

2024 -2025 Educational Calendar

Explore Your Pathway to Lifelong Learning with Knowledge Bureau

Specializations

Accredited Designation Programs & Certificate Courses. Register online 24/7



Accreditation

DMA™ Designations: 30 CE Credits per course
RWM™: 30 KB, 20 CIRO PD (Cycle 10)
MFA-P™: 90 KB, 90 CAGP, 14 IAFE & 1 Ethics, 20 CIRO PD & 3 Compliance



Free Trials!
Program
Orientations

Continuing Education



Accreditation

CE Savvy Summits: 15 CE Credits KB, AIC, ICM, Prov. Insurance Councils & FP Canada
CE Savvy™ Micro-Courses: 5 CE Credits per Collection with KB, ICM, AIC, FP Canada, IAFE



Team Member Group Rates

Conferences & Leadership Development



2024 ACUITY CONFERENCE
For Distinguished Advisors
MONTREAL, QC | NOV. 10-12



Workplace Training

Accreditation

Acuity Conference: 15 KB. Submitted for approval by third parties: including: AIC, ICM, IAFE.
Society RWM™: 15 KB with Tax Tip Toolkit access

March

April

May



Program Orientation

March 4

DMA™ Retirement Income Services Specialist Orientation for prospective students.



Graduate News

April 3

Qualify for graduate & designate VIP training offers. Designates, check out your transcript to explore new leadership and networking opportunities.



Program Orientation

May 7 | 12 PM CST

RWM™ Orientation for prospective students with a live introductory session by practicing RWMs.



Program Orientation

March 28

DMA™ Accounting Services Specialist Orientation for prospective students.



Program Orientation

April 25

DMA™ Small Business Management Specialist Orientation for prospective students.



Retirement & Estate Planning

May 22 | 8:30 AM CST

Early-bird deadline: May 15
Up to 15 CE Credits from: KB, AIC, ICM, Prov. Insurance Councils & FP Canada



Spring Session

March 16 - June 15

Check out sessional tuition offers and register in **Specialized Credentials Programs** (Designations and Certificate Courses) online 24/7.



Knowledge Bureau Report
Subscription includes weekly tax and financial news.



Tax Tip Toolkit

Subscription Includes:
• EverGreen Explanatory Notes
• RWM™ Discovery Calculators

June

July

August



Meeting of the Minds

June 5 | 10 AM CST

Join practicing Real Wealth Managers™ for a live discussion. Free virtual event, open to everyone!



Workplace Training

July 1 - 31

Business Building Consultations:
Consult on your summer and fall workplace training plan.



Open Forum

August 6 | 10 AM CST

Connect, collaborate and contribute with RWM's™. Exclusive to Society RWM™ Members.



Summer Session

June 16 - September 15

Early-bird deadline: June 15
Save up to 30% and more on DMA™ and RWM™, MFA-P™ Designation Programs.



Program Orientation

July 25

DMA™ Corporate Tax Services Specialist Orientation for prospective students.



Program Orientation

August 28

DMA™ Personal Tax Services Specialist Orientation for prospective students.



2024 ACUITY CONFERENCE
For Distinguished Advisors

June 30

Early-bird deadline: Save 20%!

November 10-12
Montreal, QC



Graduate News

August 31

Final deadline: grace period Designate Relicensing Program
Complete CE requirements before the grace period ending Aug. 31

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**Team
Member
Group
Rates**

Conferences & Leadership Development



**Workplace
Training**

Accreditation

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Society RWM™: 15 KB with Tax Tip Toolkit access

September



**Fall
Session**

September 16 - December 15

Check out sessional tuition offers and register in Specialized Credentials Programs (Designations and Certificate Courses) online 24/7.



September 18 | 8:30 AM CST

Early-bird deadline: September 15

Up to 15 CE Credits from: KB, AIC, ICM, Prov. Insurance Councils & FP Canada



September 30

Early-bird deadline: Save 14%!

**November 10-12
Montreal, QC**

October



**Graduate
News**

October 1

Qualify for graduate & designate VIP training offers. Designates, check out your transcript to explore new leadership and networking opportunities.



October 2 | 10 AM CST

Join practicing Real Wealth Managers™ for a live discussion. Free virtual event, open to everyone!



October 24

DMA™ Personal Tax Services Specialist
Orientation for prospective students.

November



November 6 | 8:30 AM CST

Early-bird deadline: October 15

Up to 15 CE Credits from: KB, AIC, ICM, Prov. Insurance Councils & FP Canada



November 10 - 12 Montreal, QC

**Final registration deadline:
November 8**



Need CE Credits?
Take the CE Savvy™ PD or Biz Ed Micro-Course Collections

December



December 3 | 10 AM CST

Connect, collaborate and contribute with RWM's™. Exclusive to Society RWM™ Members.



**Fall
Session**

December 16 - March 15

Check out sessional tuition offers and register in Specialized Credentials Programs (Designations and Certificate Courses) online 24/7.



**Graduate
News**

January 6

Qualify for graduate & designate VIP training offers. Designates, check out your transcript to explore new leadership and networking opportunities.



January 15 | 8:30 AM CST

Live-Virtual Event

Early-bird deadline: January 10

Up to 15 CE Credits from: KB, AIC, ICM, Prov. Insurance Councils & FP Canada



January 14 | January 16 | January 17 | January 18
**Winnipeg
Toronto
Calgary
Vancouver**
Early-bird deadline: January 10

February



**Program
Orientation**

February 27

DMA™ Retirement Income Services
Specialist Orientation for prospective students.



Tax Tip Toolkit

Subscription Includes:
• EverGreen Explanatory Notes
• RWM™ Discovery Calculators