

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

DMA - Small Business Management Specialist™

Earn new Specialized Credentials as a Distinguished Master Advisor™



Business owners need to work on their businesses instead of just in them. As a DMA™- Small Business Management Specialist, 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.



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



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 case studies using well-known professional software
- Testing and certification

Start a New Career with marketable skills in:

- Business Owners
- Entrepreneurs
- Accounting Professionals
- Tax Practitioners
- Business Consultants

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



Level 1 Courses: Core Professional Skills

Build your core professional skills by taking the three courses below

Leading Teams

When a business grows beyond the work of a sole-owner-manager, it's important to build a team and a great team culture for getting results. That means leadership methods and styles must change to the benefit of all the stakeholders to growth of the business. This course will help you understand what is required to build your skills and to be prepared for continuous change as your business evolves towards expansion and maturity.

Building Business Plans

Planning for income, profit and long-term sustainable growth requires a strategic approach to business planning. Learn more about how to structure and plan for the financial results you need to grow a market driven business someone will eventually buy.

Scaling Business Operations

Business leaders recognize that client relationships are integral to long term success, but this can only be achieved with the support of the right management and operational environment. The focus of this course is on establishing and enhancing a company's operational framework around which client relationships can be built and retained.

Level 2 Courses: Mastery & Specialization

Earn specialized skills and deep professional knowledge:

Complete your designation program with these three additional courses

Understanding Contracts

This course offers provides a basic understanding of the legal framework that businesses generally operate under. It provides students with the ability to recognize and identify potential legal traps. The course also provides practical tips that allow for the review and understanding of basic contract language and provisions.

Privacy Principles

This course will introduce you to your obligations towards management of personal information in your possession. This includes identifying what is personal information and sensitive personal information, best practices in relation management of collection, use, storage, retention, and destruction of personal information so as to build credibility and reputation in your business.

Succession Planning

This course will help advisors become valuable resources to their clients in the succession planning process. Key concepts include understanding the importance of succession planning for the business and key positions within the business. It focuses on roles and financial issues, from both the perspectives of a business leader and successor. It also addresses the impact of succession on employees and the business as a whole.

Student Testimonial:

"My objectives were definitely met. I particularly appreciated the detail of walking through the process using the Succession Map tool offered with this course."

—Delores M., SK



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!

