

Earn New Leadership Credentials in Strategic Philanthropic Planning



MFA-P™ DESIGNATION PROGRAM

Provide Planning Services Focused on Charitable Giving

Design Meaningful Philanthropic Strategies that Create Lasting Impact for Clients, Families, and Communities.



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.

Strategic Planning for Charitable Giving

The MFA-P™ has specialized professional credentials to enable high-value planning for individual or family legacies. In this dynamic program, learn to have highly satisfying conversations with clients sooner in your relationship, address their big fears: that gifts will not be used wisely or according to personal passions and wishes. Then, provide a consistent process for giving solutions with investments that are tax-efficient, during lifetime and as part of a personal or family legacy.



"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



"All of our partners and faculty members have worked hard to develop a designation program that will be of particular value to advisors working with high net worth clients, as well as those who put social impact at the top of their investment priorities."
- Evelyn Jacks, President of Knowledge Bureau



"I am looking forward to working with firms and advisors to engage in this important industry designation that will add further trust and credibility to the work of advisors, and impact on charities in Canada."
- Brad Offman CEO of Spire Philanthropy.

Who Should Take the MFA-P™ Program?

There is an emerging new trend increasingly important to investors of all ages: strategic philanthropy. But few advisors deliver what clients want: how to integrate personal values with tax and financial plans. Now you can address this need by earning your MFA-P™ Designation.

Especially for Professionals Who are:

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



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.

Start today - Study online - Everything is included!

REGISTER NOW!

learn.knowledgebureau.com/mfap | 1.866.953.4769

Enrol Now or Request More Information

THE MFA-P™ provides specialized professional credentials to enable high-value philanthropic planning for individual and family legacies
Learn to have highly satisfying conversations with clients about charitable giving

Introduction to Strategic Philanthropy

Learn how to tap into clients' philanthropic goals. In the process, increase opportunities to build trust by understanding clients' values and critical personal causes. Engage and get multiple stakeholders on the same page, with objectives for 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 and integrate your clients values with new technical expertise.

Seven modules cover:

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

Understanding the Charitable Sector

Obtain a deeper knowledge of emerging philanthropic and fundraising trends. Learn to guide clients' giving objectives towards the 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. Students will be equipped to provide guidance when evaluating giving options by mapping the charitable ecosystem.

Six modules cover:

- The Charitable Sector Landscape
- How Charities Operate
- Planning for Impact
- Emerging Philanthropic Trends
- Funding of Canadian Charities
- Legal and Ethical Considerations

Integrating Gift Planning

Obtain a deep, broad knowledge of how to apply gift planning vehicles to the objectives of various client profiles. Learn how to stay onside with ethical and legal considerations in doing so. Using true-to-life case studies, the student will learn to anticipate how to help clients maximize their gifts and make impactful gifts while minimizing the costs of giving.

Eight Modules cover:

- Multi-Stakeholder Planning
- Working with Vulnerable Clients
- Guaranteed 10 Pay Insurance Gift
- Legacy Planning for Business Owners
- Donation of Existing Life Insurance Policy
- Using FTS to Lower the After-Tax Cost of Charitable Donations
- Using Insurance to Make a Major Gift
- Using the CPP for Philanthropy

Earn Valuable CE Credits Too!

MFA-P™ Continuing Education:
Program qualifies for these CE Credits:

- ICM 20 CE
- CIRO (Cycle 11)
20 PD & 3 Compliance
- MFDA 15 PD
- Knowledge Bureau 90 CE



Who is the MFA-P™ Program Designed For?

The MFA-P™ Philanthropy Designation program is designed for advisors looking to incorporate charitable giving into their client conversations. This includes financial advisors, investment advisors, life insurance advisors, lawyers and accountants. It is also an important differentiator for advisors seeking prospective high-net worth clients. The MFA-P™ is also a valuable credential for those working in the charitable and non-profit sector.

Why should I enrol in the MFA-P™ program?

The MFA-P™ is designed to help advisors incorporate strategic charitable giving into their client conversations. There are many reasons to discuss philanthropy with your clients:

- Charitable giving is an important part of holistic financial planning, including estate planning.
- It is an opportunity to get to know your clients on a deeper level by understanding their values and an easy way to reach out to your clients' extended families including their children and grandchildren.
- You can help to structure charitable gifts in a simple but effective way and help your clients realize their philanthropic goals while maintaining the integrity of their investment, estate, and tax planning strategies.
- Advisors who connect family values and history as part of a long-term wealth management approach will be well-equipped to address increasing concerns clients have to make a difference in today's world of heightened social awareness.
- All professional advisors interviewed in a Canadian survey entitled The Philanthropic Conversation agreed that having incorporated philanthropy into their practice has strengthened and solidified their business. It is not only the right thing to do; it is unequivocally good for your clients and your practice.

I work at a charity. Is the MFA-P™ program for me?

The program will benefit those who work in the charitable and non-profit sector, as well as consultants and other individuals who support the sector. While designed for advisors, the MFA-P™ program will provide an understanding of charitable giving using a multi-stakeholder approach. The MFA-P™ designation will add credibility to those who cultivate relationships with both their clients and the professional advisors they work with.

Why choose the MFA-P™, in a nutshell?

- Provide unique and valuable service to your existing clients.
- Prospecting for new high net worth and charitable-minded clients.
- A powerful tool to transition your service to the next generation of your clients' family

What are the Re-Certification Requirements?

Your license to use the MFA-P™ marks must be annually renewed to meet Standards of Conduct and continuing education requirements (15 credit hours each year). A \$395 recertification fee also applies by the June 30 annual recertification deadline.

About Knowledge Bureau:

Founded by tax expert, award-winning financial educator and best-selling author, Evelyn Jacks in 2003, Knowledge Bureau™ is a widely respected financial education institute and publisher based in Canada. Our world-class education solutions are innovative, informative, and in-depth, with a multi-disciplinary approach to professional development in the tax, accounting, bookkeeping and financial services.





Register Now to Earn Your MFA-P Designation

Embrace new professional skills and position yourself for new growth in earnings. Many professionals who have graduated from the MFA-P Program have found significant benefits have emerged in both their personal and professional lives. Hear are just some of their stories:



David Ohayon, MFA-P

"I enrolled in the Master Financial Advisor in Philanthropy course seeking to deepen my expertise in the intersection of finance and philanthropy, and I can confidently say it met my expectations. This course not only provided a comprehensive understanding of charitable giving strategies, but also empowered me with practical tools to navigate complex financial landscapes with a philanthropic lens."



CAROL RAME, MFA-P™

"The MFA-P course was a fantastic course. In the ever-changing world of charitable giving, I love how it specializes in financial trends and strategic philanthropy so I can help the families and individuals I work with make the most out of their legacy giving. I loved the flexibility of the online course, and the Knowledge Bureau staff and teachers were always readily available and helpful whenever I needed."



MARIE PHILLIPS
BA(Hons), RCC, CFDS, PFP, FCSI, MFA-P™

"In my nearly 30 years in the Industry this was the single best course I have taken. I enjoyed the time in gaining the knowledge and confidence to discuss philanthropy and look forward to implementing in my business as a Wealth Advisor"



STERLING REMPEL
CFP, CIM, CLU, TEP, MFA-P™

"I chose to complete the MFA-P designation to highlight my commitment to Charitable Planned Giving. Philanthropy is an important part of helping my clients align their values with their finances."

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.



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