Knowledge Bureau®

World-Class Financial Education

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

DMA - Corporate Tax Services Specialist™

Earn new Specialized Credentials as a Distinguished Master Advisor™

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.

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

DISTINGUISHED DMA MASTER ADVISOR

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:

- Tax Practitioners
- Bookkeepers & Accountants
- Business Consultants
- Owner-Managers
- Financial Planners
- Insurance Advisors

Start today - Study online - Everything is included!

Student Testimonial:

"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, life and taxation."
- George Donkor, On

1.866.953.4769 learn@knowledgebureau.com www.knowledgebureau.com

Level 1 Courses: Core Professional Skills

Build your core professional skills by taking the three courses below

Corporate Tax Filing Fundamentals

This course serves as an introduction to the filing of a corporate income tax return for small business operating under a corporate structure as a Canadian Controlled Private Corporation (CCPC). From a company's transformation from Proprietorship through to Corporation, this course will teach you the fundamentals of filing a T2 return for the majority of small business corporations. operating in Canada today.

Tax Planning for Corporate Owner-Managers

This course has been designed to teach you how to advise private business owners and managers about the best ways to manage his or her compensation to maximize the amount of after-tax income available. You will gain a solid understanding of the options available when constructing compensation packages.

Tax Planning for Incorporated Professionals

This course focuses on personal and corporate tax planning for small to medium sized businesses, owned and operated by professionals, with a special focus on financial advisors and medical practitioners. Retirement and succession planning is also an integral part of the course.

Level 2 Courses: Mastery & Specialization

Earn specialized skills and deep professional knowledge:
Complete your designation program with these three additional courses

Investment Tax Strategies

Learn a strategic and tax-efficient investment income planning process which places capital accumulations in the right hands of individuals in the family. The objective is to save capital and earn investment income with tax-efficiency and then to average down the tax paid on both by arranging to share with family members within the tax rules allowed. As important: planning to avoid tax erosion of the capital at transition times.

Succession Planning for Owner-Managers

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.

Tax in Asset Management

This course covers a holistic retirement income planning process. You will acquire the knowledge to do a proper assessment of client vision and goals for retirement and engage them in a consistent process for addressing the three trigger questions that cause financial decision-making—life, financial, and economic events

Student Testimonial:

"This program was very challenging and the information contained was valuable to me in my practice. I plan to keep my journal nearby as a reference when required. This is a very valuable program for anyone in private practice."

- Heather McLeod, Business Services Specialist

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Explore Your Pathway To Success

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!

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