Your Potential is Limitless™

Knowledge Bureau

World-Class Financial Education™

ENTERPRISE SOLUTIONS

Prepare Your Firm for the Future.

Knowledge Bureau® is a national educational institute focused on excellence in professional development in the tax, accounting and financial services. Having worked with a number of Canadian firms, we are a proven enterprise partner for your business.

www.knowledgebureau.com

ALIGNING EDUCATION WITH FIRM OBJECTIVES

CURRENT ADVISOR PROFILE

EEXPERIENCE, EDUCATION AND ACCREDITATION

CURRENT ADVISOR AND FIRM CLIENT PROFILE

CLIENT BASE SEGMENTS SUPPORTED

TARGET ADVISOR AND FIRM CLIENT PROFILES

- How can we ensure we are maximizing our education and accreditation investments?
- What level of education does our team need to achieve our growth objectives?
- How can we help our advisors differentiate their services and add more value to their clients?

DEFINED WEALTH MANAGEMENT EDUCATION AND ACCREDITATION PLAN

- What client segments does our firm want to serve?
- Where can I find the top minds in specialty areas at a reasonable price?
- How can I integrate 3rd party and partner content and expertise into our existing advisor portal?

DESIGNATION PROGRAMS

CONFERENCE DESIGN AND DELIVERY

CE MODULES AND WEBINARS

KEYNOTE SPEAKERS

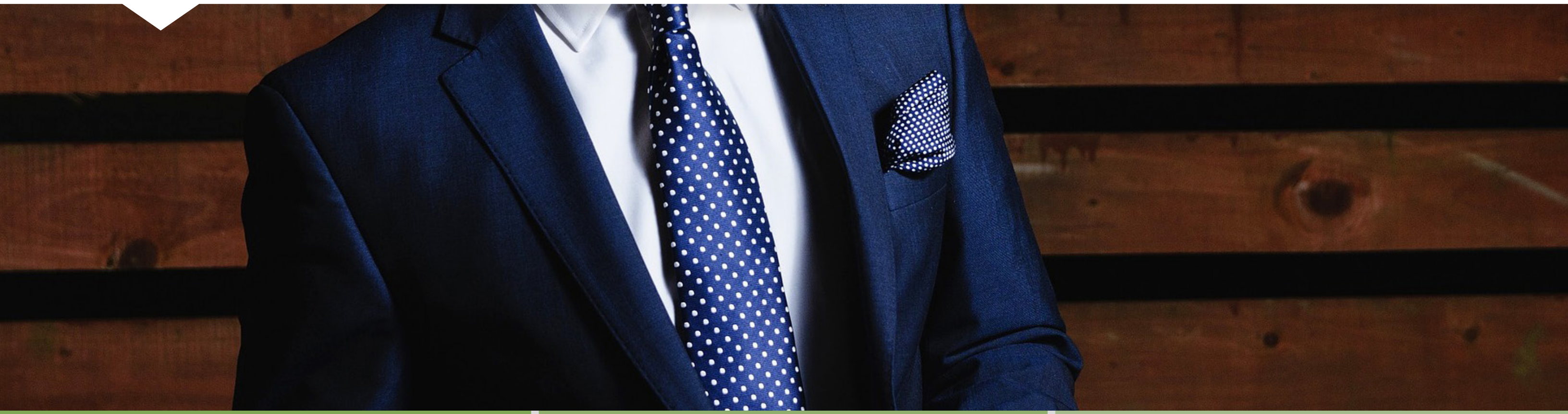
BUSINESS BUILDING RETREATS

WEEKLY MARKET INSIGHTS

MAJOR CENTRE TRAINING

CE SUMMIT WORKSHOP

CO-BRANDED OR WHITE-LABELLED PROGRAMS



Master Financial Advisor

MFA-P™ - Philanthropy Services Specialist

- Introduction to Strategic Philanthropy
- Understanding the Charitable Sector
- Integrating Gift Planning Vehicles in Planning

Master Financial Advisor

MFA™ - Business Services Specialist

- Advising Family Businesses
- Corporate Income Tax Fundamentals
- Tax Planning for Incorporated Professionals
- Tax Planning for Corporate Owner/ Managers
- Business Valuation for Advisors
- Cross Border Taxation

Master Financial Advisor

MFA™ - Retirement and Succession Services Specialist

- Debt and Cash Flow Management
- Tax Strategies for Investors
- Fundamentals of Succession Planning
- Tax-Efficient Retirement Income Planning
- Portfolio Risk Management in Retirement
- Planning with Trusts

Master Financial Advisor

MFA™ - Executive Business Growth Specialist

- Business Leadership, Culture and Continuity
- Strategic Business Planning
- Operation Foundations to Support Business Growth
- Executive Business Builder Retreat

Distinguished Financial Advisor

DFA Tax Services Specialist™

- Income Tax Filing Fundamentals
- Personal Tax Filing and Planning
- Advanced Tax Filing and Planning
- Tax Accounting for Proprietorships
- Tax Accounting on Death of a Taxpayer
- Fundamentals of Filing Trust Returns

Distinguished Financial Advisor

DFA - Bookkeeping Services Specialist™

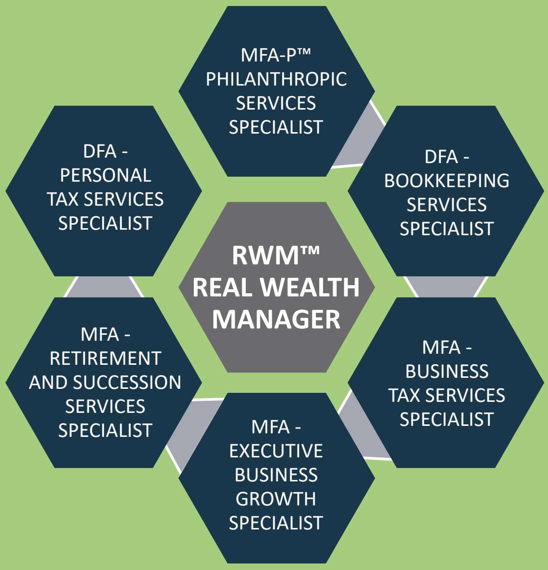
- Bookkeeping for Small Businesses
- Advanced Payroll for Small Businesses
- Debt and Cash Flow Management
- Managerial Accounting and Budgeting
- Accounting for Multiple Business Profiles
- Accounting for Business Growth and Transition

REAL WEALTH MANAGEMENT RWM™ PROGRAM

RWM™ - Real Wealth Manager Program

The Pre-eminent Standard in Wealth Management Services.

- **Act as** the primary advisor through a strategic process of decision making;
- **Listen** for the client's life and financial triggers;
- **Strategize** using the "Four RWM Elements" (accumulation, growth, preservation and transition of sustainable wealth);
- **Manage** the team of specialists to provide required expertise for financial solutions;
- **Implement** the RWM Strategy on an efficient after-tax, after-cost basis with all stakeholders;
- **Analyze** financial data expertly and consistently over time to meet financial milestones; and
- **Review** and adjust the strategy and process to meet ongoing client objectives.



We provide an academic path to the continuing professional development of tax and financial practitioners. A Knowledge Bureau graduate can demonstrate deeper technical knowledge and skills in both online and in-person environments to provide services beyond annual tax filing and compliance, adding insights and value to important family investment and asset management solutions.

A key difference for our graduates is their training in a Real Wealth Management approach, which builds long-term relationships with all the stakeholders in a holistic, client-centric family wealth plan.

This approach also enables higher take-up of government programs and available tax preferences, with sound management of the latest digital service platforms and compliance requirements.

Evelyn Jacks, Founder and President

MULTIPLE DELIVERY MODELS AND OFFERINGS

Certificate Courses

- Online CE Modules
- Prestigious RWM™, MFA™, MFA-P™ and DFA-Specialist™ Designations
- Over 30 Self-Study Certificate Courses
- In-Depth Diploma Programs

Webinars and Podcasts

- Research-based trends and Factoids
- Thought Leadership - interpreting the news
- Lunch and Learns - presentations pre-voiced and designed for unlimited use
- Social Media - compliance-approved educational messaging on key trends and issues, discussed in an approved format/ template. For example:
    - What's the issue?
    - Why it matters
    - Who it affects
    - When to act
    - Solutions to consider

Customized Education

- Regional Workshops
- Roadshow Presentations
- Speaking Engagements
- Custom Technical Writing and Teaching
- Subscription Services and Calculators

Conferences and Summits

- Distinguished Advisor Conference:
    - A recognition of top performers
    - A unique learning and networking experience
    - High-value sponsorship opportunities
- CE Summits in Major Centres
    - Fall 2019: Year-End Tax Planning
    - Winter 2020: Advanced 2019 Personal Tax Update
    - Spring 2020: Post-Budget Action Strategies for Tax and Financial Advisors
- VANTAGE Series for Thought Leaders in Wealth Management
    - Engage with leading minds in the community
    - High-value sponsorship opportunities

"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. Snapshots is an online resource centre helping advisors provide customized and personalized advice and resources to clients at various life-changing events. Evelyn and her team provided valuable in-depth advisor education courses on a variety pf the life events covered including: Leaving a Job, Ailing Parent, Home Ownership and Disability. 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

Knowledge Bureau®

World-Class Financial Education

ENTERPRISE SOLUTIONS

Our goal at Knowledge Bureau is to help you achieve your business objectives.

The first step in our engagement process is a conversation where we ask you questions about your enterprise's objectives, strategies and initiatives. And then, we listen and look for areas where there may be alignment between our organizations.

ENTERPRISE SOLUTIONS

Offer world-class financial education in your firm.

For an initial conversation about what is important to you and your firm, please contact:

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www.knowledgebureau.com