



MEDIA KIT

BUILD YOUR BRAND



Become an Education Partner in the Knowledge Bureau Network

Reach Canada's Most Significant Multi-Professional Advisory Network of Tax, Accounting & Financial Professionals



World-Class Financial Education

The Knowledge Bureau Network Experience: Benefits for Education Partners

Share your story in the Knowledge Bureau Network - a multi-faceted communications opportunity!

Reach a new, deeply engaged audience of tax accountants, financial planners and wealth advisors.

Align your brand with a national community committed to transformative change in their industries and position yourself as an essential part of their next stage of success.

Amplify Your National Presence in the Tax and Financial Services

Six Opportunities to Build Your Brand and Reach New Audiences

- o In Knowledge Bureau Report (KBR)
- o In the Real Tax News Podcasts
- o In Email Directs to Knowledge Bureau students, grads and subscribers
- o At the Virtual CE Summits
- o At the Acuity Conference for Distinguished Advisors
- o In the Educational Toolkit - Integrate your software and tech products in Knowledge Bureau Courseware and provide a scholarship opportunity.

Become an Influencer Pros Count on for Cutting Edge Expertise.

The Partner Experience: Align Your Brand with World Class Financial Education

"We've had an outstanding experience in our collaboration with Knowledge Bureau. From our first conversation to post-launch support, they were genuinely invested in our success with prompt communication, thorough strategy, and a helpful, solutions-focused approach. The result is a polished, easy to use education experience for students."

- Wanda Hunchak
Executive Vice President, Westcap Mgt. Ltd.
Fund Manager for Golden Opportunities Fund Inc.

"Knowledge Bureau always provides the most up to date information on all the new and complex issues in a manner that is clear, concise and engaging. CE Summit and the Knowledge Bureau courses go above and beyond any other training, as they get right to the heart of the matter."

- Joanne Thomas,
DMA - Tax Services Specialist, MFA™, RWM™, FDFS™

Let's Connect:

Phone: 1-866-953-4769 Email: learn.knowledgebureau.com/buildyourbrand | www.knowledgebureau.com



About Knowledge Bureau

About Knowledge Bureau

Knowledge Bureau is a uniquely positioned private educational institute focused on upskilling tax accountants, financial advisors, and their teams, to meet the enormous need for new training given the velocity of regulatory change and digital transformation.

Since 2003, Knowledge Bureau has earned the trust of individual professional learners, entrepreneurs, and leading national organizations, delivering world-class financial education. leading to specialized industry credentials.

Its proprietary operating and publishing systems, known as The Knowledge Wrap, scales curriculum design, content authorship, publishing and student/instructor support processes that are transferable and can be updated with ease.

A Recognized Brand; A Trusted Influencer

A Knowledge Bureau Education includes a strong commitment to news worthiness, as graduates react to weekly tax and economic change.

The Knowledge Bureau Network is significant. Over 20,000 subscribers listen to our podcasts or read Knowledge Bureau Report weekly.

Our websites attract close to 2 million views annually. The average time on site is just under 5 minutes, and we accumulate thousands of new prospective clients every year.

We also work with over 3,000 independent firms and large business to develop their financial educational offerings.

Our courses and programs have been successfully delivered to tens of thousands of adult learners in its over 20 year history.

We have a deep understanding of the end-to-end training requirements of a successful professional education.

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Testimonial

“Financial Knowledge chose Knowledge Bureau to help us meet financial education needs for our clients. We have worked together on numerous projects requiring customization for Fortune 100 companies. It has truly been a great collaborative working relationship for the past several years.”

- Darcy McLarty, Principal,
Financial Knowledge Network, LLC

Testimonial

“Knowledge Bureau has earned its reputation as a world class financial educator. The strategic vision to provide excellence in continuing education to wealth advisors from all the disciplines was ahead of the rest. Always at the forefront of change, Knowledge Bureau offers a premier educational experience.”

- Jordy W. Chilcott, Head of Retail Intermediary Distribution,
Canada, Manulife Investments

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Expand Your Reach with the Knowledge Bureau Network

Website Traffic: Over a Million Page Views Annually

Showcase Your Expertise in Recognized Media and Communications

● KNOWLEDGE BUREAU REPORT (KBR)

Advertorial features, and thought leadership opportunities in Knowledge Bureau's flagship professional news publication. Also reach a highly-engaged media audience from across Canada weekly. Distribution is amplified with social media boosts.

46 issues Per Year

Reach:

- **660,000** Annual Distribution
- **17,500** Average Subscribers
- **25%** Average Open Rate

Amplify Your Social Media Reach with New Audiences Who Engage with the Knowledge Bureau Brand on:

- LinkedIn (Featuring the Business Builder Network)
- Facebook
- Instagram and X
- And Network with The Society of Distinguished Designates

● REAL TAX NEWS (RTN) PODCAST

NEW! Launched in February 2025, and reach is growing! Streaming everywhere you do! Be sure to book to be a guest knowledge leader soon.

● EDIRECTS

Deliver targeted messages directly to Knowledge Bureau's network of tax, accounting, and financial professionals. Reach:

- **1.3 Million** Annual Distribution
- **19,500** Weekly distribution
- **17%** Average Open Rate

Email Audience Demographics:

- **74% Financial Professionals**
- **19% Tax, Accounting, & Bookkeeping Professionals**
- **7% Other Industries**

Showcase Your Expertise in Educational Programs

● VIRTUAL CE SUMMITS

Show how your products integrate with the work of tax and financial advisory practices. These influential pros will use your products and teach their returning and seasonal staff to do so as well.

Reach Over 500 returning students in one or more of 5 virtual events and online study opportunities.

● ACUITY CONFERENCE FOR DISTINGUISHED ADVISORS

Network with a highly influential delegate base of multi-disciplinary advisors representing client bases of 100 to 3000 each. Hundreds of thousands of end user clients who will have the opportunity to know more about your brand. . .by professional referral!

Reach 150 to 200 Distinguished Delegates in Person Representing Thousands of Clients in Addition to Being Featured in Extensive National Event Related Marketing.

● THE EDUCATIONAL TOOLKIT

Showcase your technology within KB's professional education programs, connecting directly with tax and financial professionals as they apply real-world tools in their training.

NEW! Provide scholarships to deserving team members, associates, and others in your circle of influence.





SIX OPPORTUNITIES TO BUILD YOUR BRAND AND REACH NEW AUDIENCES

Reach Canada's Most Significant Multi-Professional Advisory Network of Tax, Accounting & Financial Professionals

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Knowledge Bureau Report

A thorough analysis of today's financial news—delivered weekly to your inbox. As part of Knowledge Bureau's interactive news network, the Report covers breaking news in the tax and financial services landscape, budget and economic statement analysis, and provides a wide range of professional benefits, including access to peer-to-peer blogs, opinion polls, cutting edge articles that interpret changes in tax and financial news all vital information to share in your network from Canada's only multi-disciplinary financial educator.

Real Tax News Podcasts

Nothing fake about it. . . it's tax, retirement and investment news you can use with Canada's award-winning business educator and best-selling author Evelyn Jacks and her guests. If you are a thought leader, plan to appear with Evelyn on this podcast, available at all popular streaming networks.

Email Directs to Knowledge Bureau Students, Grads and Subscribers

Since 2003, Knowledge Bureau has developed and delivered a world-class financial education to a growing number of professionals in the tax and financial services industry. Over 20,000 returning students and their teams grace the Knowledge Bureau Network. Knowledge Bureau is proud to have issued over 1,212,500 certificates in its continuing education series, over 25,200 professional development certificates and diplomas, granted over 1800 Distinguished Designations and celebrated over 16,350 live-virtual certificate course graduation certifications.

The Virtual CE Summits

The Virtual CE Summits are full and half day technical training events. Full day events are focused on professional tax updates, retirement and estate planning, CRA and regulatory audit defence and year end tax planning for investors and business owners. Half day events focus on how to build high value professional practices.

The Acuity Conference for Distinguished Advisors

Become part of a fantastic line-up of highly educational keynote speakers! This strategic conference - held live in spectacular locations clients gravitate towards in retirement - is a highlight for wealth advisors from across Canada every November. Cutting edge topics in tax-efficient retirement and estate planning, economics, wealth management, portfolio management, succession planning, and practice management. Most important you can host incredible networking experiences with top flight advisors from coast-to-coast.

The Educational Toolkit

Integrate your software and tech products in Knowledge Bureau Courseware. A practical way for our students to learn more about your brand! Offer valuable scholarships to deserving attendees in your circle of influence.

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Build Your World Class Brand



“Knowledge Bureau has been a significant part of the success of Dynamic’s award-winning Snapshots program. Their continuing education accredited courses have been taken by thousands of advisors across Canada who are interested in strengthening their relationships with clients by offering holistic advice as their clients’ lives change.”

- Yasminka Marcus, Senior Manager, Education, Wholesale and Advisory, Dynamic Funds

Chart Your Financial Career Path with Knowledge Bureau

Workplace Training Opportunities

Customize your own pathway with a KB Education.

RWM™ Real Wealth Manager Designation

90 Hours. A specialized credential for leaders of multiple stakeholders to wealth management plans.



Senior Leadership Designations



CE Master Certificates

Advanced Summits and micro-credentials for lifelong continuing professional development.

MFA-P™ Philanthropy Designation

90 Hours. A specialized credential for leaders and for senior planners focused on philanthropy and estate planning.



Professional Diplomas

60 Hours. Ideal for full time seasonal pros: Take the Professional Practitioner Diploma and/or the CE Summit - Advisory Diploma.



Professional & Specialized Credentials



DMA-Specialist™ Designation

180 Hours. Critical upskilling ideal for management and entrepreneurial leaders. Specialize in Personal Tax, Corporate Tax, or Accounting Services.

Foundational & Team Training

Income Tax Fundamentals Certificate

20 hours. Ideal for anyone new to tax prep: receptionists, assistants and financial advisors.



Certified Tax Preparer Certificate

36 Hours. Move up to professional certification. Enhance your Income Tax Fundamentals Certificate with 16 hours of virtual instruction from dynamic, experienced faculty.



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Company Name:	
First Name:	Last Name:
Phone Number:	Email:
Address:	

RECOGNIZED MEDIA AND COMMUNICATIONS OPPORTUNITIES

KNOWLEDGE BUREAU REPORT

Per Insertion: \$2,500

REAL TAX NEWS PODCAST

\$750 per Episode

EDIRECT

Per Insertion: \$5,995

PARTNER WITH US FOR LIVE, VIRTUAL EDUCATIONAL EVENTS

CE SAVVY SUMMITS (FULL DAY EVENTS)

NEW! Ask About Half Day
Business Builder Events

January:
Advanced T1 Tax Update

Certificate Sponsor:
 Diploma Sponsor:
 Content Sponsor:

May:
Retirement & Estate Planning

1 Event
The Series
Ads in the Knowledge Journal

September:
Audit Defence

\$2,995
\$2,695 x 4
\$2,500

November:
Year-End Tax Planning

**Inquire
About
Scholarships
Included**

ACUITY CONFERENCE:

ACUITY CONFERENCE

Title Sponsor: \$15,000
 Platinum Sponsor: \$12,500
 Gold Sponsor: \$10,500
 Silver Sponsor: \$7,500
 Bronze Sponsor: \$3,500

EARLY BIRD:

\$14,250
\$11,995
\$ 9,995
\$ 6,995
\$ 2,995

SCHOLARSHIPS:

COMPLIMENTARY REGISTRATION *:

5
4
3
2
1 *Value at team member rate \$1,495 each

EDUCATIONAL TOOLKIT

Include your software or tech tools in Knowledge Bureau Certificate Course studies: \$9,995*
*Minimum two academic years - July 1st to June 30th

Thank You for Your Partnership and Commitment to Delivering World-Class Financial Education!

PAYMENT OPTIONS:

VISA MasterCard E-Transfer Please provide invoice

Number: _____

Expiry: _____

Signature: _____

Taxes \$ _____ Total \$ _____

(GST # 885004713RT00001)

Please complete and return this form with payment

For all Sponsorships: Biography and logos must be received with payment. Company recognition to be added to all event related marketing within two weeks of payment.

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