

BUILDING BUSINESS PLANS

PROGRAM GUIDE



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ABOUT KNOWLEDGE BUREAU

Knowledge Bureau™ is Canada's leading national post-secondary educational institute for continuing professional development in the tax and financial services. It is focused on providing knowledge and skills required to navigate a rapidly changing environment in the tax and financial services.

Founded in 2003 by bestselling tax author and internationally acclaimed educational entrepreneur, *Evelyn Jacks*, Knowledge Bureau publishes and delivers close to 30 online certificate courses leading to continuing education certification and occupational skills diplomas. It is the home of the *MFA™ (Master Financial Advisor)* designation, which signifies specialization in retirement, business, and succession/estate planning in wealth advisory practices, as well as the *DFA-Tax Services Specialist™* and *DFA-Bookkeeping Services Specialist™* designations for professionals in the tax accounting services.

Knowledge Bureau hosts regional workshops and in-class events in major centres across Canada, taught by industry leaders in a blended learning opportunity with its online courses, and an annual international event, the *Distinguished Advisor Conference™*, which explores strategic wealth management for retirement in locales clients retire to. It also partners with corporate clients and academic institutions, custom-designing CE modules, webinars, and keynotes to meet organizational needs. Finally, Knowledge Bureau is a national publisher of *Knowledge Bureau Newsbooks*, which provide opportunities for Canadians and their advisors to make better financial decisions together through highly interactive news information and educational experiences.

For more information contact Knowledge Bureau at 1-866-953-4769 or visit www.knowledgebureau.com.

**CONGRATULATIONS ON YOUR INITIATIVE TO EXPLORE YOUR INTEREST IN A
NEW FINANCIAL EDUCATION**



A MESSAGE FROM EVELYN JACKS, PRESIDENT

I am delighted to welcome you to Knowledge Bureau! We are excited to help you get started on a world class educational experience to maximize your learning opportunities. We are completely committed to your ongoing success in your professional development and strive to exceed your expectations, because we want to be your educational home.

Here at Knowledge Bureau, we are proud to offer you a comprehensive, true-to-life learning experience so you can graduate from your program selections with the knowledge, skills and confidence to provide outstanding solutions to clients in your chosen field of studies.

We do so by connecting you with cutting edge resources, expert instructors and peer-to-peer networking opportunities that will be thought-provoking. We know you will get better results, simplify efforts and help clients achieve peace of mind in making financial decisions in a complex world. It's so simple to get started; in fact, you can do so today if you wish.

Ready to Enrol? Visit the [Virtual Registrar](#) to enrol yourself conveniently online, anytime. Or, start with a free trial.

Need More Information? Do a Campus Orientation. Schedule a 15-minute orientation call at your convenience today. We'll walk you through the Virtual Campus, help you get started in identifying all your course components, and show you how to access instructor support. Be sure to take advantage of this free service: contact us at 1-866-953-4769 or by email registrar@knowledgebureau.com

Learn More Now: This **Program Guide** features details about the Faculty you are interested in. Please take a moment to consider all of the courses in the program. Following that is a detailed course overview and lesson plans for the course you have shown interest in and the individual course you have selected to get started. Finally, there is an application form you can scan and email directly to us.

Best of Luck with Your Studies!

Sincerely, Evelyn Jacks, President, Knowledge Bureau

MFA™ - BUSINESS GROWTH PROGRAM



ESPECIALLY FOR:

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

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Focus: Sales Leaders and Owner-Managers

This is executive education especially designed for small to medium sized enterprises poised to grow in a new economy.

WHY BECOME A MASTER FINANCIAL ADVISOR?

Help business leaders create and implement strategies, processes and plans that develop and enable business growth. Or take advantage of this educational opportunity to scale up your own enterprise to its greatest potential. Earn your **MFA™ - Business Growth Designation**.

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- | | |
|---|---|
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| > Lesson plans and study plans | > Calculators and tools you can use immediately |
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| > Comprehensive Knowledge Journal | > CE/CPD accreditation by various professional bodies |
| > EverGreen Explanatory Notes
- Online Research Library | |



**"I vow to continually get better.
This topic is near and dear to me.
If I know ... I can share."**

- Paul J. Vaneyk
Executive Business Growth
Specialist, Undergraduate

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MFA™- BUSINESS GROWTH SPECIALIST PROGRAM

LEVEL I COURSES - CORE PROFESSIONAL SKILLS

Build your core professional skills by taking the three courses below.

Learn how to nurture micro businesses with strategic planning and the operational foundations to engage both new employees and new clients, while you help owner-managers transform into powerful leaders.

1

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.

Knowledge Journal Topics:

- Scaling Up
- Your Leadership Career
- Your Vision and Goals
- Building a Sustainable Business Model
- Branding
- Building Team Culture
- Critical Accountabilities
- Making the Right Investments
- Making Technology Work for You
- Your Succession Plan

2

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.

Knowledge Journal Topics:

- Business Planning Landscape
- Business Modelling
- What is Your Market Opportunity?
- Who Is Your Customer?
- Products and Services
- How to Get and Keep Customers
- Management and the Company
- Operations: Production and Support
- Financial Forecasting and Assumptions
- Approaching Financial Partners

3

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.

Knowledge Journal Topics:

- Differing Perspectives
- Business Leader's Vantage Point
- Organizational Structure
- Policies, Procedures and Systems
- Finance and Administration Functions
- Sales and Marketing Functions
- Human Resources Function
- Building Products and Services
- Developing an Action Plan
- Implementation

"In today's ever changing business world, all businesses (large or small) need to continue to grow and scale up in order to keep pace with their clients' needs and retain top talent. Knowledge Bureau's Executive Business Builder Courses can help you achieve the success you are looking for. They provide a straightforward road-map to help leaders (and aspiring leaders) cover all the bases required to move their business forward"

-- Joanne Sigurdson, Author, Leading Teams

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MFA™- BUSINESS GROWTH SPECIALIST PROGRAM

LEVEL II COURSES - MASTERY AND SPECIALIZATION

Complete your designation with specialized skills and deep professional knowledge by taking the three courses below:

Any firm that has an attractive valuation transcends dependence on its founder. Businesses with strong positions in the marketplace - now and in the future - have strong foundations and deliberate strategies for growth in both income and equity. Learn the underlying skills needed.

4

Understanding Employment and Contract Law

Every company requires the interaction with legal talent to develop contracts with the various stakeholders it interacts with. The course provides the background information business owners need to understand basic contractual agreements and templates for engagements

Knowledge Journal Topics:

- Introduction to Contracts
- Leases
- Real Estate Purchases and Sales
- Employment Contracts: Hiring
- Employment Contracts: Terminations
- Incorporation
- Business and Succession
- CASL and DNCL
- Intellectual Property
- Privacy Laws

5

Building and Communicating Your Brand

The old ways of marketing no longer work and competition is fierce. This course focuses on the things that can be done immediately, without huge investment, to navigate these new marketing opportunities and make a market within a community with a compelling value proposition.

Knowledge Journal Topics:

- Principles of Entrepreneur Marketing
- Positioning Your Company for the Future
- Five-Step Marketing Plan
- Psychology of Marketing
- Packaging Your Big Idea
- Introduction to Branding
- Plotting Your Marketing Process
- Advanced Marketing Concepts
- Putting it All Together

6

Team Structure: Recruit, Motivate, Retain

Never has working with people been more important. One can have the best ideas coming from the most talented leaders, the most innovative work structures, and the most accurate forecasts and business plans, but without expert execution by the entire team, the company will not get the results it wants. This course will challenge you to consider your specific role in change management - one which will allow you to take your own personal

Knowledge Journal Topics:

- You, The Leader
- The Team Structure
- The Plan
- The People
- Taking Time for Next Assessment and Evaluation
- Preventing and Addressing Performance Gaps
- Value and Investment Transactions
- Managing Top Performers Most Effectively
- Connecting Your Team to the Big Picture

Study online in the safety and convenience of your own home or office.
Your study plan is flexible and self-paced. Assume 30 hours for each course.
Take up to 3 months to complete one.

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MFA™- BUSINESS GROWTH SPECIALIST PROGRAM

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Ask us about group rates for your whole team of 2 or more.

We would like to create a lasting learning relationship with you and your team, for all your professional development and continuing education requirements.

Count on Us For:

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- Continuing education credits from most professional bodies and regulators



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.

Join Thousands Who Have Earned New Credentials

Over 850,000 Online course module registrations
Over 21,500 Technical training certificates issued
Over 17,000 Knowledge Bureau Report (KBR) subscribers
Over 10,400 Active students in certificate and designation programs
Over 12,700 CE Summits & Distinguished Advisor Conference attendees

"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

"Everything so far has had value to it. These studies have added to my knowledge and skills and I have put this knowledge to use immediately for our clients or I gained new skills which has given me the opportunity to expand our services."

- William S., ON

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 **Knowledge
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World-Class Financial Education

Building Business Plans

OVERVIEW
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.
APPROACH
It might be news to a lot of business leaders that most business plans are lacking in a lot of areas. Although the strategies found in the plan may be of specific use to a company's management, it tends to fall short of what external parties, such as potential financial partners, required to make a financing or investment decision. This course will provide sound internal and external business planning guidelines, resulting in an opportunity to differentiate and distance from others in the marketplace and to support new growth.
WHY IS THIS CONTENT ESPECIALLY TIMELY AND/OR IMPORTANT
The purpose of this course is to understand how to develop a business plan that can be utilized both internally and externally to help a company to move forward. Doing it right involves developing a thorough and complete business model, strategy, and plan (including a financial forecast), as well as preparing to make the approach to potential financial partners. This course also includes a practical component for participants to develop their own business plan. Content is useful for both advisors and their clients, for ongoing management and transactions purposes.
WHAT YOU WILL LEARN?
-
SCOPE OF THE CONTENT:
<ol style="list-style-type: none"> 1. Introduction: The Business Planning Landscape 2. Business Modelling: How it Fits with Business Planning 3. Strategy: What is Your Market Opportunity? 4. Targets: Who is Your Customer? 5. Products and Services: Focus and Differentiation 6. Marketing Strategy: How to Get and Keep Customers 7. Management and the Company 8. Operations: Product/Service Production and support 9. Financial Forecasting and Assumptions 10. Approaching Financial Partners

CHAPTER 1

INTRODUCTION: THE BUSINESS PLANNING LANDSCAPE

KEY CONCEPTS AND ISSUES - WHAT YOU WILL LEARN:

- Business plan definition and use
- Overview of the business planning process
- Internal vs. external perspective (i.e., product vs. market opportunity)
- Research implications
- Practical implications

NEW SKILLS TO BE MASTERED:

- Why proper preparation of a business plan is so critical to a company's success
- How the internal and external focus differ, in terms of business planning
- How these perspectives impact the research aspect of the business planning process

READING GUIDE - KEY QUESTIONS TO BE ANSWERED:

As you read through each chapter, be sure you have your lesson plans open in front of you. They contain a series of questions that help you pull out the most important concepts in your reading. Print out the questions and write in your answers as you read. That's a good way to consolidate your knowledge and commit what you have read to practice and it is a good review prior to your exam.

- What is a business plan?
- What are some uses of a business plan?
- How do the internal and external perspectives differ?
- How is research related to business planning?
- How could business planning be applied to my business?

CHAPTER 2

BUSINESS MODELLING:

HOW IT FITS WITH BUSINESS PLANNING

KEY CONCEPTS AND ISSUES - WHAT YOU WILL LEARN:

- What is a business model?
- What is a business strategy?
- How a business model and strategy relate to the business planning process
- Business modelling process
- Business modelling pitfalls

NEW SKILLS TO BE MASTERED:

- How to develop a cohesive business model
- An understanding of the business modelling process
- Awareness of potential business modelling pitfalls

READING GUIDE - KEY QUESTIONS TO BE ANSWERED:

- What is a business model?
- What is a business strategy?
- How do the business model, strategy, and plan relate to one another?
- What is the business model of my company?
- Are there opportunities to improve the business model of my company?

CHAPTER 3

STRATEGY:

WHAT IS YOUR MARKET OPPORTUNITY?

KEY CONCEPTS AND ISSUES - WHAT YOU WILL LEARN:

- An overview of the external business environment
- How/why the external environment impacts even small businesses
- Industry considerations, in terms of business planning
- Market considerations, in terms of business planning
- Key areas of interest (i.e., size, location, trends, etc.)

NEW SKILLS TO BE MASTERED:

- How the external business environment can impact all companies
- How the industry relates to business planning
- How the market relates to business planning
- How to develop a Vision and Mission Statement

READING GUIDE - KEY QUESTIONS TO BE ANSWERED:

- What industry is my company in?
- What market(s) is my company in?
- What is the general status of my industry and market(s)?
- What are some of the key trends in my industry?
- What are the Vision and Mission of my company?

CHAPTER 4

TARGETS: WHO IS YOUR CUSTOMER?

KEY CONCEPTS AND ISSUES - WHAT YOU WILL LEARN:

- The concept of a target market
- Target market considerations
- Buyer behavior considerations, as they pertain to a target market
- The impact of the target market on marketing strategy
- Capacity considerations, in terms of providing products/services
- Developing revenue related assumptions

NEW SKILLS TO BE MASTERED:

- How to identify the target market
- The relationship between a company's target market and marketing strategy
- An awareness of how the customer/client decision making process can impact a company
- How the target market relates to revenue related assumptions

READING GUIDE - KEY QUESTIONS TO BE ANSWERED:

- What is a target market?
- What is the target market(s) of my company?
- How do our customers/clients make purchasing decisions?
- What is the current capacity of my company, in terms of providing products/services to customers/clients?

CHAPTER 5

PRODUCTS AND SERVICES: FOCUS AND DIFFERENTIATION

KEY CONCEPTS AND ISSUES - WHAT YOU WILL LEARN:

- The importance of product focus
- Product differentiation and competitive advantage
- Competitive advantage for the long term
- Product features and benefits
- Product development considerations/sustainability

NEW SKILLS TO BE MASTERED:

- How to identify products, features, and benefits
- How to approach the concepts of product differentiation and competitive advantage
- Awareness of the importance of a long-term approach to products and services

READING GUIDE - KEY QUESTIONS TO BE ANSWERED:

- What are the main products/services in my company?
- How do these products/services differ from that of competitors?
- What is my company's competitive advantage?
- Does my company have a long-term strategy for products/services?

CHAPTER 6

MARKETING STRATEGY: HOW TO GET AND KEEP CUSTOMERS

KEY CONCEPTS AND ISSUES - WHAT YOU WILL LEARN:

- The marketing strategy concept
- Linking marketing strategy to the target market
- Pricing strategy (i.e., competitive, sustainable profitability, etc.)
- Marketing components (i.e., sales process, promotion, distribution, etc.)
- Brand development considerations
- Strategies for retaining customers

NEW SKILLS TO BE MASTERED:

- An understanding of what is included in a marketing strategy
- How the marketing strategy relates to the target market
- An understanding of pricing related issues
- How branding can be used to differentiate products/services
- How to develop a cohesive marketing strategy

READING GUIDE - KEY QUESTIONS TO BE ANSWERED:

- What is a marketing strategy?
- Is my business' marketing strategy relevant to the target market?
- Does my company have a pricing strategy?
- Does my business have an established brand?
- Does my company have a long term strategy to retain customers?

CHAPTER 7

MANAGEMENT AND THE COMPANY

KEY CONCEPTS AND ISSUES - WHAT YOU WILL LEARN:

- Identifying a company's structure (proprietorship, corporation, partnership, etc.)
- An overview of management/organizational structure
- The importance of identifying skill requirements
- Role and responsibility development
- Professional development and training considerations
- The role of governance and advisors

NEW SKILLS TO BE MASTERED:

- An understanding of how fulfilling important skill/role requirements relates to competitive advantage
- An understanding of how organizational structure and role requirements evolve as a company develops
- How to develop a high-level organizational structure, including key roles
- The importance of leveraging knowledge from advisors

READING GUIDE - KEY QUESTIONS TO BE ANSWERED:

- Does my business have a formal organizational structure?
- What are the key roles in my company?
- Are all important skillset requirements fulfilled?
- Is the organizational structure sufficient to support the operations of the business?
- How could governance and advisor resources be better utilized?

CHAPTER 8

OPERATIONS: PRODUCT/SERVICE PRODUCTION AND SUPPORT

KEY CONCEPTS AND ISSUES - WHAT YOU WILL LEARN:

- Defining a company's detailed operational requirements, in terms of location and premises
- Identifying key systems and processes
- Quality, monitoring, and regulatory considerations
- Outsourcing/contracting strategies
- Capacity-building and leverage
- The linkage between operations and the financial forecast

NEW SKILLS TO BE MASTERED:

- How to identify operational requirements and structure
- How operational strategies can relate to competitive advantage
- Strategies for how systems and processes can be utilized to enhance value
- How operational strategies relate to the financial forecast

READING GUIDE - KEY QUESTIONS TO BE ANSWERED:

- Does my company have defined systems and processes?
- Are there opportunities to improve how my business operates?
- When might contracting/outsourcing strategies be a good approach?
- How do operational strategies impact the financial forecast?

CHAPTER 9

FINANCIAL FORECASTING AND ASSUMPTIONS

KEY CONCEPTS AND ISSUES - WHAT YOU WILL LEARN:

- The linkage between the financial forecast and business plan sections
- Financial forecast format (i.e., Income Statement, Balance Sheet, Cash Flow Statement, etc.)
- Development of assumptions
- Considerations in terms of the amount of financing, use, and rationale
- Financial forecasting pitfalls

NEW SKILLS TO BE MASTERED:

- How a well researched and written business plan can support development of financial forecast assumptions
- An understanding of what is included in a financial forecast
- Approaches for developing assumptions
- How to avoid typical financial forecast pitfalls
- How to develop a financial forecast for a three to five-year period

READING GUIDE - KEY QUESTIONS TO BE ANSWERED:

- How should a financial forecast link to the business plan sections?
- What is typically included in a financial forecast?
- What are approaches that can be used to develop assumptions?
- Why is an understanding of financing requirements and use important?
- What are some financial forecasting pitfalls to avoid?

CHAPTER 10

APPROACHING FINANCIAL PARTNERS

KEY CONCEPTS AND ISSUES - WHAT YOU WILL LEARN:

- Identifying potential financial partners
- Meeting planning considerations
- Materials planning considerations
- Developing the message
- Dealing with questions and information requests

NEW SKILLS TO BE MASTERED:

- An understanding of the general expectations of financial partners
- How to prepare for meeting with a financial partner
- How to present a business opportunity to financial partners
- How to approach questions and requests for information

READING GUIDE - KEY QUESTIONS TO BE ANSWERED:

- Who might be a potential financial partner for my company?
- What are the general expectations of financial partners?
- How should meeting planning be approached?
- Does my company have the skills and experience to conduct a presentation to potential financial partners?



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