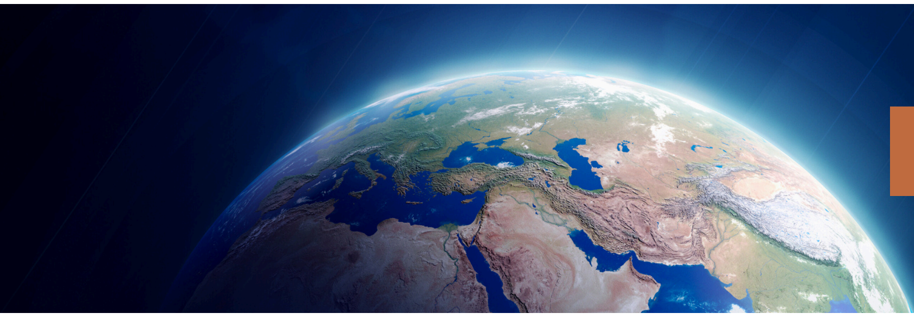
Knowledge Bureau® | World-Class Financial Education

Specialized Credentials Programs



Prepare for Transformative Change

Earn New Credentials in Tax, Accounting & Wealth Management

The Distinguished Master Advisor™ is a technical specialist in one or more financial disciplines: personal tax, corporate tax, accounting, or small business management and business transition services.

Graduates of the Real Wealth Manager™ Designation program are skilled leaders and stewards of a tax-efficient, multi-generational wealth management plan, co-ordinated with clients and their multi-disciplinary advisors.

Graduates of the MFA-P Designation develop, lead and monitor strategic philanthropic plans with multiple stakeholders including the donor, the charity, various financial specialists.

Help Solve Tax & Financial Pain Points

Build Confidence
Engage in Deeper Conversations

Upskill on Tax
Personal, Corporate, Trust & Cross-Border

Bring New Solutions
To Tax, Retirement & Estate Planning

Build New Networks
As a Confident, Trusted Specialist

"Knowledge Bureau is simply the best at helping advisors help our clients."

- Chris Valentine,
DMA, RWM™, FDFS™

"Knowledge Bureau always provides the most up to date information on the new and complex issues in a manner that is clear, concise and engaging. The courses go above and beyond any other training, as they get right to the heart of the matter."

– Joanne Thomas,
DMA, RWM™ , FDFS™

Let's Connect :

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

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DMA Designation Program

Become a Distinguished Master Advisor

Choose from 5 areas of Specialization:

Customize Your Studies!

Select from the suggested curriculum options below (6-30 hour certificate courses in each program) or customize your studies at no extra charge.

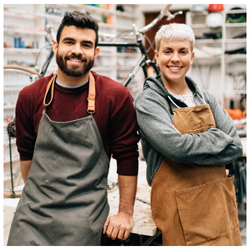
Personal Tax Services Specialist™

Work in Tax, Accounting & Financial Services

Learn all aspects of personal tax filing on a deep level for employees, investors, small business owners, seniors and families who experience life events including new births, new personal residences, snowbirding, disability and death. Offer confident, high value advice preparing personal tax returns.

Courses:

- ☐ Professional Income Tax Filing - Level 1
- ☐ Professional Income Tax Filing - Level 2
- ☐ Filing Proprietorship Returns
- ☐ Filing T3 Returns
- ☐ Filing Returns at Death
- ☐ Cross Border Taxation



Corporate Tax Services Specialist™

Work in Tax, Accounting & Wealth Advisory Offices

Learn about corporate tax filing fundamentals and then help owner-managers who may include incorporated professionals plan compensation: salary, dividends, capital gains and bonuses. Assist with transition and succession planning pain points.

Courses:

- ☐ Corporate Tax Filing Fundamentals
- ☐ Tax Planning for Corporate Owner-Managers
- ☐ Tax Planning for Incorporated Professionals
- ☐ Investment Tax Strategies
- ☐ Succession Planning for Corporate Owner-Managers
- ☐ Tax Efficient Asset Transition Planning

Accounting Services Specialist™

Professional Skills Critical to All Businesses

Learn to apply comprehensive accounting and bookkeeping skills using professional software to multiple business profiles, prepare payroll, and management accounting functions. Deepen knowledge on business succession requirements, too.

Courses:

- ☐ 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

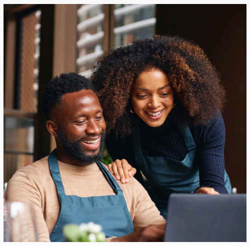
Business Transition Services Specialist™

Future-Focused Tax & Financial Planning

To professionally advise family business owners on business transitions, this professional must understand tax planning across personal, corporate, and trust structures. Help solve business growth and transition opportunities with confident knowledge.

Courses:

- ☐ Advising Family Business
- ☐ Tax Efficient Asset Transition Planning
- ☐ Use of Trusts in Tax & Estate Planning
- ☐ Tax Planning for Corporate Owner-Managers
- ☐ Tax Planning for Incorporated Professionals
- ☐ Understanding Business Valuation



Small Business Services Specialist™

Lead Your Team & Work with Business Owners

Business owners need to work on their businesses instead of just in them. Help develop business and succession plans as well as foundational policies and procedures to position the firm to scale. Learn more about business contract law, privacy and security matters critical to business success.

Courses:

- ☐ Leading Teams
- ☐ Building Business Plans
- ☐ Scaling Business Operations
- ☐ Understanding Contracts
- ☐ Privacy Principles
- ☐ Succession Planning

Choose from Two Pathways to Earn Your DMA Designation

☐ The DMA Designation Program

Fast Track with the Full Program to Specialization.

Select one of the five areas of specialization above and take the six courses shown. It is possible to switch 2 of the courses in the specialization with others in the program.

Study Plan: Take up to 18 months to complete the program
Tuition Plan: save 30% on tax-deductible tuition fees.

☐ The Vocational Certificates

One Course at a Time

Take one course at a time. Choose from the 30 hour certificate courses listed above

Study Plan: Take up to 3 months to complete each course..
Tuition Plan: Save money when you enrol by sessional deadlines.

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World-Class Financial Education

Designation Programs

For Experienced Tax & Financial Advisors

Real Wealth Manager™ Program (RWM)

Provide Tax Efficient Wealth Management Services

Learn the skills to develop strategies for accumulation, growth, preservation and transition of sustainable wealth.
The RWM™ leads a multi-disciplinary advisory team with a deeper Know Your Client process that begins with a multi-generational approach, a systematic holistic analysis of tax efficient net worth and brings objective-based advice to joint decision-making.

Accreditation: : 30 KB, 20 CIRO PD | 20 AIC | 20 MFDA PD

Join the Society of RWM™

Become Connected with Real Wealth Managers™ from Coast-to-Coast.

RWMs are influential advocates, educators and stewards in the tax and wealth management services. Society Membership included for program undergrads.

Connect, Contribute, Collaborate!

Strategic Philanthropy Program (MFA-P)

Provide Planning Services focused on Charitable Giving

The MFA-P provides specialized professional credentials to enable high-value philanthropic planning for individual and family legacies.

3 Courses in the Program:

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

Accreditation: 25 KB | 25 CAGP | 14 IAFE & 1 Ethics | 20 CIRO & 3 Compliance Credits | 15 MFDA PD

Important Information About Knowledge Bureau Programs

Everything is Included in Your Tax Deductible Tuition Fees!

- Personal Consultation and Orientation
- Comprehensive Knowledge Journal
- Tax Tip Toolkit (EverGreen and RWM™ Calculators)
- Lesson Plans & Study Plans
- Comprehensive Knowledge Journal
- Tax Tip Toolkit (EverGreen and RWM™ Calculators) Lesson Plans & Study Plans
- Testing & Certification, CE/CPD Accreditation
- Personal Instructor Support

Did You Know?

Your Knowledge Bureau Education may qualify for:

- Tuition tax credits
- Canada Training Credit
- Canada Job Training Grants in some provinces
- EZ Instalment Plan

Inquire About Additional Educational Options from Knowledge Bureau:

CONTINUING EDUCATION

WORKPLACE TRAINING

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Tuition Guide and Application Form

TUITION FEES	# of Courses	Maximum Study Time (months)	Regular Tuition Per Course	Designation Savings	Total Fees	Cost per Course	VIP Graduates Save $100 More	VIP Designates & Groups Save $200 More
DMA PROGRAM								
Designation Program	6	18	$995	Save over 30%	$4,170	$695	$675	$660
Vocational Certificate	1	3	$995		$995	$995	$895	$795

DMA Designation Programs - Choose Your Specialty & Save the Most:

- ☐ Personal Tax Services Specialist™
- ☐ Corporate Tax Services Specialist™
- ☐ Accounting Services Specialist™
- ☐ Business Transition Services Specialist™
- ☐ Small Business Management Specialist™

Vocational Certificate Program:

Take one course at a time.
Each individual course is 30 hours. Take up to 3 months to complete.

Ask About Our EZ Pay Instalment Plan!

RWM™ & MFA-P PROGRAMS

TUITION FEES	# of Courses	Maximum Study Time (months)	Total Fees	VIP Graduates Save $100 More	VIP Designates & Groups Save $200 More
RWM	1	9	$1,895	$1,795	$1,695
MFA-P	3	9	$1,795	$1,695	$1,595

All taxes are extra. Need extra time? Only $175 per additional month.

NEW TO TAX?

Canada's Income Tax Fundamentals Course!

Only $395

Stand-alone certificate course great for those with no previous tax or financial work experience.

IDENTIFICATION

☐ Individual ☐ Qualify for Group Discounts (Register 2 or more)

First Name: ____________________ Last Name: ____________________

Company: ____________________ Designations: ____________________

Address: ____________________ Prov./Postal Code: ____________________

Email: ____________________

Home Phone: ( ) __________ Mobile: ( ) __________ Work Phone: ( ) __________

Group Liaison Name & Phone #: ____________________

COURSE SELECTION

☐ DMA Designation* ☐ DMA Certificate Course Selection **:

☐ RWM ☐ MFA-P ____________________

☐ Canada's Income Tax Fundamentals Course

TOTAL TUITION $ __________

TAXES (885004713RT001) $ __________

TOTAL DUE: $ __________

PROMO CODE: __________

*Select DMA Specialization above.
**One course at a time, make your Course Selections on Page 2

PAYMENT METHOD

☐ **VISA** ☐ **MasterCard** ☐ **AMEX** ☐ **E-Transfer**

Card Number: ____________________

Expiry Date: __________ CVV __________

Name on Card: ____________________

Signature: ____________________

☐ **I agree to receive course updates, scheduling, communications, certifications and transcripts from Knowledge Bureau.**

For Curriculum, Pre-requisites, Academic and Refund Policies, Standards of Conduct and procedures go to: https://www.knowledgebureau.com/site/faq