies that spend
\$1,500+ on annual employee
development than those that
spend less.

Source: 5 Employee Development Statistics You Haven't Heard Of | ClearCompany

Engage With Us: A World-Class Professional Development Institute

**We Offer Three Key
Training Solutions**

Especially designed to help your firm deliver
on a great learning culture and solve key
market problems!



Turn-Key Learning Platform

Customizable end-to-end learning environment with e-commerce
capabilities.



Custom-Labelled, Scalable Content Solutions

Curriculum development, editorial, and publishing services
with unique expertise in business, tax and finance.



Blended E-Learning Options

Best-in-class, virtual or live instruction
program content management and event hosting.

"The materials were well organized, the resources easy to use,
and I quickly became comfortable...I was able to maintain a
quick and steady pace."

Ian Wood
CFP, CLU, CIM, MFA™, RWM™

Let's Connect :

Phone : 1-866-953-4769 | **Email:** learn@knowledgebureau.com | <https://www.knowledgebureau.com>

A Message from Knowledge Bureau's President

We are so very proud of the tens of thousands of students who have earned professional certificates, diplomas and designations with us, including those who come back year over year to earn continuing professional development credits at Knowledge Bureau. These are individuals who are interested in raising their bar – personally and professionally.

They are the people who have the skills for the workplaces of the future, and we would be pleased to help your firm attract and train them. Now, you too can offer world-class financial education to attract, train and retain top resources in your firm. We would be pleased to share our vast library of courses and educational publishing options on a turn-key basis so you can build your learning culture.

Make a great decision: explore a new strategic initiative with Knowledge Bureau. Let's connect!

Evelyn Jacks

**Award Winning Founder and President,
Knowledge Bureau**



Welcome to Knowledge Bureau

We are a national certified, post-secondary institution which provides business and financial education to individuals, professionals and workplaces, leading to verifiable and specialized credentials.

Knowledge Bureau is the only financial educational institution focused on continuing business and professional financial education for occupations in various industry sectors including tax preparation, accounting/bookkeeping, financial services, human resources, as well as public and private education. It also publishes financial literacy education and books for consumers.

We Offer Three Divisions of Cutting-Edge Education

Specialized Credentials

Vocational
Certificates

Specialized
Designations

Continuing Education

For
Professionals

For Business
Owners

Workplace Training

For Leaders in
Organizations

For Owner-
Managers

The Partner Experience

"Knowledge Bureau has earned its reputation as a world class financial educator. Always at the forefront of change, Knowledge Bureau offers a premier educational experience online and in person. I can attest to these facts as a client who has invested in their services across three separate companies, on behalf of our employees and advisors."

Jordy W. Chilcott

Executive Vice-President, Wealth Strategy & Enablement, Wellington-Altus Private Wealth

"Evelyn Jacks and her team of experts at Knowledge Bureau have been a significant part of the success of Dynamic's award-winning Snapshots program. Their continuing education accredited courses have been taken by thousands of advisors across Canada who are interested in strengthening their relationships with clients by offering holistic advice as their clients' lives change."

Yasminka Marcus

Senior Manager, Education, Wholesale and Advisory, Dynamic Funds

"After interviewing several contenders, Financial Knowledge chose Knowledge Bureau to help us meet financial education needs for our clients. We have worked together on numerous projects requiring customization for Fortune 100 companies. It has truly been a great collaborative working relationship for the past several years."

Darcy McLarty

Principal,
Financial Knowledge Network, LLC

We Invite You to Share in Our Success!

1.2 million

16,900

Over 24,100

Over 11,580

Over 15,300

Over 1,800

Online course module registrations leading to CE/CPD credit

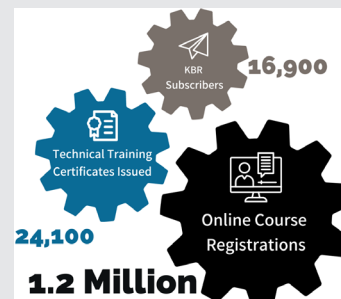
Knowledge Bureau Report (KBR) subscribers

Technical training certificates issued

Active students and grads in and designation programs

CE Summits & Distinguished Advisor Conference attendees

Distinguished Designates



Let's Connect :

Phone : 1-866-953-4769

Email: learn@knowledgebureau.com

https://www.knowledgebureau.com

Knowledge Bureau's Knowledge Wrap®

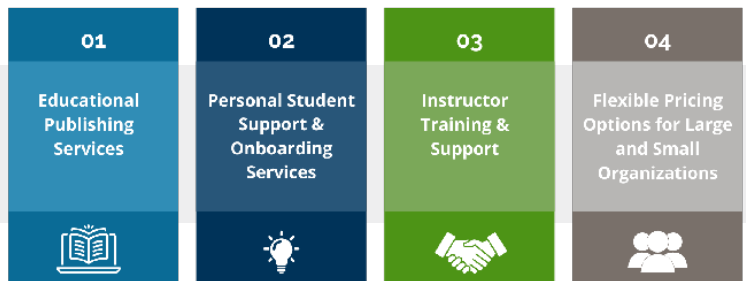
IMMEDIATELY IMPLEMENTABLE END-TO-END LEARNING EXPERIENCES

Experience Turn-Key Learning Onboarding & Continued Education

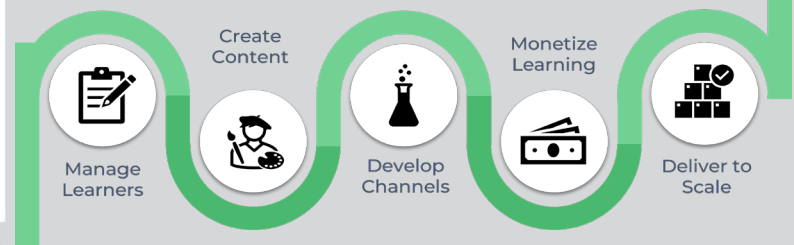
Bring the Future of E-Learning to Your Firm With ...

A Cutting-Edge Student Experience

- 1 Extensive Learning Catalogue
- 2 Intuitive Learner Dashboard
- 3 Executive Summary Reporting
- 4 New Micro-Course Collections



A Modern, Scalable Training Platform



Services Include:

- Needs Assessment and Educational Product Development Mapping
- Licensing and Re-Certification of Professional Certificate Courses and Micro-Courses
- Platform Launching and Maintenance Services

Three Annual Package Options

CAREER BUILDERS

From **\$2,650**
per month

Earn Specialized Credentials from Knowledge Bureau. Select one:

- 1 Certificate Course
- Access to a collection of 15 micro-courses
- 1 CE Summit Blended Learning Program

Co-branded private learning portal

Reporting Dashboard

Certification & Accreditation

Up to 25 students

TEAM BUILDERS

From **\$3,500**
per month

Customized private learning portal

Access up to 30 micro-courses

Research training library & financial calculators

Publishing and Hosting Services

Certification & Accreditation

Up to 50 students

BUSINESS BUILDERS

From **\$6,500**
per month

Customized private learning portal

Your content or license ours

Manager admin access and training

Educational publishing, platform and delivery services

50 and more students: user fees apply

Let's Connect :

Phone : 1-866-953-4769 | Email: learn@knowledgebureau.com | <https://www.knowledgebureau.com>

SPECIALIZED CREDENTIALS

Leading to the DMA™ Designation

Each Certificate Course below takes about 30 hours - start anytime

Our deep, broad and rich curriculum of hundreds of learning modules within certificate or micro-courses can align with your immediate objectives. Explore the programs below at learn.knowledgebureau.com.

Take these courses one at a time online under the **Career Builder Program** or ask us about the full Designation Program.

Hone Personal Tax Skills

Personal Tax Services Specialist™

- ☐ Introduction to Personal Income Tax
- ☐ Professional Income Tax Filing - Advanced
- ☐ Filing Proprietorship Returns
- ☐ Filing T3 Returns
- ☐ Filing Returns at Death
- ☐ Investment Tax Strategies

Hone Bookkeeping Skills

Accounting Services Specialist™

- ☐ Bookkeeping in a Digital World
- ☐ Accounting for Multiple Business Profiles
- ☐ Advanced Payroll for Small Business
- ☐ Budgeting and Forecasting for Small Business
- ☐ Understanding Business Valuation
- ☐ Accounting for Business Growth & Transition

Hone Corporate Tax Skills

Corporate Tax Services Specialist™

- ☐ Corporate Tax Filing Fundamentals
- ☐ Tax Planning for Corporate Owner-Managers
- ☐ Tax Planning for Incorporated Professionals
- ☐ Cross Border Taxation
- ☐ Understanding Business Valuation
- ☐ Use of Trusts in Tax and Estate Planning

Hone Business Skills

Small Business Management Specialist™

- ☐ Leading Teams
- ☐ Building Business Plans
- ☐ Scaling Small Business Operations
- ☐ Understanding Employment & Business Contracts
- ☐ Marketing New Virtual Businesses
- ☐ Debt & Cash Flow Management

Hone Retirement Planning Skills

Retirement Income Services Specialist™

- ☐ Tax-Efficient Retirement Income Planning
- ☐ Use of Trusts in Tax & Estate Planning
- ☐ Investment Tax Strategies
- ☐ Succession Planning for Owner-Managers
- ☐ Personal Pension Planning
- ☐ Advising Family Business



PRACTICE MANAGEMENT DESIGNATION PROGRAMS

Lead a Multi-Stakeholder Approach

RWM™ Real Wealth Manager Program

In this 18-module online program, learn how to manage your clients' strategic wealth plan with multiple stakeholders; and inter-advisory team and multiple generations in the family.

Engage Clients in Charitable Giving

MFA-P™ Philanthropy Program

This program features 3 comprehensive courses:

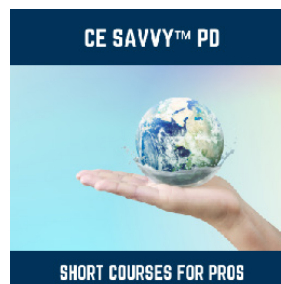
- Introduction to Strategic Philanthropy
- Understanding the Charitable Sector
- Strategic Gift Planning

New CE Savvy™ Micro-Learning Collections

Experience a New Way to Learn with Knowledge Bureau

Continue your academic pathway to professional development with exciting new micro-courses full of issues and trends your clients want to talk about!

Engage in a cool new format that allows for traditional, mobile and social learning, gamification and personalized, data-driven results: keep track of your CE in your own learners dashboard.



Grab an Hour! Just-In-Time, On-Demand Learning Your Way!

Micro-Course Collection Subjects Include:

- Know Your Client
- Investor Profiles
- Asset Management
- Retirement Planning
- Wealth Planning
- Planning for Life's Transitions
- Multi-Generational Wealth Planning
- Finding Financial Freedom
- Starting Your Business
- Building Your Business
- Understanding Tax
- Compensation Planning
- Investments: Diversify Your Risk
- Succession Planning

Let's Connect :

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

CE Summits:

**Learn Your Way at Canada's Most
Comprehensive Technical Training Updates
Especially for Tax, Accounting & Financial Services**

Join Knowledge Bureau President, Evelyn Jacks and Special Guest Instructors for live events offered virtually or in-person, each featuring a comprehensive online course that includes 11 educational components.

The CE Summits Hybrid Learning program includes not only the presentations for the day but access to the accompanying online course, CE quizzes, accreditation and desktop reference, as well as lunch and refreshments at the in-person events. In addition, every student retains a subscription to EverGreen Explanatory Notes and Knowledge Bureau Report (KBR) for the tax season. In-person events provide a complimentary hard-copy Knowledge Journal when you register by the early-bird deadline.

This is your opportunity to exponentially increase your learning experience and meet fellow professionals from coast-to-coast by attending these fun and informative peer-to-peer events, which tens-of-thousands of practitioners have relied on for their CE/CPD since 2003.



☐ **May 22, 2024**
Early-bird deadline: May 15*



☐ **Sept. 18, 2024**
Early-bird deadline: Sept. 15*



☐ **Nov. 6, 2024**
Early-bird deadline: Oct. 15*



☐ **Jan 15, 2024**
Early-bird deadline: Jan. 10*



☐ **Jan. 16, 2024 | Toronto**
Early-bird deadline: Jan. 10*



☐ **Jan. 17, 2024 | Calgary**
Early-bird deadline: Jan. 10*

2024 Acuity Conference for Distinguished Advisors



Montreal, QC
November 10-12, 2024

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

Theme: SAFE HAVENS
Secure Financial Futures & Wealth Potential

Accreditation: 12 - 18 KB. AIC, ICM, CIRO, IAFE, MFDA
submitted for approval

The Student Experience

"It is important that we are proactive in terms of planning our clients' affairs. Knowledge Bureau continues to provide me with relevant knowledge and strategies to help my clients navigate through the complex world of finance, and taxation."

George Donkor
Designate

"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
Designate

"Loved the fact this was a virtual seminar! I found all of the speakers chosen for this seminar to be very well informed, they were qualified professionals which made it an absolute pleasure hearing them speak."

Dipak Ranchod
CE Summit Attendee

Let's Connect!

For an initial conversation about your firm's training objectives and how Knowledge Bureau's learning solutions align with your strategic business plans, please contact us.

Let's Connect :

Phone : 1-866-953-4769

Email: learn@knowledgebureau.com

www.knowledgebureau.com