Earn Specialized Credentials to Have High-Value Legacy Conversations

DIFFERENTIATE YOURSELF

Earn Your Designation as a MFA-P™

ESPECIALLY FOR:

- Accounting and Tax Practitioners
- Estate Planning Lawyers
- Gift Planning Advisors, Trust Officers
- Wealth Advisors, Financial Planners
- Insurance Advisors

FACULTY OF STRATEGIC GIFT PLANNING

Your Potential is Limitless™

Only with:

Knowledge Bureau®
World-Class Financial Education

Become a certified professional in the evolving field of philanthropy. Build trusting relationships with your clients and help them make a difference in the world through charitable giving.

BECOME A MASTER FINANCIAL ADVISOR!

There is an emerging investment trend increasingly important to investors of all ages: strategic philanthropy. But few advisors deliver what clients want: integrating personal values with tax and financial plans.

TAKE A FREE TRIAL TODAY!

EVERYTHING IS INCLUDED:

> Personal course selection consultation and virtual campus orientation
> Lesson plans and study plans
> Personal instructor support by email
> Comprehensive Knowledge Journal
> EverGreen Explanatory Notes - Online Research Library
> Practical case studies using professional software
> Calculators and tools you can use immediately
> Testing and certification
> CE/CPD accreditation by various professionals

Knowledge Bureau is a widely respected education institute and publisher based in Canada. Our world-class education is innovative, informative, and in-depth, with an academic approach focused on knowledge, skill building and leadership.

Join thousands who have earned their credentials in the comfort and convenience of their own home or office, at their own pace. **Take a free trial and make a risk-free decision.**

"CAGP is excited about realizing a long-time dream to offer a designation to advisors who want to work more closely with charitably-minded clients to have community impact in mind when planning their finances, retirement and succession."

Ruth MacKenzie,
President and CEO, CAGP

FOR MORE DETAILS VISIT WWW.KNOWLEDGEBUREAU.COM OR CALL TOLL-FREE: 1-866-953-4769

DIFFERENTIATE YOURSELF WITH THE MFA-P™ DESIGNATION OFFERED EXCLUSIVELY BY KNOWLEDGE BUREAU!

THE MFA-P™ provides specialized professional credentials to enable high-value planning for individual and family legacies

> Learn to have highly satisfying conversation with clients sooner in your relationship

> Address their big fears: that gifts will not be used

> Plan for solutions that are tax-precise now and in the future

1

Introduction to Strategic Philanthropy

Learn how to tap into clients' philanthropic goals, and in the process increase opportunities to build trust by understanding clients' values and critical personal causes.

Then engage and get multiple stakeholders all on the same page, with broad principles and objectives in deploying a successful charitable giving strategy. Obtain a precise understanding of how to integrate the tax aspects of charitable giving.

In this course you will learn how to plan to integrate your clients values with new technical expertise about the assets your clients wish to deploy in their giving: from cash, to gifts-in-kind to deferred gifts made by bequests in the Will.

Six modules cover:

- **Why Families Give**
- **The Role of the Advisor**
- **Personal Tax Aspects of Charitable Giving**
- **Ways to Give - Assets Other Than Cash**
- **Deferred Gifts - Tax Aspects**
- **What a Successful Plan Looks Like**

2

Understanding the Charitable Sector

Obtain a deeper knowledge of emerging philanthropic and fundraising trends to guide clients' giving objectives towards the right investment options and charitable structures that ensure gifts will be used wisely and according to their wishes.

This course provides foundational knowledge for navigating and assessing the charitable landscape including non-profits, public and private foundations, and donor advised funds. Students will be equipped to provide guidance in evaluating giving options by mapping the charitable ecosystem together with client objectives for their social capital. Learn how to move gifting decision-making from year-end to annual planning and from one-time major gifting to an ongoing tax smart gift plan.

Six modules cover:

- **The Charitable Sector Landscape**
- **Emerging Philanthropic Trends**
- **How Charities Operate**
- **Understanding Tax and Strategic Philanthropy**
- **Legal and Ethical Considerations**

3

Integrating Gifting with Client-Centric Planning

Obtain a deep, broad knowledge of how to apply gift planning vehicles to the objectives articulated by a variety of client profiles. Using true-to-life case studies, anticipate how to help clients assess the impact of their giving, too. In planning with various client profiles, the student will focus on three consistencies: Know Your Client, Know Your Charity and Know Your Investments to achieve client-centric goals in strategic giving.

Learn how to integrate timing of inter vivos gifts with age and health, while managing one to two person life/bequest plans. Then, consider how to invest to plan with securities, insurance, registered products, property in-kind, remainder trusts, and DAF (Donor Advised Funds), all with the last step in the managed process: Measure Your Impact.

Three modules cover

- **Planning with Client Profiles: Families, Singles and Survivors**
- **Planning with Profiles: Business Owners**
- **Planning with Profiles: Legal and Ethical Issues with Vulnerable Clients**

Knowledge Bureau®
World-Class Financial Education

REGISTRATION FORM - ONLINE STUDIES

registrar@knowledgebureau.com
TOLL FREE: 1.866.953.4769

ONLINE 24/7

IDENTIFICATION

Name (first/last): ____________________ **Student ID#:** ____________

Current Designations: ____________ **Company:** ____________

Address: ____________ **City:** ____________ **Province:** ____________

Postal Code: ____________ **Email:** ____________

Home Phone: (____) ____________ **Cell Phone:** (____) ____________ **Work Phone:** (____) ____________

Referred by: ____________ **Promo Code:** ____________

CHOOSE PROGRAMMING

To specialize select 4 courses in your preferred discipline plus two others from any program.

FACULTY OF PERSONAL/CORPORATE TAXATION

☐ **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

☐ **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

* or choose any one course in any program

FACULTY OF BUSINESS ACCOUNTING

☐ **DFA - Bookkeeping Services Specialist™**
- ☐ Bookkeeping for Small Businesses
- ☐ Advanced Payroll for Small Business
- ☐ Debt and Cash Flow Management
- ☐ Managerial Accounting and Budgeting
- ☐ Accounting for Multiple Business Profiles
- ☐ Accounting for Business Growth and Transition

FACULTY OF RETIREMENT PLANNING

☐ **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

FACULTY OF MANAGEMENT

☐ **RWM™ - Real Wealth Manager Program**
The Pre-Eminent Standard in Wealth Management Services

☐ **MFA™ - Executive Business Growth Specialist**
- ☐ Business Leadership, Culture and Continuity
- ☐ Strategic Business Planning
- ☐ Operation Foundations to Support Business Growth
- ☐ Business Law & Contracts
- ☐ Marketing Mastery for Business Builders
- ☐ Executive Business Builder Retreat *

FACULTY OF STRATEGIC GIFT PLANNING

☐ **MFA-P™ - Philanthropy Services Specialist**
- ☐ Introduction to Strategic Philanthropy
- ☐ Understanding the Charitable Sector
- ☐ Integrating Gift Planning Vehicles in Planning

TUITION and STUDY PLAN

BONUS: SAVE $50 MORE WHEN YOU REGISTER BY JUNE 15

EZ-PAY PLAN ($39/course instalment fee)

	Study Period:	Regular Tuition Rates:	Multiple Course Discount:	Savings:	Cost Per Course:	First Payment	Monthly Installments
TECHNICAL SKILLS MASTERY:							
☐ **DESIGNATION** 6 courses	*18 months*	$4,770	$3,570	25%	$595	1 x $384	12 x $285
☐ **DIPLOMA** 3 courses	*9 months*	$2,385	$2,085	12%	$695	1 x $395	6 x $302
☐ **CERTIFICATE** 2 courses	*6 months*	$1,590	$1,390	12%	$695		
☐ **CERTIFICATE** 1 course (ALUMNI)	*3 months*	$795	$745	6%	$745		
☐ **CERTIFICATE** 1 course (NEW STUDENT)	*3 months*	$795	N/A	N/A	$795		
BUSINESS SKILLS MASTERY:							
☐ MFA™- Executive Business Growth	*18 months*	$4,770	$3,570	25%	$595	1 x $384	12 x $285
☐ MFA-P™- Philanthropy	*9 months*	$995	N/A	N/A	$995	1 x $371	2 x $332
☐ RWM™- Real Wealth Manager	*9 months*	$995	N/A	N/A	$995	1 x $371	2 x $332

PAYMENT OPTIONS:

- ☐ **FULL PAYMENT** $ ____________
- ☐ **EZ-PAY PLAN** (1st Payment Only Now, See Above) $ ____________
- ☐ **BONUS - ENDS JUNE 15** $ (50.00)
- **SUBTOTAL** $ ____________
- ☐ **HARD COPY Textbook $125 per course** $ ____________
- **GST/HST (885004713RT001)** $ ____________
- **TOTAL DUE NOW:** $ ____________

PAYMENT METHOD:

☐ **Credit Card** ☐ **Visa** ☐ **MasterCard** ☐ **Cash/Money Order**

Card Number: ____________

Expiry Date: ______/______ **Amount:** $ ____________

Name on Card: ____________

Signature: ____________

For Curriculum, Academic and Refund Policies, and Procedures and Technology Specs go to: www.knowledgebureau.com/ index.php/about-us/knowledge-bureau-policies/

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